

West St Leonards

Neighbourhood Plan
Housing Needs Assessment (HNA)

April 2025



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2. Internal Review	February 2025	Kerry Parr	Associate Director
3. Group Review	April 2025	William Ackroyd	Member of the West St Leonards Neighbourhood Forum
4. Locality Review	April 2025	Cathy Varley	Senior Development Officer
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List of acronyms used in the text:

HBC	Hastings Borough Council
HEDNA	Housing and Economic Development Needs Assessment
HMA	Housing Market Area
HNA	Housing Needs Assessment
HRF	Housing Requirement Figure (the total number of homes the NA is expected to plan for, usually supplied by LPAs)
HLIN	Housing Learning and Improvement Network
HRP	Household Reference Person
LA	Local Authority
LHN	Local Housing Need
LHNA	Local Housing Needs Assessment
LPA	Local Planning Authority
LSOA	Lower Layer Super Output Area
MHCLG	Ministry of Housing, Communities, and Local Government
MSOA	Middle Layer Super Output Area
NA	Neighbourhood (Plan) Area
NP	Neighbourhood Plan
NPPF	National Planning Policy Framework
OA	Output Area
ONS	Office for National Statistics
PPG	Planning Practice Guidance
PRS	Private Rented Sector
RQ	Research Question
SHMA	Strategic Housing Market Assessment
VOA	Valuation Office Agency
WSLF	West St Leonards Neighbourhood Forum

1. Executive Summary

- 1.1.1. West St Leonards is a Neighbourhood Area (NA) located in the borough of Hastings. The NA boundary covers the areas administered by Hastings Borough Council (HBC).
- 1.1.2. Because much of this report is guided by Census data, it is important to first note that it is not possible to exactly represent the NA of West St Leonards through a combination of Census Output Areas (OAs). This assessment has therefore adopted the approach that where more than half of an OA's respective homes lie within the NA boundary, the OA will be included in the analysis, and where more than half of the respective homes lie outside of the NA boundary, the OA will be excluded.
- 1.1.3. With this in mind, the 2021 Census recorded 6,815 individuals in the OAs deemed to best represent West St Leonards (hereafter, referred to as just West St Leonards or the NA), indicating an increase of 48 people since the 2011 Census¹. In terms of households, there has been a consolidation of the population resulting in a decrease in 111 households since 2011, with 2,901 households recorded in the 2021 Census.
- 1.1.4. There has been a moderate level of development in West St Leonards in recent years. HBC has provided data showing that a net increase of 203 new homes have been provided since 2011. Of these, 59 were delivered as Affordable Housing. Adding this figure to the count made at the time of the 2011 Census, the current total number of dwellings in the NA is therefore estimated to be 3,319. As of 07/01/2025, outstanding commitments (dwellings on sites with planning permission) total 135 homes, 98 of which are under construction.
- 1.1.5. This Executive Summary details the conclusions of each chapter of this Housing Needs Assessment (HNA), addressing each of the themes agreed with the West St Leonards Neighbourhood Forum at the outset of the research.
- 1.1.6. Data from the 2021 Census is continuing to be released. At present, the available data covers population, households, tenure, and dwelling stock characteristics. Some data from the Census 2021 at the localised level is not yet available, as well as some data comparing numerous variables. As such this HNA will draw on the latest available data from the 2021 Census where possible and will also continue to use other data sets, including 2011 Census, Valuation Office Agency data, and ONS projections where necessary to build up evidence at the neighbourhood level.
- 1.1.7. This HNA has been undertaken in line with the National Planning Policy Framework (NPPF)² and practice guidance (both published in December 2024).³

¹ Note that calculations carried out by the West St Leonards Neighbourhood Forum estimate the actual population of the NA to be 7,125, disregarding the constraints related to using Census Output Areas. Source: https://www.hastings.gov.uk/content/WSL-consultation/WSL_demographicdetails_2023_07.pdf

² [National Planning Policy Framework](#) published in December 2024

³ [Housing and economic needs assessment - GOV.UK](#) published in December 2024

1.2. Affordability and Affordable Housing

Current tenure profile

- 1.2.1. Home ownership is the dominant tenure in West St Leonards (65.6%), sitting above both the average of Hastings (56.6%) and England (61.3%) more widely. Of the remaining non-owning households, private renting is the most common tenure, with a comparatively low number of people who rent from a social landlord in West St Leonards (6.2%), compared to Hastings (14.3%) and England (17.1%), where it is almost three times more common.
- 1.2.2. That said, the most popular forms of tenure, owned and private rented, have actually both decreased in number since 2011. This is most likely due to a proportion of homes switching to second homes or holiday lets. Although still making up a relatively small proportion of the housing stock, shared ownership has risen the most (15.8%) and the number of those with a social landlord has increased by 7.8%.

Affordability

- 1.2.3. House prices in the NA have followed a general upward trajectory despite some year-on-year fluctuations. The current median house price (middle number when arranged from lowest to highest) is £300,000, which is a growth of 85.2% since 2014. The lower quartile of house prices, which is typically taken as a good representation of 'entry-level' housing, is around 76% of the median price, meaning there is limited variety at the lower end of the market and that truly entry-level properties infrequently come up for sale.
- 1.2.4. It is worth noting that house prices in the NA are consistently more expensive than those in the surrounding local authority. West St Leonards' mean, median and lower quartile house prices in 2023 were 6.3%, 11.7% and 23.3% more expensive respectively, when compared to Hastings' homes.
- 1.2.5. AECOM has estimated the annual income required to afford various tenures of housing in West St Leonards – each of which is explained in detail in Appendix C. These thresholds are compared to incomes to determine which options are the most appropriate for local people going forward. The average household income in the NA area was £42,500 in 2020 and the lower quartile household income for Hastings was £16,888 in 2023.
- 1.2.6. It was found that local households on average incomes are unable to access even entry-level homes unless they have the advantage of a very large deposit. The median house price would require an annual income of just under double the current average. Private renting is more affordable but is generally only accessible to those on above average incomes. A broader challenge in relation to private renting is that, though potentially cheaper, there are still too few properties at an affordable price regularly available to make this a reliable option for lower income households.
- 1.2.7. Subsidised routes to home ownership like First Homes and Shared Ownership are intended to target people who can afford to rent but not to buy. In West St Leonards,

there is a relatively large gap between the income needed to afford to rent (£45,400) and to buy (£58,693), so many may benefit from these products.

- 1.2.8. In Neighbourhood Plans, the discount on Discount Market Sale Homes can be set at 20% and for First Homes can be set at 30%, 40% or 50%. In West St Leonards, neither Discount Market Sale Homes, nor the minimum First Homes 30% discount or the enhanced 40% discount, appear to be sufficiently affordable to average income households. Only the 50% discount level appears just affordable to average earning households, and no version of this product is close to being affordable to lower earning households. First-time buyers in the former group are the more realistic target market for First Homes, so this analysis suggests that there is a need to exceed the minimum default discount level of 30% in West St Leonards, ideally to 50%, while acknowledging that even this will primarily serve average earners.
- 1.2.9. Although a 50% discount would make a more meaningful difference, this might have implications on the viability of Affordable Housing more widely, so the other discount levels should still be considered; or an alternative approach is to reduce the equivalent market value of First Homes by reducing their size or through other means.
- 1.2.10. Affordable Rented housing appears generally affordable to households with two lower earners depending on their household size (average earning households are unlikely to be eligible). However, households with a single lower earner appear unable to afford any of the tenures considered other than Socially Rented units. Many such individuals will, if unable to secure a social rented dwelling require additional subsidy through Housing Benefit to access housing.
- 1.2.11. The evidence in this chapter indicates a clear divide in housing affordability in West St Leonards, with higher earners and those already on the housing ladder potentially able to buy their own homes, average earners able to afford some alternative options (such as entry-level market rent and affordable routes to ownership) and lower earners able to access nothing but Social Rented housing. This suggests that the Affordable Rented sector, and Social Rent in particular, performs a vital function in West St Leonards as the only option for a large segment of those in the most acute need.

The need for Affordable Housing

- 1.2.12. The 2024 Hastings and Rother HEDNA identifies the need for the need for 316 additional affordable rented homes and 116 affordable home ownership dwellings each year in Hastings, which implies a ratio of 73% affordable rent to 27% affordable home ownership.
- 1.2.13. When the HEDNA figures are pro-rated to West St Leonards based on its share of the population (7.5% if the borough's population according to the 2021 Census), this equates to 24 additional affordable rented homes and 9 affordable home ownership dwellings each year in West St Leonards, or 336 affordable rented dwellings and 126 affordable owned dwellings over the plan period, respectively.

Affordable Housing policy

- 1.2.14. Affordable Housing is typically provided and made financially viable by its inclusion as a proportion of larger market developments, as guided by Local Plan policy. However, if the community wishes to boost the supply of Affordable Housing, there are other, more proactive routes available for its provision. For example, using neighbourhood development orders, identifying exception sites or developing community land trusts are all ways of boosting the supply of Affordable Housing.
- 1.2.15. HBC's emerging policy on this subject (Policy SP2) states that, for greenfield sites, 40% of all new dwellings are expected to be delivered as Affordable Housing for developments of 10 homes or more. For brownfield sites, 25% of all new dwellings are expected to be delivered as Affordable Housing for developments of 20 homes or more. There is no minimum requirement for Affordable Housing provision for developments of less than 20 homes on brownfield sites and for developments of less than 10 homes on greenfield sites.
- 1.2.16. How this is broken down into specific tenures - such as the balance between rented tenures and routes to home ownership – is specified in Policy SP2 of the emerging Local Plan, which expects a tenure mix of 60% Social/Affordable Rent, 10% affordable ownership, with the remaining 30% determined through negotiation between the local authority and developer and comprising Affordable/Social Rent, shared ownership or any other affordable tenure including intermediate and low-cost homes (which could extend to First Homes).
- 1.2.17. AECOM recommends that the emerging Local Plan's guideline mix appears to offer a suitable benchmark for West St Leonards because it prioritises the delivery of Social/Affordable Rent and also provides scope to deliver affordable home ownership products, which is in line with the conclusions of the recent HEDNA, whilst allowing for site specific negotiations between the local authority and developer.

1.3. Housing Mix: Type and Size

The current housing mix

- 1.3.1. The current dwelling mix in West St Leonards is not dominated by any single dwelling type, although semi-detached homes are the most common form of housing in the NA and exist at a much higher rate (36.5%) than is generally seen across the wider area of Hastings, and above the national average too. Flats also make up a considerable portion of West St Leonard's housing stock (28.9%), comfortably above the national average of 22.2%, reflecting the urban nature of the NA. It is interesting to note however, that the number of flats in the NA is still below the average seen across Hastings more widely, at 36.2%, with a high levels of flats in the local authority. The availability of flats can be seen as a positive in terms of serving smaller households who are looking to rent in particular, which tend to be younger populations. Detached and terraced homes sit at a more modest percentage of 17.6% and 17% respectively; a lower rate of both types of housing when compared to both Hastings and England's housing mix.

- 1.3.2. In terms of size, West St Leonards has a generally similar size mix to both Hastings and England, notwithstanding the main difference in terms of the number of 1 bed homes, where there are fewer in the NA compared to both the local authority and country. In addition, both West St Leonards and Hastings have fewer 4+ bed homes than when compared to England, which likely reflects the more urbanised nature of the two areas, as opposed to other parts of England, which may include larger country homes in comparison to the denser settlement pattern observed in these urban areas.
- 1.3.3. Census data is fairly unreliable when it comes to revealing changes to West St Leonard's housing mix over the past decade due to changes in how the relevant datasets are recorded. Nonetheless, assessing the data at face value, it suggests that there was a large decrease in 1 bedroom dwellings between 2011-2021, with the only increases in 3 and 4+ bedroom homes. However, when recent completions and future commitments as of January 2025 are added to the Census 2021 dwelling stock, this suggests that there have and will continue to be moderate increases across the board for 1, 2 and 3 bed homes and larger increases in 4+ bedroom homes as these commitments are fulfilled. Again, if new development continues to prioritise the largest homes without providing a sufficient mix of smaller sized homes, this could present problems for those who are less wealthy or those looking to downsize.

Population characteristics

- 1.3.4. West St Leonard's population is older than both Hastings' and England's, with a higher proportion of the population in all age categories older than and including 45-64, while conversely having a lower proportion than both Hastings and England in all age categories younger than 45-64. As the population continues to evolve to 2039 it is likely that the large 45-64 group in particular will enter the 65-84 cohort, and the 65-84 cohort will enter the 85 and over cohort, both points at which people's housing needs start to change – for example, requiring accessibility adaptations or additional care/support.
- 1.3.5. Since 2011, West St Leonards has seen a clear trend towards an ageing population, with the largest increase (31.3%) in the 65-84 age cohort and decreases in the younger population groups of 15-24 (-23.5%) and 25-44 (-8.9%), suggesting that West St Leonard is struggling to retain or attract younger family households and younger people in general.
- 1.3.6. This evidence would appear to support the potential for any future development to specifically attract and retain these groups if that is the community's wish, alongside an imperative to accommodate the growing population of older people – who may be seeking to downsize or experiencing changing mobility and support needs.
- 1.3.7. The composition of West St Leonard's households (in terms of the number of people, their age, and their relationships to one another) is broadly similar to that of Hastings and England. It is interesting to note that the proportion of households with non-dependent children grew by 10.1% between 2011 and 2021 in the NA, much faster than the national average of just 3.5%, which could indicate the relative unaffordability

of entry-level homes in West St Leonards, where young people are financially unable to move out and form their own households.

- 1.3.8. At the time of 2021 Census, just under three quarters of the population have at least one more bedroom than they would be expected to need, and around a third have two more. This is particularly the case for couples aged over 66 and families without children. While not uncommon, this might suggest that the NA's larger housing is not necessarily being occupied by households with the most family members, but by the people with the most wealth or by older people who have not chosen or been able to move to smaller properties. It is also of note that 3.0% of households are over occupied, which unsurprisingly, tends to be made up of family households with children.

Future population and size needs

- 1.3.9. It is possible to estimate the size mix of future homes that might best accommodate demographic trends and address imbalances in the existing housing stock. The result of this process suggests that future housing delivery should focus on smaller homes - 1 and 2 bedroom homes. This could help to achieve two key outcomes: improving affordability, and meeting the needs suggested by demographic trends (notably ageing and counteracting the decline in younger families).
- 1.3.10. However, the absence of 3 and 4+ bedroom homes in the model results means that this recommendation is fairly restrictive and imbalanced. This is partly due to differences in the starting mix of the geographies used for its key data inputs. As such, there is scope to adjust the model results to arrive at a more balanced recommendation that offers wider choice in the market and reflects affordability and other secondary evidence. Taking these various points into account, future development in West St Leonards could seek to deliver the proposed size mix as set out below:
- 65-75% 1 bedroom;
 - 15-25% 2 bedroom;
 - 0-10% 3 bedroom; and
 - 0-10% 4+ bedroom.
- 1.3.11. Some caution should be applied before taking forward such a mix into Neighbourhood Plan policy. West St Leonards plays a role in the wider housing market area and provides complimentary types and sizes of homes to those available in the centre of Hastings and Bexhill. For this reason, whilst the housing stock in the NA may appear unbalanced and in need of more smaller properties to provide choice locally, it is important to recognise that neighbourhoods with concentrations of larger properties serve an important role in wider market areas.
- 1.3.12. It is also worth noting that the evidence suggests that more of the smaller properties are not occupied by households i.e. it is likely that second homes/ holiday lets in the NA are dominated by smaller properties. This is a pattern that AECOM has observed

in other coastal areas. As such, increasing the proportion of smaller properties in new development might risk these properties being taken up by second home owners rather than residents. This is discussed further in Section 7.

- 1.3.13. The mix in this section provides a starting point to think about future housing requirements but it is important to remember that other factors should be considered in determining the dwelling mix that is desirable in the NA or on any particular site. These include the specific characteristics of the nearby stock of housing (such as its condition and design), the role of the NA or site within the wider housing market area (linked to any Local Authority strategies or plans) and site-specific factors. In addition, to avoid being too prescriptive, one potential approach would be to combine the size categories and allow for greater flexibility between them, for example by requiring the largest proportion of new homes to have 1-2 bedrooms rather than specifying percentages for each.

1.4. Specialist Housing for Older People

Characteristics of the current older population

- 1.4.1. As of the 2021 Census, there were 659 individuals aged 75 or over in West St Leonards, representing 9.7% of the population. There are currently no specialist housing schemes in the NA, however there are a higher than average number of specialist housing facilities within the wider area, but the NA just represents a relative gap in provision within an otherwise well-served area. There are 2 care home facilities within the NA, which together supply a total of 87 spaces for older people who require care. Again, there are additional care home facilities within the wider area of Hastings, as well as in the nearby town of Bexhill-on-Sea to the west of West St Leonards.
- 1.4.2. Three-quarters (75.7%) of Hastings' households aged 55-75 in 2011 (and therefore likely to reach the 75+ bracket by 2039) are owner occupiers, and the remainder predominantly rent from a social landlord. This is important because those currently owning are likely to require specialist accommodation for market purchase, being largely ineligible for subsidised housing, while those in private or social rent will need to rely on subsidised rented housing because they are unlikely to have the funds to buy.

Projected demographic change and need for specialist housing

- 1.4.3. The 75+ population of the NA is projected to increase to 1,101 by the end of the plan period, increasing from 9.7% to 15.4% of the overall population in 2039. As established in the previous chapter, West St Leonards has a slightly older population than the wider borough and population growth can be expected to be driven to some extent by older households. West St Leonards is likely to age faster in the coming years unless new development continues to attract a replacement population of younger families.
- 1.4.4. The potential need for specialist housing with some form of additional care for older people can be estimated by bringing together data on population projections, rates of

disability, and what tenure of housing the current 55-75 cohort occupy in the NA. This can be sense-checked using a toolkit based on national research and assumptions.

- 1.4.5. These two methods of estimating the future need in West St Leonards produce a range of 111 to 146 specialist accommodation units that might be required during the Neighbourhood Plan period. These estimates are based on the projected growth of the older population, thereby assuming that today's older households are already well accommodated. If this is found not to be the case, it would justify aspiring to exceed the range identified here.
- 1.4.6. These estimates are also broken down by tenure and level of support required. Broadly, 64-75% of the need is for accommodation offered for market purchase. This chimes with the higher propensity of older households to be homeowners. Especially given that there are more specialist housing units available for Social Rent as part of the current stock, future supply of specialist housing may look to focus on housing for purchase on the open market. It should be noted that Neighbourhood Plans cannot set the proportion of specialist homes to be affordable, as this generally has to be in line with Local Plan policy for all housing. Between 49-72% of the need is found to be for sheltered housing with limited support rather than additional care arrangements.
- 1.4.7. The potential additional need for care and nursing home beds in West St Leonards to 2039 can be roughly estimated at 29 residential care beds and 20 nursing care beds. The current provision of 145 care home units is likely to be sufficient to continue to satisfy future need for more intensive care arrangements, although the care homes are likely to be servicing the needs of a wider area than West St Leonards alone. Though, in a similar vein, given the relative quantity of specialist housing facilities in the surrounding areas, these other locations may be able to assist those currently residing in the NA who require this type of housing.
- 1.4.8. These estimates, for specialist housing and care/nursing homes, are fairly large relative to the scale of recent and expected future development. It should therefore be emphasised that it may not be considered prudent to prioritise the potential demand from older people to the exclusion of other groups, such as those in need of Affordable Housing, young families, and others important to maintaining a balanced and vibrant community.
- 1.4.9. The HNA evidence can be used to support specialist housing development but does not make that obligatory. How far to promote this is a choice for the West St Leonards Neighbourhood Forum and the wider community.

Accessibility and Adaptability

- 1.4.10. Depending on whether there is likely to be a large volume of additional specialist supply during the Plan period, an alternative or additional avenue to the provision of additional specialist homes is to discuss the standards of accessibility and adaptability required of new development with HBC. There is a particularly high degree of overlap between the groups served by sheltered specialist housing and adapted mainstream housing, so the unmet need for such homes identified here can be reduced through this avenue.

1.4.11. Policy DP2 already sets standards for specific targets for new homes to meet Category M4(2) accessibility standards or M4(3) wheelchair user standards. It is unclear whether Neighbourhood Plans can set their own requirements to meet specific localised needs that differ to the LA, so discussions with HBC are advised if action on this point is a key priority. If this were done, it would demand a high standard of evidence to depart from the Local Plan.

1.5. Second Homes

- 1.5.1. Neighbourhood Plan policies controlling second home ownership are typically evidenced by demonstrating a high or rapidly increasing rate of second home ownership within a context of acute affordability challenges and/or serious constraints in the availability of overall housing.
- 1.5.2. The existence of second or holiday homes is not necessarily a problem in and of itself. It becomes a problem when it creates intense competition for local home buyers (or renters), inflates prices, or reduces the resident population to the extent that local services, employment, and community vitality are impacted.
- 1.5.3. West St Leonards clearly exhibits some wider challenges, with some affordability issues and a decline in the private rented sector over the last 10 years, with a rapid increase in the proportion of dwellings with no usual resident household between 2011 and 2021, increasing from 4.4% to 10.2% of all dwellings.
- 1.5.4. Although not substantially above the average of local authority or England of 8.5% and 6.0% respectively, the rate of increase in the NA may be cause for concern.
- 1.5.5. It is worth noting that across the country (or even the local authority area), dwellings will be empty for different reasons (including being uninhabitable), not just second home ownership. However, due to the location and nature of the NA it is assumed that the majority of dwellings without usual residents are second homes, either personal or for holiday let.
- 1.5.6. Of the 23 whole properties identified for letting on Airbnb between July and August 2025, the average nightly cost was £159, amounting to a rental income 3.78 times greater per month than that associated with longer term private rents. This may go some way to explain the increased rate of holiday lets in the NA.

2. Context

2.1. Local context

- 2.1.1. West St Leonards is a Neighbourhood Area (NA) located in the borough of Hastings in East Sussex. The NA boundary is situated along the south coast, between the towns of St Leonards-on-Sea and Hastings and covers the West St Leonards ward and parts of the adjoining Maze Hill and Central St Leonards wards. The NA was designated on 6 February 2024.
- 2.1.2. The Neighbourhood Plan is envisaged to start in 2025 and extend to 2039, therefore covering a period of 14 years and aligning with the end date of the emerging Hastings Local Plan. The evidence supplied in this report will look forward to the Plan end date of 2039, but where possible will also provide annualised figures which can be extrapolated to a different term if the Neighbourhood Plan period changes.
- 2.1.3. The NA is predominantly occupied by the ward of West St Leonards and the remainder of the NA is made up from parts of the Maze Hill and Central Saint Leonards wards. These additional areas help reflect the neighbourhood more coherently, although in any urbanised area boundaries are rarely that precise or rigid. The NA is situated to the southwest of the borough of Hastings and to the west of the town of Bexhill-on-Sea. It lies approximately 19km east of Eastbourne and 85km south of London.
- 2.1.4. Housing within the NA is set out in a largely linear settlement pattern along two main roads. The first of which, the A259, runs east-west along the south coast, acting as the most important transport route within the NA. A concentration of housing can also be found to the north of the NA, branching off of Harley Shute Road (B2092) which runs north-south through the NA. Of additional note is the Combe Haven Holiday Park which sits to the west of Harley Shute Road, taking up a significant portion of the NA with space for 497 privately owned caravan pitches and 283 caravans for let. West St Leonards Station is also situated within the NA, which is served by the Southeastern service providing regular trains to London Charing Cross.

2.2. The NA boundary and key statistics

- 2.2.1. For Census purposes, the NA is made up, like the rest of England, of statistical units called Output Areas (OAs). A breakdown of the OAs relevant to West St Leonards is provided in Appendix A. A map of the Plan area appears below in Figure 2-1.

Figure 2-1: Map of the West St Leonards Neighbourhood Area



Source: *Hastings Borough Council*⁴

2.2.2. At the time of the 2021 Census the NA was home to 6,815 residents, formed into 2,901 households and occupying 3,230 dwellings. This data indicates population growth of around 48 people (or 0.7%) since 2011, when the Census 2011 recorded a total of 6,767 residents and 3,012 households. Comparing Census 2021 dwellings figures with 2011 suggests growth of 114 in the number of dwellings over the 10 year period. This is set out in Table 2-1.

Table 2-1: West St Leonards population, households and dwellings totals, 2011 - 2021

Dataset	2011	2021	% Change
Population	6,767	6,815	0.71%
Households	3,012	2,901	-3.69%
Dwellings	3,116	3,230	3.66%

Sources: *Census 2021 and 2011, AECOM Calculations*

2.2.3. West St Leonards is therefore presented with the situation where, between 2011 and 2021, the number of households has decreased, yet the number of dwellings and overall population (albeit by a small amount) has increased. There could be a number of explanations for this.

⁴ Available at https://www.hastings.gov.uk/content/west-stleonards-forum/constitution_amended_2023_05_redacted.pdf

- 2.2.4. With respect to the rise in population and fall in households, this may indicate that existing families have grown in size – most likely reflecting more adult children living at or returning to parental homes, either for affordability reasons or because more university students returned home than usual due to the national Covid 19 lockdown in place at the time of the Census.
- 2.2.5. With respect to the rise in dwellings, there was a surprising amount of development given there was only a small increase in population and a decrease in households within West St Leonards. This may be indicative of an increasing number of vacant homes (which could be caused by low demand in some areas) or an increasing number of second homes in West St Leonards (which could be caused by people using dwellings as second homes or holiday lets). The national average for non-occupation rates stands at 6%, however in West St Leonards just over 10% of homes are not occupied by households and this is likely to reflect the presence of second homes/ holiday lets in the stock.

2.3. The housing market area context

- 2.3.1. Whilst this Housing Needs Assessment (HNA) focuses on West St Leonards NA it is important to keep in mind that neighbourhoods are not self-contained housing market areas. Housing market areas are usually wider than local authority areas and often stretch across a number of districts or boroughs. This is because housing market areas are inherently linked to the labour market, employment patterns and travel to work areas.
- 2.3.2. In the case of West St Leonards, the NA sits within a housing market area which covers Hastings and Rother⁵. This means that when households who live in these authorities move home, the vast majority move within this geography. This housing market area constitutes one of the smallest functional housing markets in the South East. Some of the northern parts of Rother relate to Tunbridge Wells rather than Hastings, however the vast majority of links relating to West St Leonards are generally within this housing market area.
- 2.3.3. At the neighbourhood scale it is not possible to be definitive about housing need and demand because neighbourhoods, including West St Leonards, are closely linked to other areas. In the case of West St Leonards, changes in need or demand in settlements nearby are likely to impact on the neighbourhood. This is particularly the case given that West St Leonards is part of the urbanised borough of Hastings as well as being located closely to the town of Bexhill-on-Sea to the west. Planned town extensions, regeneration projects or allocations for large developments (for example the Hastings draft Local Plan has currently identified sites that could deliver 3,866 dwellings outside of the NA) in these nearby areas could accommodate housing need from West St Leonards.

⁵ Available at:
[https://www.hastings.gov.uk/content/evidencebaseddocuments/Hastings and Rother Strategic Housing Market Assessment Update June 2013.pdf](https://www.hastings.gov.uk/content/evidencebaseddocuments/Hastings%20and%20Rother%20Strategic%20Housing%20Market%20Assessment%20Update%20June%202013.pdf)

2.3.4. In summary, West St Leonards functions within a wider strategic area. As well as fostering good working relationships with the local planning authority (Hastings Borough Council), it is therefore useful to think about the role of the neighbourhood within the wider area. This HNA can provide evidence to understand this role and the specific features of the neighbourhood within this wider context. Neighbourhood Plans can have a significant impact in shaping their neighbourhoods, enhancing the positive role the neighbourhood plays within the wider housing market, or developing policies to change entrenched patterns and improve housing outcomes in the neighbourhood and wider area.

2.4. Planning policy context

2.4.1. Neighbourhood Plans are required to be in general conformity with adopted strategic local policies.⁶ In the case of HBC, the relevant adopted Local Plan consists of:

- Hastings Planning Strategy 2011 – 2028 (adopted February 2014). This provides a long term plan to deliver regeneration and sustainable growth in the Borough up to 2028.
- Development Management Plan (adopted September 2015). This sets out policies for the management of development in the town as well as specific allocations to meet the overall targets set in the overarching Hastings Planning Strategy.

2.4.2. Together, they form the statutory Development Plan for Hastings.

2.4.3. Preparation of the new Local Plan is underway. The draft new Local Plan will cover a 20-year period from 2019 - 39. The new Local Plan will set out the council's spatial strategy for growth and new development in Hastings. It will also include detailed development management policies setting out the form development in Hastings will need to take and any measures required to mitigate the impact of development. The Regulation 18 version of the Local Plan was consulted upon in Q4 2020/21, with responses being used to inform the Regulation 19 version set to be published for further comments in Q1 2025/26. Subject to the outcomes of independent examination, the new local plan is expected to be adopted in Q4 of 2026/27.

2.4.4. A detailed breakdown of the Local Plan policies relevant to housing need is provided in Appendix B. Here, it is worth summarising the most important points of the emerging Local Plan:

- Emerging Local Plan Policy SP2 identifies a minimum overall housing target of 4,275 homes for the borough over the plan period (213.75 per annum), with additional homes delivered in the Hastings Central Focus Area as part of mixed-use development. However, this stated figure is less than half of the old standard method calculated housing need figure for Hastings of 490 homes per year, and well below the new NPPF 2024 standard method calculated housing need figure

⁶ A description of the Basic Conditions of Neighbourhood Planning is available at <https://www.gov.uk/guidance/neighbourhood-planning--2#basic-conditions-for-neighbourhood-plan-to-referendum>

of 790 homes per year, so opportunities for homes will need to be capitalised upon in areas beyond the designated sites and the overall number of homes delivered is likely to be much higher;

- In Policy SP1, the southeastern part of the NA falls under part of a 'Focus Area' ('West Marina and West St Leonards'), where significant development of new homes will be maximised and development should optimise densities whilst ensuring high quality design and, wherever feasible, enhancing visibility of and access to natural and historic assets. This is a change from the adopted plan, in which the NA is part of the 'Filsham Valley & Bulverhythe' focus area, which is designated for an indicative quantity of 630-700 dwellings over the plan period.
- Policy SP2 states that, for greenfield sites, 40% of all new dwellings are expected to be delivered as Affordable Housing for developments of 10 homes or more. For brownfield sites, 25% of all new dwellings are expected to be delivered as Affordable Housing for developments of 20 homes or more. There is no minimum requirement for Affordable Housing provision for developments of less than 20 homes on brownfield sites and for developments of less than 10 homes on greenfield sites.
- Policy SP2 also states that the expected tenure mix within Affordable Housing is 60% affordable rent to 10% affordable home ownership, with the remaining 30% determined through negotiation, but comprising affordable rent / social rent, shared ownership or any other affordable tenure including intermediate and low cost homes (including First Homes);
- Policy DP2 sets out an expectation that 100% of new homes will be built to Category M4(2) accessibility standards.

2.5. Quantity of housing to provide

2.5.1. The NPPF 2024 (paragraphs 69 and 70) requires LPAs to provide designated neighbourhood areas with a housing requirement which reflects the overall strategy for the pattern and scale of development and any relevant allocations. Where it is not possible for the LPA to provide a requirement figure for a neighbourhood area the NPPF states that the LPA should provide an indicative figure, if requested to do so by the neighbourhood planning body.

2.5.2. HBC have provided an indication of the scale of housing growth expected within the NA by identifying a number of draft allocations within the NA. The sum of all the allocations within the NA boundary in the emerging Regulation 18 Local Plan sums up to 406 dwellings over the plan period, as set out below:

- HL9 - Seaside Road, West St Leonards for approx. 152 homes;
- HL11 - Cinque Ports Way for approx. 25 homes;
- HL12 - Former Malmesbury House, West Hill Road for approx. 117 homes;
- HL14 - 190 Bexhill Road for approx. 32 homes;

- HL111 - Gambier House, 111 West Hill Road and West House, 115 West Hill Road for approx. 20 homes;
- HL115 - Former West St Leonards Primary School, Bexhill Road for approx. 60 homes.

2.5.3. It should however be noted that the sum of allocations is not always the same as an indicative requirement but provides a guide to the scale of development likely within the NA over the plan period. Given the increase in the standard method calculated housing need figure for Hastings since the Regulation 18 Plan was published, the housing requirement for the borough as a whole, and individual neighbourhoods, may increase as the new Local Plan progresses.

3. Objectives and Approach

3.1. Objectives

3.1.1. This HNA is structured according to a number of themes or topics that were agreed at the outset of the research with the West St Leonards Neighbourhood Forum. These themes are broadly aligned with the kinds of housing policy areas available to neighbourhood plans, and each will form a distinct chapter of this report. The sub-sections below give a brief overview of the objectives of each chapter.

Affordability and Affordable Housing

3.1.2. Neighbourhood plans may include policies that influence the scale of Affordable Housing provision and the mix of different tenures and products provided through new housing development.

3.1.3. This chapter has three aims, each given its own sub-section:

- To establish the existing **tenure** of homes within the NA at present (owner occupied, private rented, Social/Affordable Rented, shared ownership);
- To examine the **affordability** of different tenures by considering house prices, rents, local incomes and earnings; and
- To estimate the scale of **need** for Affordable Housing, including the need for those who cannot afford to rent and those who cannot afford to buy.

3.1.4. The evidence gathered here can be used to justify planning policies in the Neighbourhood Plan, but it is likely that other supporting evidence may be needed, for example on viability. Local Plans typically include policies on Affordable Housing and whilst the Neighbourhood Plan must be in general conformity with these strategic policies, there is scope for Neighbourhood Plan policies to add detail and nuance to reflect localized circumstances where this is supported by the evidence.

Housing Mix: Type and Size

3.1.5. It is common for neighbourhood plans to include policies that influence what form new housing should take in terms of type and size. This requires evidence of what local households need.

3.1.6. The focus of this section is to identify relevant trends and potential gaps in the market that can be used to justify planning policies. It has three aims, each given its own sub-section:

- To establish what **mix** of housing exists in the NA at present;
- To describe relevant characteristics of the local **population**; and
- To look to the **future**, considering how the population is likely to change over time and what mix of homes would be most appropriate to build.

3.1.7. In addition to the direction of travel revealed by data, a variety of reasons sit behind the choices that households make that are less easy to predict, including wealth, accessibility requirements and personal preference. The evidence in this section provides a starting point for developing and justifying planning policies but does not provide definitive recommendations as it may be appropriate to take into account other factors and site specific circumstances.

Specialist Housing for Older People

3.1.8. It may be appropriate for neighbourhood plans in areas with ageing populations to include policies relating to specialist housing for older persons.

3.1.9. This chapter supplements the demographic evidence in the previous section (Housing Mix: Type and Size), including the potential demand for downsizing, to consider the quantity and characteristics of need for housing for older people with some form of additional care. Its approach is as follows:

- To review the **current provision** of specialist housing in the NA;
- To estimate the **potential demand** for this form of accommodation with reference to the projected growth in the older population and current rates of mobility limitation; and
- To discuss the potential for meeting this need through adaptations to the mainstream stock and other **additional considerations**.

3.1.10. This element of the HNA recognises that the majority of older people will live in the mainstream housing stock and that there is no single way to meet their needs. It may also be inappropriate to focus excessively on the needs of one group or to promote a specialist scheme in a location that lacks adequate services. These issues will be drawn out.

Second Homes

3.1.11. This chapter considers the potential scale of second homes ownership, including commercial holiday lets, in the NA. The approach is as follows:

- To estimate the **current level** of second home ownership (including commercial holiday lets);
- To estimate the **financial incentive** for home owners to use their properties for commercial holiday lets as opposed to long term private rentals; and
- To discuss the potential **policy options** relating to second homes in the NA.

3.2. Approach

3.2.1. This HNA assesses a range of evidence to ensure its findings are robust for the purposes of developing policy at the neighbourhood plan level. This includes data from the 2021 and 2011 Censuses and a range of other data sources, including:

- ONS population and household projections for future years;

- Valuation Office Agency (VOA) data on the current stock of housing;
- Land Registry data on prices paid for housing within the local market;
- Rental prices from [Home.co.uk](https://www.home.co.uk);
- Local Authority housing waiting list data; and
- Housing and Economic Development Needs Assessment Update, February 2024.

3.2.2. Data from the 2021 Census continues to be released. At present, the available data covers population, households, tenure, and dwelling stock characteristics. Some data at the localised level, including for parishes, and some datasets which compare numerous variables, has not yet been made available. As such, this HNA draws on the latest available data from the 2021 Census where possible and will also continue to use other data sets, including 2011 Census, Valuation Office Agency data, and ONS projections to build up evidence at the neighbourhood level.

4. Affordability and Affordable Housing

4.1. Introduction

4.1.1. Neighbourhood plans may include policies that influence the scale of Affordable Housing provision and the mix of different tenures and products provided through new housing development.

4.1.2. This chapter has three aims, each given its own sub-section:

- To establish the existing **tenure** of homes within the NA at present (owner occupied, private rented, Social/Affordable Rented, shared ownership);
- To examine the **affordability** of different tenures by considering house prices, rents, local incomes and earnings; and
- To estimate the scale of **need** for Affordable Housing, including the need for those who cannot afford to rent and those who cannot afford to buy.

4.1.3. The evidence gathered here can be used to justify planning policies in the Neighbourhood Plan, but it is likely that other supporting evidence may be needed, for example on viability. Local Plans typically include policies on Affordable Housing and whilst the Neighbourhood Plan must conform with these policies, there is scope for Neighbourhood Plan policies to adopt some local variety where this is supported by the evidence.

4.1.4. This HNA has been undertaken in line with the National Planning Policy Framework (NPPF) and Planning Practice Guidance (PPG) (published 2024).

4.2. Definitions

4.2.1. This section uses a range of technical terms which are useful to define at the outset:

- **Tenure** refers to the way a household occupies their home. Broadly speaking, there are two categories of tenure: market housing (such as homes available to purchase outright or rent from a private landlord) and Affordable Housing (including subsidised products like social rent and shared ownership).
- **Affordability** refers to the relationship between the cost of housing to buy or rent and the incomes and earnings of households.
- The definition of **Affordable Housing** is set out in the NPPF 2024 (Annex 2) as 'Housing for sale or rent, for those whose needs are not met by the market...' We refer to Affordable Housing, with capital letters, to denote the specific tenures that are classified as affordable in the NPPF (Annex 2). A relatively less expensive home for market sale may be affordable but it is not a form of Affordable Housing.
- A range of affordable home ownership products are included in the Government's definition of Affordable Housing, to meet the needs of those aspiring to own a home. This includes discounted market sales housing and other affordable routes to home ownership (shared ownership, rent to buy etc) which are defined in Annex 2. First Homes are also part of the range of affordable home ownership products,

but the definition of First Homes and policy is covered in a Ministerial Statement (2021) and not defined in Annex 2.⁷

4.3. Current tenure profile

- 4.3.1. The current tenure profile is a key feature of the Neighbourhood Area (NA). Patterns of home ownership, private renting and Affordable/Social Renting reflect demographic characteristics including age (with older households more likely to own their own homes), and patterns of income and wealth which influence whether households can afford to rent or buy and whether they need subsidy to access housing.
- 4.3.2. Table 4-1 presents data on tenure in West St Leonards compared with Hastings and England from the 2021 Census. It shows that home ownership is clearly the most common tenure in West St Leonards (65.6%) – which sits above both the rate in Hastings (56.6%) and England (61.3%). Of the remaining non-owning households, private renting is the most common tenure (27.2%), which is at a similar level to the surrounding Hastings area (28.7%), but more common than the rest of the country (17.1%). There is a comparatively low number of people who rent from a social landlord in West St Leonards (6.2%), compared to Hastings (14.3%) and England (17.1%), where it is almost three times more common. In line with the local authority and rest of England, shared ownership levels remain relatively low at around 1%.

Table 4-1: Tenure (households) in West St Leonards, 2021

Tenure	West St Leonards	Hastings	England
Owned	65.6%	56.6%	61.3%
Shared ownership	1.0%	0.5%	1.0%
Social rented	6.2%	14.3%	17.1%
Private rented	27.2%	28.7%	20.6%

Sources: Census 2021, AECOM Calculations

- 4.3.3. It is also worth comparing how the tenure mix has changed in the last ten years, using the 2011 Census (see Table 4-2). Although still making up a relatively small proportion of the housing stock, shared ownership has risen at the highest rate (15.8%). The number of owners and private renters has decreased in number since 2011. This is most likely due to properties being used as second homes or holiday lets. There has been a small increase in the number of households living in social rented homes, reflecting a new Affordable Housing delivered through new completions since 2011.

⁷ The shape that the new First Homes product will take is set out in a Ministerial Statement issued in May 2021, available here: <https://questions-statements.parliament.uk/written-statements/detail/2021-05-24/hlws48>. The relevant update to PPG is available here: <https://www.gov.uk/guidance/first-homes#contents>.

Table 4-3: Tenure change (households) in West St Leonards, 2011-2021

Tenure	2011	2021	% Change
Owned	1,950	1,903	-2.4%
Shared ownership	26	30	15.4%
Social rented	166	179	7.8%
Private rented	870	789	-9.3%

Sources: Census 2021 and 2011, AECOM Calculations

4.4. Affordability

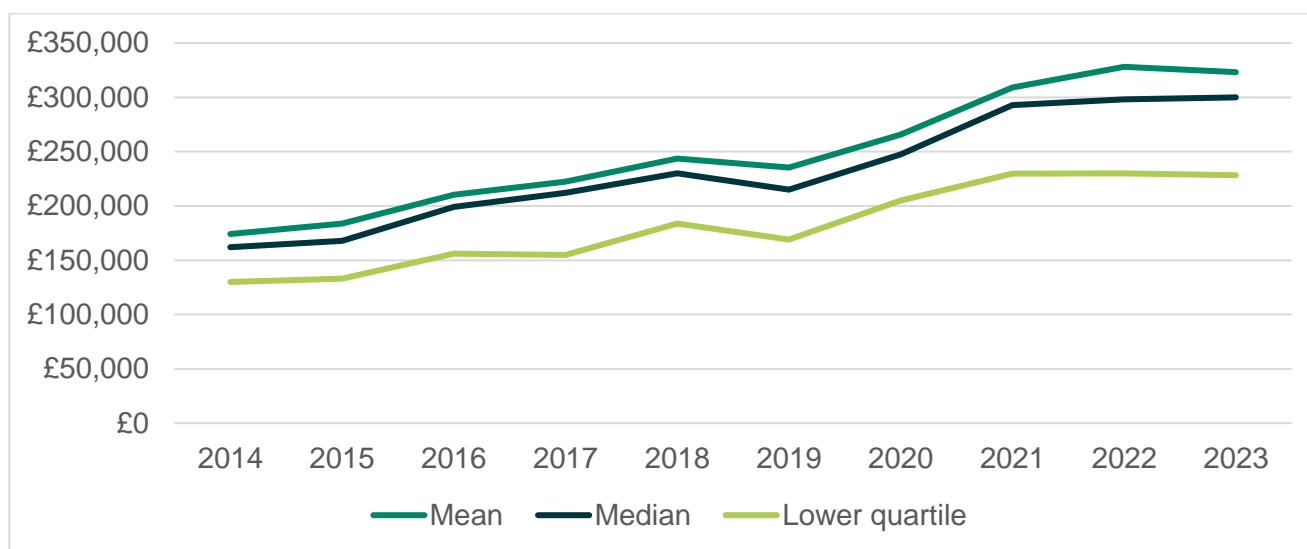
House prices

- 4.4.1. House prices provide an indication of the level of demand for homes within an area. The relationship between house prices and incomes determines whether housing is affordable to local households and, to a large extent, what tenure, type and size of home they occupy. Changes in affordability over time can indicate pressures in the housing market. As such, it is useful for the evidence base for plans to examine trends in prices and consider what this reveals about the local housing market.
- 4.4.2. Figure 4-1 looks at the average and lower quartile house prices in West St Leonards based on sales price data published by the Land Registry. It shows that prices have followed a general upward trajectory over the past decade, with some year-on-year fluctuations.
- 4.4.3. The current median (the middle number when you sort the data from smallest to largest) house price is £300,000, the current mean price (average calculated by the sum of numbers divided by total set of numbers) is £323,150, and the current lower quartile price (the median of the lowest 50% of prices house) is £228,250. The lower quartile, which is typically taken as a good representation of 'entry-level' housing, is around 76% of the median price, meaning there is limited variety at the lower end of the market and that truly entry-level properties infrequently come up for sale.⁸
- 4.4.4. The lower quartile, mean, and median price in 2023 were 75.6%, 85.2%, and 85.5% higher, respectively, than in 2014. This indicates that house prices across all tiers have increased at relatively fast rates, although those at the lower end have risen less significantly, which is important in ensuring those on lower incomes can still access these homes. Nonetheless, such levels of appreciation across the board are likely to present significant challenges for those yet to get a foothold on the property ladder.
- 4.4.5. Comparing West St Leonards to the Hastings area more widely, it can be observed that house prices in the NA are consistently more expensive than those in the surrounding local authority. West St Leonards' mean, median and lower quartile house prices in 2023 were 6.3%, 11.7% and 23.3% more expensive respectively, when

⁸ This is because normally, in a symmetric distribution, the lower quartile (Q1) is about 50% of the median (Q2). However, if Q1 is 76% of the median, this suggests a skewed distribution where the lower-priced homes are more clustered together (with very few homes at the lowest level of the scale), whilst the highest priced homes have a wider spread (and thus greater choice).

compared to Hastings’ homes. This could indicate that the NA is a particularly high-value area, or it may reflect the differences in the housing mix (for example the NA has fewer 1 bedroom homes than Hastings), which will be explored in more detail in Chapter 5, which assesses Type and Size. The fact that lower quartile house prices in West St Leonards were almost 25% higher than in Hastings in 2023 (a price differential of £53,250) suggests that it may be particularly hard for those on lower incomes to access house ownership within the NA when compared to nearby areas.

Figure 4-1: House prices by quartile in West St Leonards, 2014-2023



Source: Land Registry PPD

4.4.6. Table 4-4 breaks down house prices by type, presenting the median within each type. It shows that all types of homes except for flats have experienced strong price growth over the period, all increasing by around 75-80%. Flats have experienced the smallest increase in price of 60.9%, making them on average £70,000 more expensive in 2023 than in 2024, compared to the other types which are all over £100,000 more expensive.

4.4.7. It should be noted that it is generally more difficult to draw robust conclusions for price averages by type because the sample sizes are smaller, particularly for housing typologies that have the lowest number of transactions, meaning that the annual average is driven more strongly by the specific characteristics of properties that happen to be sold in a given year rather than trends in market demand.

Table 4-4: Median house prices by type in West St Leonards, 2014-2023

Type	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Price Growth 2014 - 2023
Detached	240K	252K	300K	340K	360K	330K	338K	428K	456K	430K	79.2%
Semi-detached	176K	183K	229K	233K	245K	241K	250K	297K	325K	315K	79.5%
Terraced	150K	160K	205K	204K	212K	201K	230K	261K	268K	264K	76.1%
Flats	115K	128K	138K	135K	157K	160K	188K	235K	230K	185K	60.9%
All Types	162K	168K	199K	212K	230K	215K	248K	293K	298K	300K	85.2%

Source: Land Registry PPD

Income

- 4.4.8. Household incomes determine the ability of most households to exercise choice in the housing market, and consequently the level of need for Affordable Housing products. Two sources of data are used to examine household incomes in the NA.
- 4.4.9. The first source is ONS's estimates of incomes in small areas. This is locally specific but limited to the overall average income (i.e. it does not provide the average income of lower earners). The average total household income locally was £42,500 in 2020 (the most recent year for this dataset). Discussion about the area to which this data applies is provided in Appendix A.
- 4.4.10. The second source is ONS's annual estimates of UK employee earnings. This provides lower quartile average earnings (i.e. the income of the lowest 25% of earners). However, it is only available at the Local Authority level. It also relates to individual earnings. While this is an accurate representation of household incomes where there is only one earner, it does not represent household income where there are two or more people earning. Hastings' gross individual lower quartile annual earnings were £18,888 in 2023. To estimate the income of households with two lower quartile earners, this figure is doubled to £33,776.
- 4.4.11. It is clear from this data that there is a gap between the spending power of average income households and those earning the lowest 25% of earnings where the household in question has one earner only.

Affordability Thresholds

- 4.4.12. To gain a clearer understanding of local affordability, it is useful to understand what levels of income are required to afford different tenures. This is assessed using 'affordability thresholds': the estimated amount of annual income required to cover the cost of rent or a mortgage given local housing prices.
- 4.4.13. AECOM has determined thresholds for the income required in West St Leonards to buy a home in the open market (average and entry-level prices), and the income required to afford private rents and the range of Affordable Housing tenures as set out in the NPPF. These calculations are detailed and discussed in more detail in Appendix C.
- 4.4.14. The key assumptions made in assessing the affordability of different tenures are explained alongside the calculations, but it is worth noting here that we have assumed that the maximum percentage of household income that should be spent on rent is 30% and that mortgage financing will be offered at a maximum of 3.5 times household income. These are standard assumptions across housing needs assessments at neighbourhood and local authority scale although different approaches are sometimes taken, and a case can be made for alternatives. This is discussed in more detail at the start of Appendix C.
- 4.4.15. The analysis in Table 4-5 does not take account of wealth (beyond savings sufficient for a 10% deposit) or existing housing equity which may provide substantial additional financial resources for many existing home owners. Wealth and equity resources are difficult to measure, particularly at the localized level. Furthermore, the affordability

analysis in HNAs is primarily focused on access to different housing options for those entering the market for the first time, either to rent or buy, and developing policies that support those who have difficulty accessing market housing. Nevertheless, many households will have additional resources that are not factored into this analysis. This is particularly the case for older owner occupiers since many own their homes outright, and/or have built up substantial equity in their existing homes over time.

4.4.16. Table 4-5 summarises the estimated cost of each tenure, the annual income required to support these costs within the NA, and whether local incomes are sufficient. The income required column assumes the household already has access to a deposit (which we have assumed to be 10% of the value to be purchased) but does not reflect the possibility that households may already hold equity from an existing property. Although these factors may be crucial to whether housing will be affordable, they are highly dependent on individual circumstances that cannot be anticipated here.

Table 4-5: Affordability thresholds in West St Leonards (income required, £)

Tenure	Mortgage value (90% of price)	Annual rent	Income required	Affordable on average incomes? (£42,500)	Affordable on LQ earnings (single earner)? (£16,888)	Affordable on LQ earnings (2 earners)? (£33,776)
Market Housing						
Median House Price	£270,000	-	£77,143	No	No	No
NA New Build Entry-Level House Price	£278,996	-	£79,713	No	No	No
LQ/Entry-level House Price	£205,425	-	£58,693	No	No	No
LA New Build Median House Price	£262,796	-	£75,084	No	No	No
Average Market Rent (and Rent to Buy)	-	£14,148	£47,160	No	No	No
Entry-level Market Rent (and Rent to Buy)	-	£13,620	£45,400	No	No	No
Affordable Home Ownership						
Discounted Market Sale (-20%)	£223,196	-	£63,770	No	No	No
First Homes (-30%)	£195,297	-	£55,799	No	No	No
First Homes (-40%)	£167,397	-	£47,828	No	No	No
First Homes (-50%)	£139,498	-	£39,857	Yes	No	No
Shared Ownership (50%)	£139,498	£3,875	£52,773	No	No	No
Shared Ownership (25%)	£69,749	£5,812	£39,303	Yes	No	No
Shared Ownership (10%)	£27,900	£6,975	£31,221	Yes	No	Yes
Affordable Rented housing						
Affordable Rent	-	£5,982	£19,939	Yes	No	Yes
Social Rent	-	£4,550	£15,167	Yes	Yes	Yes

Source: AECOM Calculations

4.4.17. Before considering each tenure category in turn, it is important to stress that these affordability thresholds have been calculated to give an indication of the costs of various tenures to inform Neighbourhood Plan policy choices. These figures rely on existing data and assumptions, and it is not possible to estimate every possible permutation. The income figures also disguise a large degree of variation. For simplicity the analysis below speaks in terms of tenure products being 'affordable' or 'not affordable' for different groups, but individual circumstances and the location, condition and other factors of specific properties in each category have a large impact. These conclusions should therefore be interpreted flexibly.

Market housing for purchase and rent

4.4.18. Thinking about housing for purchase on the open market, it appears that local households on average incomes are unable to access even entry-level homes unless they have the advantage of a very large deposit. Market housing, even with the benefit of a higher than average income, is likely to remain out of reach to most. The median house price would require an annual income 81.5% higher than the current average, based off ONS's estimates of incomes in small areas.

4.4.19. Private renting is generally only affordable to those on above average income households. As well as households made up of either one or two lower quartile earners, those on average incomes cannot afford the given rental thresholds. Affordability is improved if households are able or willing to dedicate a larger proportion of their incomes to rental costs, although this has repercussions for other quality of life aspects and cannot be assumed to suit all individuals' circumstances.

Affordable home ownership

4.4.20. There is a relatively large group of households in West St Leonards who may be able to afford to rent privately but cannot afford home ownership. They are typically earning between around £45,400 per year (at which point entry-level rents become affordable) and £58,693 (at which point entry-level market sale homes become affordable). This 'can rent, can't buy' cohort may benefit from the range of affordable home ownership products such as Discounted Market Sale, First Homes, Shared Ownership and Rent to Buy.

4.4.21. Discounted Market Sale homes are offered at a discount at least 20% on market prices. First Homes are offered at a discount of at least 30% on market prices (i.e. new build, entry-level properties). Local authorities and neighbourhood plan qualifying bodies have discretion to increase the discount on First Homes to 40% or 50% where there is evidence to suggest this is appropriate.

4.4.22. This report has estimated the income required to afford discounts of 20-50% to cover the range of discounts likely to be available on these different products. Only the 50% discount level appears affordable to average income households, and no version of this product is affordable to households made up of those on lower quartile earnings. First-time buyers in the former group are the more realistic target market for First Homes, so this analysis suggests that there is a need to exceed the minimum default discount level of 30% in West St Leonards, ideally to 50%, while acknowledging that even this will primarily serve above average earners. An alternative approach is to

reduce the equivalent market value of First Homes by reducing their size or through other means. The estimates and recommendations given here are based on an estimate using assumptions outlined in Appendix C, which may be different in practice.

- 4.4.23. It is important to note that this evidence based on affordability does not provide a complete picture: evidence about the financial viability of development is also relevant. In some cases, higher discount levels could create a financial burden on a scheme which leads developers to argue either that the discount level is not feasible or that the total amount of Affordable Housing may need to be reduced. The latter might put at risk the delivery of Social/Affordable Rented housing which may be an unintended consequence. The issue of development viability is a specialist matter involving analysis of land values and build costs that is outside the scope of this assessment. If the West St Leonards Neighbourhood Forum intend to set higher discount levels (e.g. on First Homes) than that set at district level, further discussions with the LPA are advised.
- 4.4.24. Shared ownership appears to be more affordable than Discounted Market Sale/First Homes, with Shared Ownership with an equity of 10% also be affordable for two lower quartile earners. The minimum equity share for shared ownership is 10% of the property value.⁹ If this is delivered in the NA, it will make shared ownership easier to access for more households. However, while the income threshold for a 10% equity shared ownership home is lower, this product may not necessarily be more attractive than the alternatives (such as shared ownership at higher equity shares or discounted market sale products) for those who can afford them.
- 4.4.25. Rent to Buy provides households with the option to rent at a discount (an intermediate rent at least 20% lower than the market rent) in order that they can save for a deposit to buy their property within a set period. The income required to access Rent to Buy is assumed to be the same as that required to afford market rents. However, affordability to local households would depend on how rents are set. If Rent to Buy is offered at a discount to *entry level* rents, this would expand this route to home ownership to households who earn £45,400 per year; however, this is still (just) above average household incomes. Additionally, discounts on *average* rents are still more affordable, in terms of the household income required, compared to First Homes and Shared Ownership at their most basic level. Given the availability of a deposit rather than income level per se is often the key barrier to accessing home ownership, Rent to Buy may therefore offer a useful product to meet the needs of some households. There are, however, drawbacks to Rent to Buy, as set out below.

⁹ The previous minimum equity share was 25%. This change took effect from 28 June 2021 and transitional arrangements are in place for planning policy documents that are prepared during the implementation timeframe. Changes are also introduced to make the process of staircasing to full ownership more gradual with lower minimum increments of 1%. The ministerial statement confirming and detailing the changes is available here: <https://questions-statements.parliament.uk/written-statements/detail/2021-05-24/hlws48>.

4.4.26. The range of affordable home ownership products need to be considered in relation to what they offer occupants in the long term beyond simply being affordable to access or not:

- Discounted Market Sale and First Homes allow for a greater ownership stake in the property, enabling occupiers to benefit from price appreciation over time. Monthly outgoings are also limited to mortgage costs alone, which tend to be cheaper than renting.
- Shared ownership at high equity shares performs a similar function to Discount Market Sale/First Homes, but there are additional costs associated with the rented portion.
- Shared ownership at low equity shares can usually be accessed by lower income households (than First Homes) and requires a smaller deposit. However, this is a potentially less attractive route to eventual ownership because monthly outgoings remain high. The occupant has to pay a significant monthly rent as well as service charges and other costs, so it can be harder for them to save funds to buy out a greater share in the property over time.
- Rent to Buy requires no deposit, thereby benefitting those with sufficient incomes but low savings. It is likely to be more attractive than renting but results in a much slower accumulation of the funds that can provide an eventual route to ownership than the other tenures discussed above.

Social and Affordable Rented housing

4.4.27. Social and Affordable Rented housing performs a critical role in supporting households with the most acute housing needs. These households are likely to be on the lowest incomes and unable to afford market housing without subsidy.

4.4.28. Affordable rents set out in the table above are substantially below market rents. Whilst affordable rents can be set at up to 80% of market rents, in many locations Registered Providers (housing associations) set them to ensure that they are affordable to those claiming housing benefit, i.e. at or below Local Housing Allowance levels. This means that they are in practice below 80% of market levels. This appears to be the case in West St Leonards.

4.4.29. Affordable Rented housing is generally affordable to households with two lower earners depending on their household size (average income households are unlikely to be eligible). However, households with a single lower earner appear unable to afford any of the tenures considered other than the Social Rented homes. Many households eligible for Social/Affordable Rented homes will require additional subsidy through Housing Benefit/Universal Credit to access housing.

- 4.4.30. The NPPF 2024 makes explicit reference of the need to set out the proportion of Social Rented homes needed as part of the Affordable Housing to be delivered in a local authority area (paragraph 64, NPPF)¹⁰.
- 4.4.31. Social Rents are cheaper than Affordable Rents and, in theory, would leave households on lower earnings better off and better able to afford their other living costs, such as food and fuel etc. This is particularly the case for households who are supported by Housing Benefit and subject to the overall benefit cap since their benefit income is limited by the cap and they may not be able to claim enough to cover the Affordable Rent.
- 4.4.32. Where households are supported by housing benefit and not affected by benefit caps, the difference in the cost of Affordable and Social rents may be irrelevant as the level of housing benefit flexes according to the rent. This means that these households may be no better off in social rented accommodation because they receive a lower rate of housing benefit to cover their rent.
- 4.4.33. Households who are not supported by benefits, for example those whose earnings are higher and therefore ineligible for benefits, would clearly benefit by the lower Social Rent levels because it would reduce their outgoings. However, these households are less likely to be in acute need on housing waiting lists. Rather, this scenario might apply to those already living in Social Rented housing where their financial circumstances have improved.
- 4.4.34. On balance, the relative need for Social Rented homes versus Affordable Rented homes is a complex area because of the interaction of benefits, rents and earnings. AECOM suggests that the local authority is best placed to assess what proportion of Affordable Housing should be provided as Social Rent, drawing on their waiting list data and more detailed evidence in LHNAs (Local Housing Needs Assessments). If the neighbourhood group wishes to develop localised policy in this area, this will be best achieved through liaison with the LPA (and local housing officers) as well as local registered providers.

4.5. Estimates of the need for Affordable Housing

- 4.5.1. This section estimates the need for Affordable Housing which should be considered separately for Social/ Affordable Rented housing and affordable home ownership. The appropriate approach is taken based on the evidence available at Local Authority and NA scale.
- 4.5.2. A HEDNA (Housing and Economic Development Needs Assessment) was undertaken for Hastings and Rother in 2024¹¹. This study estimates the need for affordable housing in Hastings and Rother based on the approach outlined in the Planning

¹⁰Available at:

https://assets.publishing.service.gov.uk/media/67aafe8f3b41f783cca46251/NPPF_December_2024.pdf

¹¹ Available at:

https://www.hastings.gov.uk/content/evidence/Hastings_and_Rother_HEDNA_Update_2024_incl.Appendices_A-D.pdf

Practice Guidance to model net affordable housing needs for the period 2021 to 2044, based on relative costs and incomes. This analysis takes account of current unmet needs, newly arising needs and the current annual supply of affordable housing (including commitments).

- 4.5.3. The HEDNA identifies the need for 316 additional affordable rented homes and 116 affordable home ownership dwellings each year in Hastings, which suggests a balance of 73% affordable rent to 27% affordable home ownership.
- 4.5.4. When the HEDNA figures are pro-rated to West St Leonards based on its share of the population (7.5% if the borough's population according to the 2021 Census), this equates to 24 additional affordable rented homes and 9 affordable home ownership dwellings each year in West St Leonards, or 336 affordable rented dwellings and 126 affordable home ownership dwellings over the plan period, respectively.
- 4.5.5. As the NA is an urban area of the wider Hastings borough, the pro rating of Hastings level estimates to West St Leonards is likely to represent a reasonable estimate of localised need. This is because, typically, localised needs are higher in urban areas because of the existence of social and private rented housing, with households living in these tenures generating the majority of need for affordable housing.

4.6. Affordable Housing policies in Neighbourhood Plans

- 4.6.1. This section outlines a common Neighbourhood Plan policy level around the tenure mix of Affordable Housing, provides a recommendation and summarises relevant considerations.

Application of Local Plan policies

- 4.6.2. HBC's emerging policy on this subject (Policy SP2) states that, for greenfield sites, 40% of all new dwellings are expected to be delivered as Affordable Housing for developments of 10 homes or more. For brownfield sites, 25% of all new dwellings are expected to be delivered as Affordable Housing for developments of 20 homes or more. There is no minimum requirement for Affordable Housing provision for developments of less than 20 homes on brownfield sites and for developments of less than 10 homes on greenfield sites.
- 4.6.3. Given the urban nature of the NA (and therefore expectation that development has predominantly been on brownfield sites) and that Affordable Housing made up 29.1% of new housing in West St Leonards between April 2011 and March 2024 according to HBC completions figures, it suggests that these targets are usually met on sites in the NA; though it is difficult to say without knowing the full details of each development in terms of the scheme size or site type.
- 4.6.4. The overall proportion of housing that must be affordable is not an area of policy that a Neighbourhood Plan can usually influence, but it is worth emphasising that the HNA finds there to be robust evidence of need for Affordable Housing in the NA, and every effort should be made to maximise delivery where viable. Changing or influencing the overall proportion of housing that must be affordable is uncommon in Neighbourhood Plans and would demand a high standard of evidence to depart from the Local Plan.

If this is of interest, it should first be discussed with the LPA to ensure their support and to determine what additional evidence (e.g. about development viability) would be needed.

4.6.5. How the Affordable Housing that comes forward through mainstream development sites is broken down into specific tenures – such as the balance between rented tenures and routes to home ownership – is specified in Policy SP2 of the emerging Local Plan, which expects a tenure mix of 60% Social/Affordable Rent, 10% affordable ownership, with the remaining 30% determined through negotiation between the local authority and developer and comprising Affordable/Social Rent, shared ownership or any other affordable tenure including intermediate and low-cost homes (which could extend to First Homes).

Affordable Housing at Neighbourhood level

4.6.6. The HNA can provide more localised evidence and this may be used to support Neighbourhood Plan policies. This section suggests an Affordable Housing tenure mix that might be suitable for West St Leonards on the basis of identified housing need and a range of other considerations detailed in Appendix D.

4.6.7. The adopted Local Plan guideline mix appears to offer a suitable benchmark for West St Leonards because it prioritises the delivery of Social/Affordable Rent and also provides scope to deliver affordable home ownership products, which is in line with the conclusions of the recent HEDNA, whilst allowing for site specific negotiations between the local authority and developer.

4.6.8. The stated policy preference for Social/Affordable Rent over affordable ownership is reasonable in West St Leonards for a number of reasons:

- The HEDNA identifies a clear need for homes for Social/Affordable Rent over affordable ownership homes, at a ratio of approximately 73% to 27%.
- Given the sum of all allocations within the NA over the plan period amounts to 406 dwellings (market and affordable housing) and the HEDNA identifies the need for 336 affordable rented dwellings and 126 affordable owned dwellings over the plan period in NA, the actual delivery of Affordable Housing overall will be lower than the needs identified. In this context, Social/Affordable Rented housing is likely to be prioritised to support households in the most acute need.
- This approach also helps to address the persistent outstanding need for Social/Affordable Rented housing across Hastings as a whole.

4.6.9. The NPPF 2024 makes explicit reference of the need to set out the proportion of Social Rented homes needed as part of the Affordable Housing to be delivered in a local authority area (paragraph 64, NPPF)¹².

4.6.10. On balance, the relative need for Social Rented homes versus Affordable Rented homes is a complex area because of the interaction of benefits, rents and earnings.

¹²Available at:

https://assets.publishing.service.gov.uk/media/67aafe8f3b41f783cca46251/NPPF_December_2024.pdf

AECOM suggests that the local authority is best placed to assess what proportion of Affordable Housing should be provided as Social Rent, drawing on their waiting list data, housing benefit data, more detailed evidence in LHNAs and viability assessments. If West St Leonards Neighbourhood Forum wishes to develop localised policy in this area, this will be best achieved through liaison with the LPA (and local housing officers) as well as local registered providers.

4.6.11. Where the West St Leonards Neighbourhood Forum wish to develop policy that deviates from that outlined in the Local Plan – either by differing from the headline split between renting and ownership or by specifying a greater level of detail around sub-tenures, it is important that they liaise with HBC to determine what additional evidence (notably about development viability) may be needed, and to ensure that departures from the local policy context have their support.

4.7. Conclusions- Affordability and Affordable Housing

Current tenure profile

4.7.1. Home ownership is the dominant tenure in West St Leonards (65.6%), sitting above both the average of Hastings (56.6%) and England (61.3%) more widely. Of the remaining non-owning households, private renting is the most common tenure, with a comparatively low number of people who rent from a social landlord in West St Leonards (6.2%), compared to Hastings (14.3%) and England (17.1%), where it is almost three times more common.

4.7.2. That said, the most popular forms of tenure, owned and private rented, have actually both decreased in number since 2011. This is most likely due to a proportion of homes switching to second homes or holiday lets. Although still making up a relatively small proportion of the housing stock, shared ownership has risen the most (15.8%) and the number of those with a social landlord has increased by 7.8%.

Affordability

4.7.3. House prices in the NA have followed a general upward trajectory despite some year-on-year fluctuations. The current median house price (middle number when arranged from lowest to highest) is £300,000, which is a growth of 85.2% since 2014. The lower quartile house price, which is typically taken as a good representation of 'entry-level' housing, is around 76% of the median price, meaning there is limited variety at the lower end of the market and that truly entry-level properties infrequently come up for sale.

4.7.4. It is worth noting that house prices in the NA are consistently more expensive than those in the surrounding local authority. West St Leonards' mean, median and lower quartile house prices in 2023 were 6.3%, 11.7% and 23.3% more expensive respectively, when compared to Hastings' homes.

4.7.5. AECOM has estimated the annual income required to afford various tenures of housing in West St Leonards – each of which is explained in detail in Appendix C. These thresholds are compared to incomes to determine which options are the most appropriate for local people going forward. The average household income in the NA

area was £42,500 in 2020 and the lower quartile household income for Hastings was £16,888 in 2023.

- 4.7.6. It was found that local households on average incomes are unable to access even entry-level homes unless they have the advantage of a very large deposit. The median house price would require an annual income of just under double the current average. Private renting is more affordable but is generally only accessible to those on above average incomes. A broader challenge in relation to private renting is that, though potentially cheaper, there are still too few properties at an affordable price regularly available to make this a reliable option for lower income households.
- 4.7.7. Subsidised routes to home ownership like First Homes and Shared Ownership are intended to target people who can afford to rent but not to buy. In West St Leonards, there is a relatively large gap between the income needed to afford to rent (£45,400) and to buy (£58,693), so many may benefit from these products.
- 4.7.8. In Neighbourhood Plans, the discount on Discount Market Sale Homes can be set at 20% and for First Homes can be set at 30%, 40% or 50%. In West St Leonards, neither Discount Market Sale Homes, nor the minimum First Homes 30% discount or the enhanced 40% discount, appear to be sufficiently affordable to average income households. Only the 50% discount level appears just affordable to average income households, and no version of this product is close to being affordable to lower earning households. First-time buyers in the former group are the more realistic target market for First Homes, so this analysis suggests that there is a need to exceed the minimum discount level of 30% in West St Leonards, ideally to 50%, while acknowledging that even this will primarily serve average income households.
- 4.7.9. Although a 50% discount would make a more meaningful difference, this might have implications on the viability of Affordable Housing more widely, so the other discount levels should still be considered; or an alternative approach is to reduce the equivalent market value of First Homes by reducing their size or through other means.
- 4.7.10. Affordable Rented housing appears generally affordable to households with two lower earners depending on their household size (average earning households are unlikely to be eligible). However, households with a single lower earner appear unable to afford any of the tenures considered other than Socially Rented units. Many such individuals will, if unable to secure a social rented dwelling require additional subsidy through Housing Benefit to access housing.
- 4.7.11. The evidence in this chapter indicates a clear divide in housing affordability in West St Leonards, with higher earners and those already on the housing ladder potentially able to buy their own homes, average income households able to afford some alternative options (such as entry-level market rent and affordable routes to ownership) and lower earners only able to access Social Rented housing on the basis of their income from earnings. This suggests that the Affordable Rented sector, and Social Rent in particular, performs a vital function in West St Leonards as the only option for a large segment of those in the most acute need.

The need for Affordable Housing

- 4.7.12. The 2024 Hastings and Rother HEDNA identifies the need for 316 additional affordable rented homes and 116 affordable home ownership dwellings each year in Hastings, which is approximately at a rate of 73% affordable home ownership to 27% affordable rent.
- 4.7.13. When the HEDNA figures are pro-rated to West St Leonards based on its share of the population (7.5% of the borough's population according to the 2021 Census), this equates to 24 additional affordable rented homes and 9 affordable home ownership dwellings each year in West St Leonards, or 336 affordable rented dwellings and 126 affordable owned dwellings over the plan period, respectively.

Affordable Housing policy

- 4.7.14. Affordable Housing is typically provided and made financially viable by its inclusion as a proportion of larger market developments, as guided by Local Plan policy. However, if the community wishes to boost the supply of Affordable Housing, there are other, more proactive routes available for its provision. For example, using neighbourhood development orders, identifying exception sites or developing community land trusts are all ways of boosting the supply of Affordable Housing.
- 4.7.15. HBC's emerging policy on this subject (Policy SP2) states that, for greenfield sites, 40% of all new dwellings are expected to be delivered as Affordable Housing for developments of 10 homes or more. For brownfield sites, 25% of all new dwellings are expected to be delivered as Affordable Housing for developments of 20 homes or more. There is no minimum requirement for Affordable Housing provision for developments of less than 20 homes on brownfield sites and for developments of less than 10 homes on greenfield sites.
- 4.7.16. How this is broken down into specific tenures - such as the balance between rented tenures and routes to home ownership - is specified in Policy SP2 of the emerging Local Plan, which expects a tenure mix of 60% Social/Affordable Rent, 10% affordable ownership, with the remaining 30% determined through negotiation between the local authority and developer and comprising Affordable/Social Rent, shared ownership or any other affordable tenure including intermediate and low-cost homes (which could extend to First Homes).
- 4.7.17. AECOM recommends that the emerging Local Plan's guideline mix appears to offer a suitable benchmark for West St Leonards because it prioritises the delivery of Social/Affordable Rent and also provides scope to deliver affordable home ownership products, which is in line with the conclusions of the recent HEDNA, whilst allowing for site specific negotiations between the local authority and developer.
- 4.7.18. Table 4-8 summarises West St Leonard's position with regards to the expected delivery of Affordable Housing, and how this might ideally be apportioned among sub-categories of tenure to meet local needs over the Neighbourhood Plan period. This exercise simply applies the figure of the sum of the draft allocations within the NA to the Local Plan policy expectation, and shows the quantities of Affordable Housing for rent and sale that would be delivered if the tenure mix proposed in this HNA were to

be rigidly enforced. Here a rate of 73% Affordable/Social Rent to 27% affordable home ownership is assumed, in line with the ratio proposed in the HEDNA, though in reality if the approach proposed in the Local Plan is also used here, this could vary based on the site-by-site negotiations between developers and the HBC. This assessment gives no consideration of scheme size or site type however it is reasonable to assume that the majority of sites are brownfield and therefore would be subject to 25% affordable housing. This therefore gives the maximum Affordable Housing figure that could be delivered, based on the sum of the draft allocations within the NA.

4.7.19. In this sense it is hypothetical, and the outcomes in practice may differ, either as a result of measures taken in the neighbourhood plan (e.g. if the group plans for more housing (and therefore more Affordable Housing) than the local plan, if the level of actual housing delivered increases (as is likely), if the group decides to influence the tenure mix in other ways, or as a result of site-specific constraints.

Table 4-8: Estimated delivery of Affordable Housing in West St Leonards

Step in Estimation		Expected delivery
A	Sum of allocations in emerging Local Plan	408
B	Affordable Housing quota (%) in emerging Local Plan (brownfield rate)	25%
C	Potential total Affordable Housing in NA (A x B)	102
D	Rented % (e.g. social/ Affordable Rented)	73%
E	Rented number (C x D)	74
F	Affordable home ownership % (e.g. Shared Ownership, Discounted Market Sale, First Homes, Rent to Buy)	27%
G	Affordable home ownership number (C x F)	28

Source: AECOM estimate based on LPA's Affordable Housing policies, AECOM's indicative tenure mix

5. Housing Mix: Type and Size

5.1. Introduction

- 5.1.1. It is common for neighbourhood plans to include policies that influence what form new housing should take in terms of the type and size of new homes. This requires evidence of what local households need.
- 5.1.2. This can be done using statistics to identify relevant trends and potential gaps in the market. That is the focus of this section of the HNA. The evidence gathered here can be used to justify planning policies either on its own or in combination with survey results expressing the specific aspirations of local residents. It will also build up a picture of the population and existing range of homes that may provide useful context for the neighbourhood plan.
- 5.1.3. This section has three aims, each given its own sub-section:
- To establish what **mix** of housing exists in the NA at present;
 - To describe characteristics of the local **population** that are relevant to housing need; and
 - To look to the **future**, considering how the population is likely to evolve and what mix of homes would be most appropriate to build.
- 5.1.4. It is important to keep in mind that housing need is not an exact science. To move from a set of facts about the population to an ideal mix of homes requires making assumptions. For example, there are clear patterns about what size of home households tend to live in at different stages of life. However, a variety of other reasons sit behind their housing choices that are less easy to predict, including wealth, accessibility requirements and personal preferences. Some trends can also change rapidly over time, such as the increasing preference for home working in some sectors of the economy.
- 5.1.5. The analysis and conclusions provided in this section are therefore not definitive. Rather, they are what the data suggest future needs will look like based on current trends. This is sufficient for justifying planning policies, but it is also appropriate to take into account other factors and evidence where appropriate.

Definitions

- **Dwelling type:** whether a home is detached, semi-detached, terraced, a flat, bungalow or other type. Which a household chooses to occupy tends to be more about wealth and preference than a specific need.
- **Dwelling size:** how many rooms or bedrooms a home contains. While this could also mean floor area or number of storeys, the number of bedrooms is most reliably recorded in housing statistics. Bedroom numbers are also closely linked to family size and life stage.

- **Household:** a unit of people who live together, commonly a family, couple or single person. Not all dwellings contain a household, including properties that are vacant and second homes, so the number of dwellings and the number of households in an area is usually different.
- **Household composition:** the specific combination of adults and children who form a household. The Census offers a number of categories, for example distinguishing between families with children who are dependent or non-dependent (i.e. adults). 'Other' households in the Census include house-sharers, groups of students, and multi-family households.
- **Household life stage:** the age of the lead member of a household – usually the oldest adult, or what used to be called the 'head of household'. Life stage is correlated with dwelling size as well as wealth.
- **Housing mix:** the range of home sizes and types in an area.
- **Over- and under-occupancy:** the degree to which the size and composition of a household lines up with the number of bedrooms in their home. If there are more bedrooms than the household would be expected to need, the home is considered under-occupied, and vice versa.

5.2. The current housing mix

5.2.1. This section establishes the current housing mix of West St Leonards, highlighting recent changes to it and comparing the mix to wider averages.

Dwelling type

5.2.2. Table 5-1 below shows that while West St Leonards is relatively consistent with the pattern observed in its comparator areas, there are some deviations. The NA has a lower proportion of detached homes (17.6%) and terraced homes (17.0%) than Hastings and England, but has substantially more semi-detached homes (36.5%) than Hastings (21.8%) and slightly more than England (31.5%). Semi-detached homes therefore make up the dominant dwelling type within the NA.

5.2.3. Flats represent the second most prevalent housing type. Despite a lower proportion than Hastings overall, their relatively high prevalence in both areas reflects the urbanised characteristics of West St Leonards and Hastings when compared to the whole of England. The plentiful supply of flats is beneficial for smaller and younger households and those looking to rent, whilst also generally providing more options for those with affordability issues. Equally, however, terraced homes are more likely to be affordable and the relative lack of these homes in the NA could present some issues in this regard. Nonetheless, West St Leonards' overall dwelling type mix is relatively well balanced, though this is dependent on the local population's requirements and life stage demands, as will be explored later in this chapter.

5.2.4. The Census divides dwellings into a standard set of categories that does not include bungalows: a detached bungalow will be counted only as a detached house, and so forth. It is therefore useful to refer to Valuation Office Agency (VOA) data, which

separates bungalows out as a separate category. VOA data suggests that 9.8% of homes were bungalows in the NA in 2023. This is above Hastings' and England's figures of 7.7% and 9.1% respectively. Bungalows tend to appeal to older households and those with mobility limitations, so this element of the housing stock may be linked to the age profile of the population, considered later in this chapter. However, it is worth noting that most bungalows in the NA, such as those on Harley Shute Road, which rises steeply from Bexhill Road, are accessed via steep slopes and are generally less suitable for the elderly or those with mobility limitations, so the link between these groups and bungalows may be less relevant.

Table 5-1: Accommodation type, West St Leonards and comparator geographies, 2021

Type	West St Leonards	Hastings	England
Detached	17.6%	19.1%	22.9%
Semi-detached	36.5%	21.8%	31.5%
Terrace	17.0%	22.6%	23.0%
Flat	28.9%	36.2%	22.2%

Source: Census 2021, AECOM Calculations

5.2.5. Unfortunately, a discrepancy in how Census data is recorded for this metric means that it is not possible to meaningfully compare the 2021 and 2011 type mix at this scale. Nonetheless, using the data as it is presented to us, it would suggest that there have been a large decrease in the number of flats within the NA, whilst other accommodation types have remained relatively static. This could partially be explained by a change of use from flats in converted houses being changed back into houses, as has happened along Marina and Bexhill Road. However, it should be noted that the losses in various categories are more likely to reflect the data discrepancy than actual demolitions. This is because 2011 data is based on dwellings and 2021 data is based on households (and therefore excludes dwellings not occupied by households). This could indicate that within the NA, some of the smaller dwellings have switched to second homes / lets, as it is unlikely the dwellings have been demolished – so they are not counted because no household is living in them. This would make logical sense that the number of flats and terraces have fallen most, given they are likely the most attractive accommodation type as using for second homes or lets.

Table 5-2: Accommodation type, West St Leonards, 2011-2021

Type	2011	%	2021	%	% Change 2011-2021
Detached	507	16.3%	510	17.6%	0.6%
Semi-detached	1,058	34.0%	1,058	36.5%	0.0%
Terrace	502	16.1%	493	17.0%	-1.8%
Flat	1,075	34.5%	837	28.9%	-22.1%
Total	3,116	-	2,900	-	-6.9%

Source: ONS 2021 and 2011, AECOM Calculations

5.2.6. When net completions since 2021 are factored in, a more useful picture emerges, as outlined in Table 5-3. The major and ongoing development in the NA at the former St

Leonards Academy Darwell Campus is for 210 dwellings (HS/DS/21/00570 & later variations HS/FA/22/00999). However, as construction is ongoing it is difficult to determine the accommodation type of the completed dwellings. Table 5-3 therefore presents two columns, one without any of the commitments from this development and one that encapsulates all dwellings for the entirety of the development when it will be completed. Here it can be seen that, of known completions, terraced and detached homes have been the most common. However, once the development at the former St Leonards Academy Darwell Campus is factored in, the biggest increases come in the form of semi-detached homes, followed by detached.

Table 5-3: Accommodation type, West St Leonards, net completions since 2021.

Type	Excluding HS/DS/21/00570		Including HS/DS/21/00570	
	Amount	% of completions	Amount	% of completions
Detached	7	33.3%	85	36.8%
Semi-detached	2	9.5%	117	50.6%
Terrace	8	38.1%	8	3.5%
Flat	4	19.0%	21	9.1%

Source: Hastings Borough Council

Dwelling size

5.2.7. Table 5-4 below presents the current housing mix in terms of size compared to the wider local authority and country. It shows that West St Leonards has a generally similar size mix to both comparators. The main difference is in the number of 1 bed homes, where there are fewer in the NA compared to both the local authority and country. This could present affordability issues in the NA as these homes tend to be the least expensive. Both West St Leonards and Hastings have fewer 4+ bed homes than England, which is likely due to the more urbanised nature of both areas, as opposed to other parts of England, which may include larger country homes in comparison to the denser settlement pattern observed in these urban areas.

Table 5-4: Dwelling size (bedrooms), West St Leonards and comparator geographies, 2021

Number of bedrooms	West St Leonard	Hastings	England
1	9.5%	16.8%	11.6%
2	34.0%	32.0%	27.3%
3	41.4%	34.4%	40.0%
4+	15.1%	16.8%	21.1%

Source: Census 2021, AECOM Calculations

5.2.8. Table 5-5 shows the changes in size mix in West St Leonards in the decade following 2011. As noted above, a discrepancy in how Census data is recorded for this metric means that it is not possible to meaningfully compare the 2021 and 2011 type mix at this scale; these Census figures should therefore be viewed with caution. Treating the data as such, it would appear there has been a large decrease in 1 bedroom dwellings, which is likely to correspond with the decrease in flats noted in Table 5-2 above. However, this could reflect a fall in the number of households occupying these

properties and their use as second homes/ holiday lets, rather than a loss of the dwellings themselves.

Table 5-5: Dwelling size (bedrooms), West St Leonards, 2011-2021

Number of bedrooms	2011	%	2021	%	% Change 2011-2021
1	353	11.7%	275	9.5%	-22.1%
2	1,075	35.7%	985	34.0%	-8.4%
3	1,151	38.2%	1,199	41.4%	4.2%
4+	433	14.4%	438	15.1%	1.2%
Total	3,012	-	2,897	-	-3.8%

Source: ONS 2021 and 2011, AECOM Calculations

5.2.9. It is useful to consider how completions since 2021 and future commitments as of January 2025 are likely to change the dwelling stock over time. Here we can see that 4+ bed homes have the highest rate of change based on net completions and commitments against 2021 stock, alongside moderate increases for 1, 2 and 3 bed homes. Note that this is based on existing net completions and commitments and therefore this trend may change in the future if the WSLF introduced policy to change the trajectory of development trends.

Table 5-5: Dwelling size (bedrooms), West St Leonards, 2021 Census dwelling stock compared to 2021 stock plus net completions since and future commitments as of January 2025.

Number of bedrooms	2021	%	2021 stock + net completions + commitments (as of Jan 2025)	%	% Change 2021- 2025
1	275	9.5%	312	9.8%	13.45%
2	985	34.0%	1,070	33.5%	8.63%
3	1,199	41.4%	1,294	40.5%	7.92%
4+	438	15.1%	517	16.2%	18.04%
Total	2,987	-	3,193	-	10.22%

5.3. Population characteristics

5.3.1. This section examines key characteristics of the local population that have a bearing on what housing might be needed in future years. Where available, recent data is used. However, for some information it is necessary to fall back on the 2011 Census.

Age

5.3.2. Table 5-6 shows the most recent age structure of the NA population, alongside 2011 Census figures. This reveals a trend toward ageing in West St Leonards with the largest rise in the 65-84 age group, rising by almost a third. The biggest fall can be seen in the 15-24 age group, followed by the 25-44 age group, suggesting that West St Leonards is struggling to retain or attract younger working age people. Reversing

this trend, if an objective shared by the community, could inform planning policies to promote development aimed at that demographic.

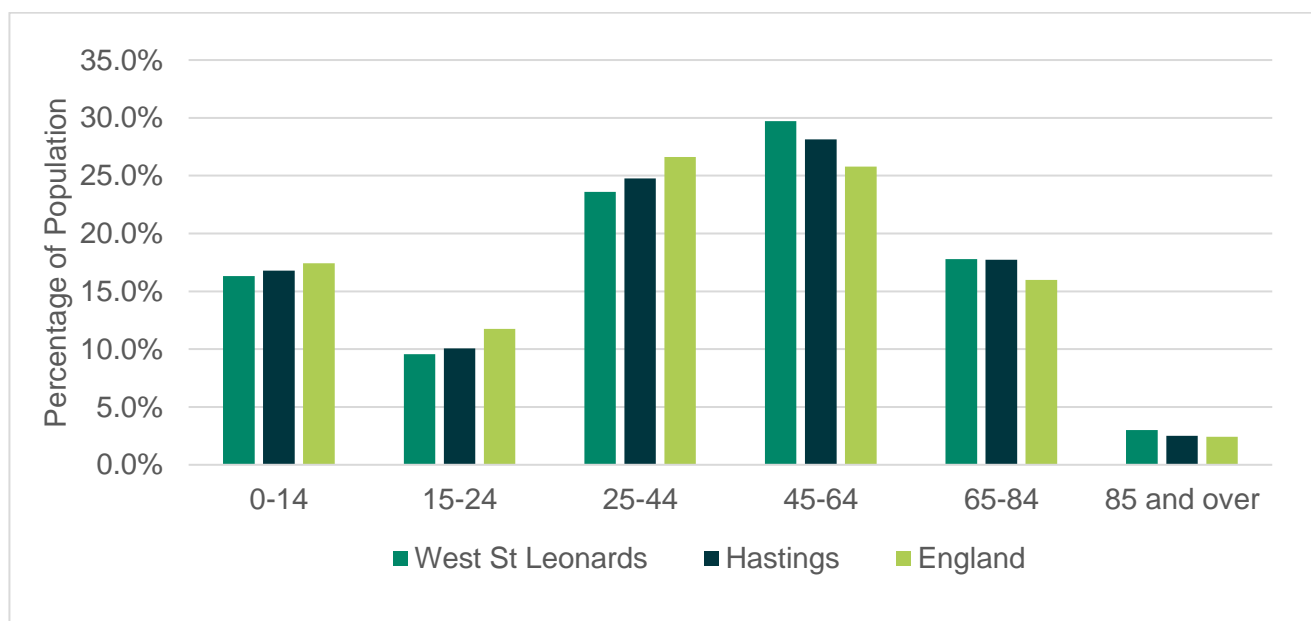
Table 5-6: Age structure of West St Leonards, 2011 and 2021

Age group	2011 (Census)		2021 (Census)		Change
0-14	1,058	15.6%	1,112	16.3%	5.1%
15-24	851	12.6%	651	9.6%	-23.5%
25-44	1,767	26.1%	1,609	23.6%	-8.9%
45-64	1,956	28.9%	2,026	29.7%	3.6%
65-84	923	13.6%	1,212	17.8%	31.3%
85 and over	212	3.1%	205	3.0%	-3.3%
Total	6,767	100.0%	6,815	100.0%	0.7%

Source: ONS 2011, ONS 2021, AECOM Calculations

5.3.3. For context, it is useful to look at the NA population structure alongside that of the borough and country. Figure 5-1 (using 2021 Census data) shows that West St Leonards population is older than its comparators. West St Leonards has a higher proportion of its population in all age categories older than and including 45-64, while conversely having a lower proportion than both Hastings and England in all age categories younger than 45-64. As the population continues to evolve to 2039 it is likely that the large 45-64 group in particular will enter the 65-84 cohort, and the 65-84 cohort will enter the 85 and over cohort, both points at which people’s housing needs start to change – for example, requiring accessibility adaptations or additional care/support, as well reinforcing the need for a supply of smaller 1-2 bedroom units for those who wish to downsize.

Figure 5-1: Age structure in West St Leonards, 2021



Source: ONS 2021, AECOM Calculations

Household composition and occupancy

5.3.4. Household composition (the combination and relationships of adults and children in a dwelling) is an important factor in the kinds of housing needed over the

Neighbourhood Plan period. Table 5-7 shows that generally, West St Leonards household composition is broadly similar to that of Hastings and England. However, in comparing the specifics, the NA has a relatively lower level of single-person households (31.8%) compared to the broader Hastings area (35.7%), but a higher proportion than England (30.1%) overall. Similarly, the proportion of one-person households aged 66 and over in West St Leonards (13.3%) is slightly below Hastings (14.9%) but above England (12.8%). Families with no children (18.9%) are more common in West St Leonards than in both Hastings (16.1%) and England (16.8%), potentially reflecting a demographic pattern of couples or ‘empty-nesters’ settling in the area. Finally, both the NA (9.7%) and LA (9.6%) have a lower rate of families with dependent children when compared to England (10.5%), which has implications on the need for housing, where there is less of a need for larger homes.

5.3.5. Note that non-dependent children refer to households in which adult children are living at home, or which students still call their primary residence despite living for most of the year near to university. A marked increase in this category can be taken to indicate the relative unaffordability of entry-level homes, where young people are financially unable to move out and form their own households. It is interesting to observe that this category grew by 10.1% between 2011 and 2021 in the NA, much faster than the national average of just 3.5%. Though it should be noted that in the wider Hastings area, this category grew by 22.7% over this period, suggesting the relative unaffordability of entry-level homes for young people is even worse in other areas of Hastings.

Table 5-7: Household composition, West St Leonards, 2021

Household composition		West St Leonards	Hastings	England
One person household	Total	31.8%	35.7%	30.1%
	Aged 66 and over	13.3%	14.9%	12.8%
	Other	18.6%	20.8%	17.3%
One family only	Total	61.7%	57.5%	63.1%
	All aged 66 and over	8.3%	8.0%	9.2%
	With no children	18.9%	16.1%	16.8%
	With dependent children	23.9%	23.3%	25.8%
	With non-dependent children ¹³	9.7%	9.6%	10.5%
Other household types	Total	6.5%	6.8%	6.9%

Source: ONS 2021, AECOM Calculations

5.3.6. The tendency of households to over- or under-occupy their homes is another relevant consideration to the future size needs of the NA. A household is considered to under-occupy their home when there are more bedrooms in their home than a family of their

¹³ Refers to households containing children who are older than 18 e.g students or young working people living at home.

size and composition would normally be expected to need. This is expressed as an occupancy rating of +1 or +2, indicating that there is one surplus bedroom or at least two surplus bedrooms (respectively). Over-occupancy works in the same way, with a rating of -1 indicating at least one bedroom too few.

5.3.7. The 2021 Census data presented in Table 5-8 shows that just under three quarters of the population have at least one more bedroom than they would be expected to need, and around a third have two more. This is particularly the case for couples aged over 66 and families without children. While not uncommon, this might suggest that the NA's larger housing is not necessarily being occupied by households with the most family members, but by the people with the most wealth or by older people who have not chosen or been able to move to smaller properties.

5.3.8. 3.0% of households are over occupied, which unsurprisingly, tends to be made up of family households with children. This is important to note as it gives an indication of acute need, and given it is highest for households with dependent children, it demonstrates a number of young people in the NA are living in overcrowded homes.

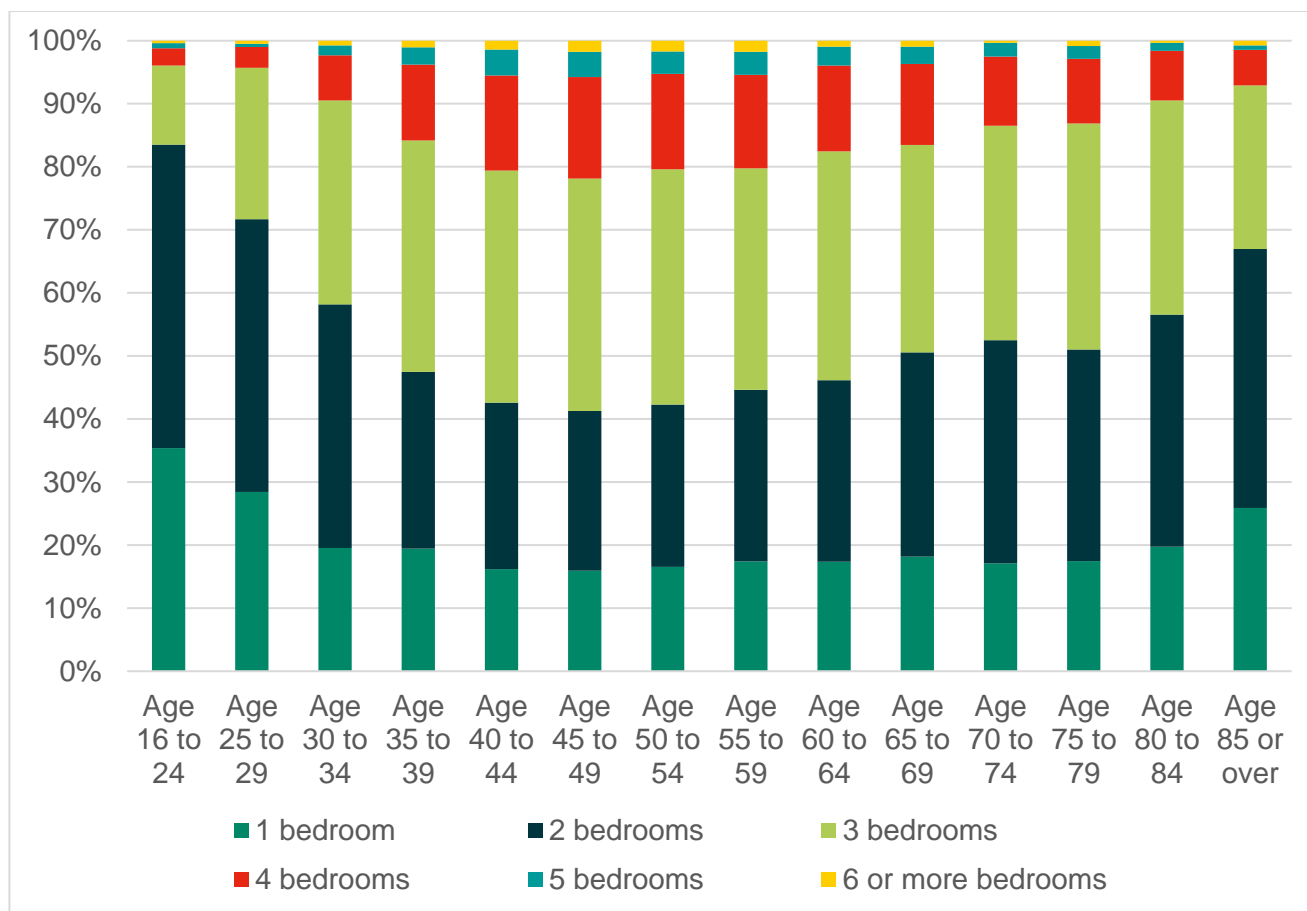
Table 5-8: Occupancy rating by age in West St Leonards, 2021

Household type	+2 rating	+1 rating	0 rating	-1 rating
Family 66+	61.8%	32.0%	6.2%	0.0%
Single person 66+	41.9%	41.9%	16.2%	0.0%
Family under 66 - no children	54.8%	39.8%	5.4%	0.0%
Family under 66 - dependent children	9.9%	38.0%	44.4%	7.6%
Family under 66 - adult children	18.5%	43.7%	35.7%	2.1%
Single person under 66	27.3%	43.7%	29.0%	0.0%
All households	31.2%	39.6%	26.3%	3.0%

Source: Census 2021, AECOM Calculations

5.3.9. As noted in the introduction to this chapter, the life stage of households is strongly correlated with the size of home they tend to occupy. Figure 5-2 sets out this relationship for Hastings in 2011 (because this data is not available at smaller scales). The graph shows how the youngest households tend to occupy the smallest dwellings, before rapidly taking up larger homes as their families expand, and then more gradually downsizing to smaller homes again as they age.

Figure 5-2: Age of household reference person by dwelling size in Hastings, 2011



Source: ONS 2011, AECOM Calculations

5.4. Future population and size needs

5.4.1. This section projects the future age profile of the population in West St Leonards at the end of the Neighbourhood Plan period and then estimates the mix of dwelling sizes they may need.

Age

5.4.2. The result of applying Local Authority level household projections to the age profile of West St Leonards households in 2011 is shown in Table 5-9. This makes clear that population growth can be expected to be driven by the oldest households, with the 65+ group expected to increase the most, by 70% and to take over as the most populous age group, pushing 35 to 54 into second. All age groups below 55 are expected to decrease, whilst all age groups above 54 are expected to grow in size. This is a simplistic projection based on trends at a wider scale. In practice the rate of ageing may be sharper than indicated here, although successful efforts to attract and retain younger households could significantly disrupt the natural pattern of ageing in West St Leonards – such as through the promotion of more affordable and smaller sized homes that appeal more to younger age groups.

Table 5-9: Projected age of households, West St Leonards, 2011 - 2039

Year	24 and under	25 to 34	35 to 54	55 to 64	65 and over
2011	90	380	1,199	623	720
2039	58	350	1,080	725	1,222
% change 2011-2039	-36%	-8%	-10%	16%	70%

Source: AECOM Calculations

- 5.4.3. The demographic change discussed above can be translated into an ideal mix of dwelling sizes. This is achieved through a model that maps the dwelling size preferences by life stage shown earlier (in Figure 5-2) onto the projected age profile for the NA in Table 5-9 immediately above. The resulting 'ideal' future mix of dwelling sizes can then be compared to the current stock of housing to identify how future development might best fill the gaps.
- 5.4.4. This approach has limitations, in that it embeds existing size preferences and does not anticipate changes in what people want from their homes. As such, it is appropriate for the results to be taken as a baseline scenario – what would occur if current trends persisted. It may well be the intention of the community to intervene to produce a different outcome more in line with their interpretation of emerging trends and their place- and community-shaping objectives. Layering these factors on top of the indicative picture provided by this model is appropriate for the purpose of drafting neighbourhood plan policies.
- 5.4.5. The result of this exercise is presented in Table 5-10. The model suggests that future housing delivery should focus predominantly on 1 bedroom homes, with some 2 bedroom homes alongside. Smaller properties tend to appeal to younger people or some downsizing older households, and some young families, both offering greater affordability than larger homes. It is also of note that, as of 2021, West St Leonards had a lower proportion of 1 bedroom homes compared to both Hastings and England, so the recommendation proposed in the model would help address this imbalance.
- 5.4.6. This modelling exercise suggests there is no need for additional 3 and 4+ bedroom homes and reflects the demographic projections and the share of these homes in the existing stock. However, this does not imply that no larger properties should be developed, since there may be good policy reasons to provide some of these homes. The key point to take from this modelling exercise is that the evidence suggests some prioritisation of smaller properties in new development would help to widen choice locally.

Table 5-10: Suggested dwelling size mix to 2039, West St Leonards

Number of bedrooms	Current mix (2021)	Suggested mix 2039	Balance of new housing to reach suggested mix	Indicative policy range
1	9.5%	19.6%	78.1%	65-75%
2	34.0%	32.9%	21.9%	15-25%
3	41.4%	35.2%	0.0%	0-10%
4+	15.1%	12.2%	0.0%	0-10%

Source: AECOM Calculations

5.4.7. The following points sense-check the results of the model against other evidence and suggest ways to interpret them when thinking about policy options.

- As noted above, the geography that is used to capture the dwelling size preferences of households at different stages of life (Hastings as a whole) can skew the result of models like this where there are significant differences between the housing mix of the geography in question and that of the NA. For example, 1 bedroom homes make up a considerably smaller proportion of all dwellings in West St Leonards than they do in Hastings.
- The NA also sits within the borough of Hastings and wider housing market area and contributes to the mix of housing available within these areas. As such, apparent biases within the housing stock at the neighbourhood level – in the case of West St Leonards a mix which has a greater share of larger properties than in Hastings as a whole – provides choice within the wider market area. Conversely, smaller properties in the centre of Hastings provide a counter balance to West St Leonards’ stock. At the neighbourhood level, it is not necessarily essential or desirable to provide an equal range of different types and size of dwellings since these may be provided in other parts of the housing market area.
- These reasons aside, the key implication here is that smaller and mid-sized properties should be the focus for future development in order to widen choice at the neighbourhood level. Recent completions are likely to have reinforced the existing type and size of homes in the NA, so the addition of some smaller properties may help to widen choice.
- The most recent HEDNA (2024) for Hastings and Rother proposes the below housing mix for Hastings:
 - 1 bedroom 20-25%
 - 2 bedroom 30-35%
 - 3 bedroom 30-40%
 - 4 bedroom 10-15%

These suggestions may justify rebalancing the HNA recommendations to a more balanced approach, most notably reducing the levels of 1 bedroom homes, if

this is in line with the objectives of the community. To avoid being too prescriptive, one potential approach would be to combine the size categories and allow for greater flexibility between them, for example by requiring a certain proportion of new homes to have 1-2 bedrooms rather than specifying percentages for each.

- The preceding chapter found that affordability is a serious and worsening challenge in the NA. While the provision of Affordable Housing (subsidised tenure products) is one way to combat this, another is to ensure that homes come forward which are of an appropriate size, type and density for local residents' budgets.
- Continuing to provide smaller homes with fewer bedrooms would help to address this situation, although it should be considered whether such a dominance of new 1 bedroom homes is compatible with the area's character and current density.
- To best meet the needs of the growing cohort of older households expected to be present by the end of the Neighbourhood Plan period, it should also be considered whether the existing options are well tailored to older people's requirements in terms of space, flexibility, quality, location and accessibility.
- Variety should be sought within the mid-sized homes that are built in future to attract both newly forming households on lower budgets and older households with equity from their existing larger homes. While the number of bedrooms required may be similar, other preferences and levels of purchasing power could be very different. Facilitating downsizing among older households may also release those larger homes for use by families who need more bedrooms if the existing stock of larger homes is sufficiently affordable.

Tenure

- 5.4.8. The recommendation discussed immediately above applies to all housing in the NA over the Neighbourhood Plan period. This is considered proportionate for devising policy at neighbourhood scale. However, in practice different size mixes may be appropriate for market housing and Affordable Housing. While this distinction may not be appropriate to make in Neighbourhood Plan policy, since Local Authorities tend to define the precise mix of Affordable Housing required on applicable sites, it is worth thinking through the factors at play.
- 5.4.9. Generally speaking, the size mix estimated as needed within affordable tenures, particularly Affordable and Social rent, is smaller than the size mix of market housing. This is because under local authority allocation policies, which reflect the shortage of Affordable Housing overall, households are only eligible for the minimum sized home that meets their needs. This means that single people and couples will generally only be entitled to one bedroom properties. Families with two young children are only likely to be eligible for two bedroom properties (with the expectation that children share rooms until a certain age). In contrast, people buying their own homes tend to want more space than they technically 'need', such as spare rooms for guests, home working or other uses. This fact is established in the data on under-occupancy presented earlier in this chapter.

5.4.10. There are three key sources of information for thinking through the size needs of different categories. These are:

- The relevant SHMA (Strategic Housing Market Assessment) or LHNA or HEDNA for the Local Authority, which will (usually) set out the projected need by size within each tenure over the long-term.
- The waiting list for Affordable Rented housing, kept by the Local Authority. This provides a more current snapshot of the size needs of applicant households. As this changes over time, individual planning applications can be decided in ways that meet evolving needs. In this case, however, Hastings data for applicant households on the Affordable Housing waiting list does not include data on the specific sizes of homes that have been requested.
- The pattern of lettings within the existing stock of Social/Affordable Rented housing. Whilst there may be more households eligible for smaller properties, the availability of larger properties is often severely limited which puts pressure on these larger homes and often results in long waits for those needing larger family sized accommodation.
- Any relevant household survey or consultation work in the NA can also highlight any specific gaps in the market within particular segments of the population. However, as preparation of the Neighbourhood Plan is currently at an early stage, this has not yet been carried out.

5.4.11. To summarise, the overall size mix recommendation presented above applies generally to new housing in the NA. Within this mix, Affordable Housing might require a greater weighting towards smaller sizes to reflect the eligibility of those on the waiting list, while market homes focus on smaller- and mid-sized homes with some larger options. That said, there is often acute pressure on larger Social/Affordable Rented homes because their availability through lettings is often limited. It is not necessary (and is potentially not appropriate) for Neighbourhood Plans to be prescriptive about the size mix within different tenures, but a range of data sources exist that indicate a direction of travel, which Local Planning Authorities will draw upon when determining applications, and which it is possible for the neighbourhood planners to monitor.

Type

5.4.12. Planning policy also tends to be less prescriptive about the mix of dwelling types that are needed than the mix of home sizes. This is because the choice to occupy a terraced rather than a detached home, for example, is primarily a matter of wealth, personal preference, and the amount of outdoor space or other features sought than 'need' in the strict sense. This stands in contrast to the matter of dwelling size, where it can be more clearly established that a household with a certain number of members, closely correlated with age, requires a particular number of bedrooms.

5.4.13. The key distinctions when it comes to dwelling type are between flats and houses and, to a lesser extent, bungalows, each of which tend to appeal to occupants with

different life circumstances. However, it remains difficult to generalise about this, particularly when drawing on demographic evidence.

- 5.4.14. The benefits of delivering a certain blend of dwelling types are more closely related to affordability, which is clearly established as an issue in West St Leonards, and which favours more dense options (e.g. terraces and flats). This imperative to improve affordability is often in conflict with matters of character, which in rural areas tend to favour lower density options that blend in with the existing built environment. This is particularly relevant in the case of flats, a large block of which may not be a welcome proposition in the NA. That said, it is possible to deliver flats in the form of low-rise maisonettes that resemble terraces from street level, which can counter this issue.
- 5.4.15. In summary, there is a balance to be struck between, on the one hand, improving affordability and choice in the market by encouraging flats and terraces, and, on the other hand, preserving the distinctive character and other features that residents like about the NA today. How far the Neighbourhood Plan should guide on this issue, and in what direction, is a policy decision for the West St Leonards Neighbourhood Forum and community to consider.

5.5. Conclusions- Type and Size

The current housing mix

- 5.5.1. The current dwelling mix in West St Leonards is not dominated by any single dwelling type, although semi-detached homes are the most common form of housing in the NA and exist at a much higher rate (36.5%) than is generally seen across the wider area of Hastings, and above the national average too. Flats also make up a considerable portion of West St Leonard's housing stock (28.9%), comfortably above the national average of 22.2%, reflecting the urban nature of the NA. It is interesting to note however, that the number of flats in the NA is still below the average seen across Hastings more widely, at 36.2%, with a high levels of flats in the local authority. The availability of flats can be seen as a positive in terms of serving smaller households who are looking to rent in particular, which tend to be younger populations. Detached and terraced homes sit at a more modest percentage of 17.6% and 17% respectively; a lower rate of both types of housing when compared to both Hastings and England's housing mix.
- 5.5.2. In terms of size, West St Leonards has a generally similar size mix to both Hastings and England, notwithstanding the main difference in terms of the number of 1 bed homes, where there are fewer in the NA compared to both the local authority and country. In addition, both West St Leonards and Hastings have fewer 4+ bed homes than when compared to England, which likely reflects the more urbanised nature of the two areas, as opposed to other parts of England, which may include larger country homes in comparison to the denser settlement pattern observed in these urban areas.
- 5.5.3. Census data is fairly unreliable when it comes to revealing changes to West St Leonard's housing mix over the past decade due to changes in how the relevant datasets are recorded. Nonetheless, assessing the data at face value, it suggests that there was a large decrease in 1 bedroom dwellings between 2011-2021, with the only

increases in 3 and 4+ bedroom homes. However, when 2021 levels are compared to the 2021 stock plus recent completions and future commitments as of January 2025, a more robust picture emerges, which suggests that there have and will continue to be moderate increases across the board for 1, 2 and 3 bed homes and larger increases in 4+ bedroom homes as these commitments are fulfilled. Again, if new development continues to prioritise the largest homes without providing a sufficient mix of smaller sized homes, this could present problems for those who are less wealthy or those looking to downsize.

Population characteristics

- 5.5.4. West St Leonard's population is older than both Hastings' and England's, with a higher proportion of the population in all age categories older than and including 45-64, while conversely having a lower proportion than both Hastings and England in all age categories younger than 45-64. As the population continues to evolve to 2039 it is likely that the large 45-64 group in particular will enter the 65-84 cohort, and the 65-84 cohort will enter the 85 and over cohort, both points at which people's housing needs start to change – for example, requiring accessibility adaptations or additional care/support.
- 5.5.5. Since 2011, West St Leonards has seen a clear trend towards an ageing population, with the largest increase (31.3%) in the 65-84 age cohort and decreases in the younger population groups of 15-24 (-23.5%) and 25-44 (-8.9%), suggesting that West St Leonard is struggling to retain or attract younger family households and younger people in general.
- 5.5.6. This evidence would appear to support the potential for any future development to specifically attract and retain these groups if that is the community's wish, alongside an imperative to accommodate the growing population of older people – who may be seeking to downsize or experiencing changing mobility and support needs.
- 5.5.7. The composition of West St Leonard's households (in terms of the number of people, their age, and their relationships to one another) is broadly similar to that of Hastings and England. It is interesting to note that the proportion of households with non-dependent children grew by 10.1% between 2011 and 2021 in the NA, much faster than the national average of just 3.5%, which could indicate the relative unaffordability of entry-level homes in West St Leonards, where young people are financially unable to move out and form their own households.
- 5.5.8. At the time of 2021 Census, just under three quarters of the population have at least one more bedroom than they would be expected to need, and around a third have two more. This is particularly the case for couples aged over 66 and families without children. While not uncommon, this might suggest that the NA's larger housing is not necessarily being occupied by households with the most family members, but by the people with the most wealth or by older people who have not chosen or been able to move to smaller properties. It is also of note that 3.0% of households are over occupied, which unsurprisingly, tends to be made up of family households with children.

Future population and size needs

- 5.5.9. It is possible to estimate the size mix of future homes that might best accommodate demographic trends and address imbalances in the existing housing stock. The result of this process suggests that future housing delivery should focus on smaller homes - 1 and 2 bedroom homes. This could help to achieve two key outcomes: improving affordability, and meeting the needs suggested by demographic trends (notably ageing and counteracting the decline in younger families).
- 5.5.10. However, the absence of 3 and 4+ bedroom homes in the model results means that this recommendation is fairly restrictive and imbalanced. This is partly due to differences in the starting mix of the geographies used for its key data inputs. As such, there is scope to adjust the model results to arrive at a more balanced recommendation that offers wider choice in the market and reflects affordability and other secondary evidence. Taking these various points into account, future development in West St Leonards could seek to deliver the proposed size mix as set out below:
- 65-75% 1 bedroom;
 - 15-25% 2 bedroom;
 - 0-10% 3 bedroom; and
 - 0-10% 4+ bedroom.
- 5.5.11. Some caution should be applied before taking forward such a mix into Neighbourhood Plan policy. West St Leonards plays a role in the wider housing market area and provides complimentary types and sizes of homes to those available in the centre of Hastings and Bexhill. For this reason, whilst the housing stock in the NA may appear unbalanced, and in need of more smaller properties to provide choice locally, it is important to recognise that neighbourhoods with concentrations of larger properties serve an important role in wider market areas.
- 5.5.12. It is also worth noting that the evidence suggests that smaller properties are more likely to be used as second homes/ holiday lets than larger properties in the NA. This is a pattern that AECOM has observed in other coastal areas. As such, increasing the proportion of smaller properties in new development might risk these properties being taken up by second home owners rather than residents. This is discussed further in Section 7.
- 5.5.13. The mix in this section provides a starting point to think about future housing requirements but it is important to remember that other factors should be considered in determining the dwelling mix that is desirable in the NA or on any particular site. These include the specific characteristics of the nearby stock of housing (such as its condition and design), the role of the NA or site within the wider housing market area (linked to any Local Authority strategies or plans) and site-specific factors. In addition, to avoid being too prescriptive, one potential approach would be to combine the size categories and allow for greater flexibility between them, for example by requiring the largest proportion of new homes to have 1-2 bedrooms rather than specifying percentages for each.

6. Specialist Housing for Older People

6.1. Introduction

6.1.1. It is relatively common for neighbourhood plans in areas with ageing populations to include policies relating to specialist housing for older people. This chapter considers in detail the specialist housing needs of older people in West St Leonards. It focuses on specialist forms of provision but recognises that the majority of older people will live in the mainstream housing stock. The approach is as follows:

- To review the **current provision** of specialist housing in the NA;
- To estimate the **potential demand** for this form of accommodation with reference to the projected growth in the older population and current rates of mobility limitation; and
- To discuss the potential for meeting this need through adaptations to the mainstream stock and other **additional considerations**.

6.1.2. Because of the wide variation in the level of support needed, as well as the financial capabilities of those affected, the estimates of need presented here should be viewed with caution – as an idea of the broad scale of potential need rather than an obligatory target that must be met.

6.1.3. It is important to note that the need for housing for particular groups of people may well exceed, or be proportionally high in relation to, the total housing need or requirement. This is because the needs of particular groups will often be calculated having consideration to the whole population of an area as opposed to the projected new households which form the baseline for estimating housing need overall.¹⁴

6.1.4. This study covers the need for housing, i.e. buildings that the planning system classifies as Use Class C3 (private dwellings).¹⁵ Residences that fall into Use Class C2 (institutions including prisons, boarding schools and some care homes for older people) are largely beyond the scope of this research. However, it is possible to estimate the likely need for residential and nursing care over the Neighbourhood Plan period.

6.1.5. The distinction between care homes for older people that fall into use class C2 and those where accommodation is counted as C3 is blurred. As such, the findings of this chapter may justify the provision of extra-care C3 housing and/or C2 care home units, but it is not possible to state definitively how much of each would be required. C3 specialist accommodation is typically self-contained with its own front door, made available on an individual basis with support provided in the home or not at all if the resident does not require it, and offered for sale or rent on the open market.

¹⁴ See Paragraph: 017 Reference ID: 2a-017-20190220, at <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>)

¹⁵ For a full description of Planning Use Classes, please refer to https://www.planningportal.co.uk/info/200130/common_projects/9/change_of_use

Definitions

- **Older people:** people over retirement age, ranging from the active newly retired to the very frail elderly. Their housing needs tend to encompass accessible and adaptable general needs housing as well as the full spectrum of retirement and specialised housing offering additional care.
- **Specialist housing for older people:** a wide range of housing types specifically aimed at older people, which may often be restricted to those in certain older age groups. This could include residential institutions, sheltered housing, extra care housing, retirement housing and a range of other potential types of housing which has been designed and built to serve the needs of older people, including often providing care or other additional services.
- **Sheltered Housing¹⁶:** self-contained flats or bungalows where all the residents are older people. Schemes on the whole provide independent, self-contained homes, either to rent or buy. Properties in most schemes have features like raised electric sockets, lowered worktops, walk-in showers, and so on, as well as being linked to an emergency alarm service. Some will be designed to accommodate wheelchair users. Managed schemes will also usually have some shared or communal facilities such as a lounge for residents to meet, a laundry, guest flats and gardens.
- **Extra Care Housing:** housing which usually consists of purpose-built or adapted flats or bungalows with a medium to high level of care available if required. Residents are able to live independently with 24-hour access to support services and staff, and meals are often also available. In some cases, these developments are included in retirement communities or villages - the intention is for residents to benefit from varying levels of care as time progresses.
- **Category M4(2):** accessible and adaptable dwellings. These standards can be applied to mainstream housing as well as in specialist accommodation such as sheltered housing and extra care.
- **Category M4(3):** dwellings which are capable of adaptation for wheelchair users, or are already built for use of wheelchair throughout. These standards can be applied to mainstream housing as well as in specialist accommodation such as sheltered housing and extra care.

6.2. Specialist housing for older people

- 6.2.1. According to the search function on the Elderly Accommodation Counsel website, there are zero units of specialist accommodation in the NA at present (where specialist accommodation refers to adaptations, sheltered, or retirement living housing). There are, however, two existing care home facilities which supply a total of 87 spaces in care homes.

¹⁶ See <http://www.housingcare.org/jargon-sheltered-housing.aspx>

- 6.2.2. However, due to the nature of the NA, which forms part of a wider urban area, it may be useful to assess the specialist housing supply in the wider area of Hastings, given the NA is functionally connected and related to the rest of the local authority. This wider area includes 23 specialist housing facilities and 29 care home facilities, for a total of 52 facilities in Hastings. In total, these facilities supply 2,336 dwellings across the borough. Though outside of the borough of Hastings, there are also a further 65 facilities (36 specialist housing facilities and 30 care home facilities) located in the adjacent town of Bexhill-on-Sea to the west of the NA, which may also be useful to consider. In total, these facilities supply 2,250 dwellings across the town of Bexhill-on-Sea. There are therefore a good number of specialist housing and care home facilities within the wider area, however the NA in particular represents a relative gap in provision within an otherwise well-served area.
- 6.2.3. The 2021 Census indicates that at this time there were 659 individuals aged 75 or over in West St Leonards. There is no current specialist housing provision within West St Leonards, however within Hastings more widely, which the NA is well connected to, the current provision is in the region of 144 units per 1,000 of the 75+ population (a common measure of specialist housing supply). It is relevant to note that the national average for England is 136 units per 1,000 of the 75+ population¹⁷, so though provision in the NA itself is poor, in the context of the surrounding area, it is relatively well served.

Demographic characteristics

- 6.2.4. The starting point for estimating the need for specialist housing for older people is to project how the overall number of older people in West St Leonards is likely to change in future. This is calculated by extrapolating population projections from the ONS Sub-National Population Projections for Hastings. The results are set out in Table 6-1.
- 6.2.5. The results suggest that the number of older people in the NA and in Hastings more widely are likely to increase. It is interesting to note that there is currently (and is expected to continue to be) a slightly larger proportion of older people in West St Leonards than Hastings more widely, suggesting that the NA may be a good location for any future provision of specialist housing or care facilities in the local authority on these grounds. Future locations are, of course, subject to a number of other constraints or opportunities that may determine the suitability of a facility; specialist housing for older people should only be provided in sustainable, accessible locations that offer services and facilities, public transport options, and the necessary workforce of carers and others.
- 6.2.6. A key assumption for the estimate given at the end of this section is that the older people living in the NA currently are already suitably accommodated, either because they occupy the existing stock of specialist accommodation, have made appropriate adaptations to their own homes or do not require support or adaptations. This is unlikely to be completely true, but it is not possible to determine how many such individuals are inadequately housed without evidence from a household survey (which

¹⁷ Table 22, 'More Choice Greater Voice' (2008), published by Housing LIN for CLG (now MHCLG) and the Care Services Improvement Partnership

itself may not give a complete picture). As such, the growth in the older population rather than the total at the end of the Neighbourhood Plan period is the key output of this calculation.

Table 6-1: Modelled projection of older population in West St Leonards by end of Plan period

Age group	2021		2039	
	West St Leonards	Hastings	West St Leonards	Hastings
All ages	6,815	90,996	7,141	95,348
75+	659	8,085	1,101	13,504
%	9.7%	8.9%	15.4%	14.2%

Source: ONS SNPP 2020, AECOM Calculations

6.2.7. The next step is to consider the need for different tenures of dwelling for older people. It is assumed that those currently occupying their own home will wish to do so for as long as practicably possible in future, even where downsizing or moving into specialist accommodation. Equally, those who currently rent, either in the private or social sectors, are projected to need Affordable Rented specialist accommodation.

6.2.8. The 2011 55-75 age bracket is considered the best proxy for the group likely to fall into need for specialist accommodation during the Neighbourhood Plan period to 2039. The top row in Table 6-2 outlines the tenure mix among households aged 55-75 at Local Authority level, which indicates that the vast majority of older households are home owners and that, of the remainder, around two thirds are in social rather than private rented accommodation.

6.2.9. The expected growth in the 75+ population in the NA is 442 additional individuals by the end of the plan period. This can be converted into 281 households based on the average number of people per household aged 75+ at Local Authority scale. Multiplying this figure by the percentages of 55-75 year olds occupying each tenure gives a breakdown of which tenures West St Leonards households are likely to need in 2039, and is shown in the bottom row of Table 6-2.

Table 6-2: Tenure of households aged 55-75 in Hastings (2011) and projected aged 75+ in West St Leonards (2039)

	All owned	Owned outright	Owned (mortgage) or Shared Ownership	All Rented	Social rented	Private rented	Living rent free
Hastings (2011 mix)	75.7%	51.3%	24.4%	24.3%	15.8%	8.4%	0.2%
West St Leonards (2039)	213	144	69	68	44	24	0

Source: Census 2011

6.2.10. It is also important to consider rates of disability by tenure. The tendency for people in rented housing to have higher disability levels is well established. It arises partly

because people with more limiting disabilities tend to have lower incomes. It also reflects the fact that as people develop support and care needs they may find that the only suitable and affordable option to them is available in the social rented sector. Table E-2 in Appendix E presents this data for West St Leonards from the 2011 Census.

Future needs for specialist accommodation and adaptations

- 6.2.11. Based on the evidence outlined above, the number of households falling into potential need for specialist accommodation over the Neighbourhood Plan period is calculated to be 146.
- 6.2.12. AECOM's modelling, summarised in Table 6-3, is based on the assumption that those whose day-to-day activities are limited a lot may need housing with care (e.g. extra care housing, with significant on-site services, including potentially medical services), while those with their day to day activities limited only a little may simply need adaptations to their existing homes, or alternatively sheltered or retirement living that can provide some degree of oversight or additional services. However, it is important to note that, even those people who have high support or care needs can often be supported to live in their own homes. This is often reflected in policy of local authorities, with explicit aim to reduce the need to commission increasing numbers of care home beds.
- 6.2.13. These estimations suggest that the greatest need is for market (as opposed to subsidised) specialist housing, which is unsurprising given that most older households are already homeowners and would not qualify for subsidised housing. The need is relatively balanced between options with additional care and less specialised options – for which adaptations to market housing represent a viable alternative.

Table 6-3: AECOM estimate of specialist housing for older people need in West St Leonards by the end of the Neighbourhood Plan period.

Type	Affordable	Market	Total (rounded)
Housing with care	22	53	75
Adaptations, sheltered, or retirement living	16	56	71
Total	38	109	146

Source: Census 2011, AECOM Calculations. Figures may not sum due to rounding.

- 6.2.14. It is worth comparing these findings with the recommendations of the Housing Learning and Improvement Network (HLIN), one of the simplest and widely used models estimating for the housing needs of older people.

HLIN calculations

- 6.2.15. Table E-3 in Appendix E reproduces the key assumptions of HLIN's Strategic Housing for Older People (SHOP) toolkit. Applying those assumptions to the growth in the older population of West St Leonards results in a total of 111 specialist dwellings that might

be required to the end of the Neighbourhood Plan period. This is set out in Table 6-4. Again, the majority of need is for market options, but the HLIN estimates suggest there is less of a need for extra care accommodation compared to adaptations, sheltered, or retirement living homes.

Table 6-4: HLIN estimate of specialist housing for older people need in West St Leonards by the end of the Neighbourhood Plan period

Type	Affordable	Market	Total (rounded)
Housing with care	14	18	31
Adaptations, sheltered, or retirement living	27	53	80
Total	40	71	111

Source: Housing LIN, AECOM calculations. Figures may not sum due to rounding.

Further considerations

- 6.2.16. The above estimates suggest that potential need for specialist accommodation could be in the range of 111-146 units over the Neighbourhood Plan period. However, it may not be possible or appropriate to deliver this scale of new accommodation. It is proportionally high in relation to the overall housing delivery expectation in the NA, and therefore should not necessarily be prioritised to the exclusion of other groups, such as those in need of Affordable Housing.
- 6.2.17. As noted, specialist housing for older people should only be provided in sustainable, accessible locations that offer services and facilities, public transport options, and the necessary workforce of carers and others, taking particular note of the topography of St Leonards, with a narrow coastal plain then steep hills and valleys going inland.
- 6.2.18. Alongside the need for specialist housing to be provided in accessible locations, another important requirement is for cost effectiveness and economies of scale. This can be achieved by serving the specialist older persons housing needs arising from a number of different locations and/or Neighbourhood Areas from a single, centralised point (i.e. what is sometimes referred to as a ‘hub-and-spoke’ model).
- 6.2.19. It is considered that West St Leonards is, in broad terms, a suitable location for specialist accommodation on the basis of the accessibility criteria and the considerations of cost-effectiveness above, especially given the current lack of provision in the NA, an anomaly in an otherwise well-served area. As such, there is potential for such accommodation to be provided within the Neighbourhood Area (while noting there is no specific requirement or obligation to do so if there is potential to meet need arising from West St Leonards in other suitable locations near to but outside the Plan area boundaries).

- 6.2.20. It is also important to emphasise that the potential need for specialist housing for older people overlaps with the need for care home bedspaces and the need for adaptations to mainstream housing. These topics are considered in the sections below.

6.3. Care homes

- 6.3.1. Residential and nursing care homes are not defined as housing because they do not provide self-contained accommodation where an older person can live independently. Care home accommodation is defined as institutional accommodation rather than housing.
- 6.3.2. However, residents of care homes may be similar in terms of their care and support needs as those living in specialist housing, or even mainstream housing with appropriate care and support delivered in their homes. There may be some scope for older people who would otherwise have been accommodated in care homes to meet their needs within specialist or mainstream housing if sufficient appropriate accommodation can be provided. Nevertheless, there is likely to be continued need for care home accommodation to meet more acute and severe needs, and to offer choice to some older people and their families about how they are cared for and supported.
- 6.3.3. Given the overlap between people who might enter care home accommodation and those who might take up specialist housing or care and support in their own home if available, estimates of the future need for care home accommodation, as with estimates of the need for specialist housing above, are uncertain and depend on both local and national policies, delivery, and the appetite of private developers.
- 6.3.4. AECOM has estimated the likely need for care home accommodation over the plan period, based on the HLIN SHOP toolkit prevalence rates for residential and nursing care homes for older people (aged 75+). This estimate applied the prevalence rates in the 'More Choice, Greater Voice' 2008 report which informed the development of the HLIN toolkit. This report suggested that 65 residential care beds per 1,000 people aged 75+ was an appropriate rate. For nursing care beds this is an extra 45 care beds per 1,000 people aged 75+. Based on these rates, applied to the growth in the older population for consistency with the calculations above, it is estimated that in 2039 there would be a need for 29 residential care beds and 20 nursing care beds in the NA, a total increase of 49 from present levels.
- 6.3.5. It is important to note that as these estimates relate to care homes (or the population in institutions) rather than independent housing, these figures are in addition to the overall need for housing in the NA. However, as discussed in this section, some of the need for care home beds might be met by independent housing accommodation and vice versa.

6.4. The Role of Mainstream Housing

- 6.4.1. The majority of older people live in mainstream housing and will continue to do so all of their lives. Based on the estimated number of older people and the tally of the

existing stock in Appendix E, around 81% of the West St Leonards population aged 75 and over is likely to live in the mainstream housing stock¹⁸.

- 6.4.2. It is not possible to be precise about how well older people are accommodated within mainstream housing, in terms of whether their accommodation is suitable to their needs and whether adequate care or support is provided within the home when they need.
- 6.4.3. However, if it becomes clear that it is unlikely that a large volume of additional specialist supply will become available during the Neighbourhood Plan period, another key avenue to addressing those with relevant needs is to discuss the standards of accessibility and adaptability in new development to be met in the Local Plan with HBC.
- 6.4.4. It is relatively common for Local Plans to require that all or a majority of new housing meets Category M4(2) standards in response to the demographic shifts being observed nationwide. Government is considering mandating M4(2) on newly erected dwellings¹⁹, although changes to Building Regulations have not yet been made.
- 6.4.5. The current emerging Local Plan policy DP2 does mandate this, requiring all new homes to meet M4(2) Accessible and Adaptable standards, in doing so providing explicit encouragement for development to accommodate specific groups such as older people.
- 6.4.6. The proportion of new housing that might accommodate those using wheelchairs is harder to define at small scales. Typically, at Local Authority scale, this might be set with reference to the proportion of Affordable Housing applicants in the Local Authority area falling into this category or to wider data from surveys and other sources where available. The emerging Local Plan states that sites that provide Affordable Housing in line with Strategic Policy SP2 will, as part of the Affordable Housing requirement, need to provide 5% of the total housing requirement to meet M4(3): Category 3 - Wheelchair Accessible Dwellings.
- 6.4.7. Table 6-5 sets out the proportion of wheelchair users in England as a whole, either using a wheelchair all of the time (0.6% of the population) or part of the time (3% of the population). As a crude estimate, these percentages are applied to the expected level of housing delivery for West St Leonards to suggest the number that might be encouraged to be wheelchair friendly or adaptable; though as noted earlier in this report the 'expected delivery' figure is based off the sum of all allocations in the emerging Local Plan that are within the NA (406 dwellings), however the actual number of homes delivered is likely to be much higher than this. Nonetheless, this figure would imply a potential need for 3-13 wheelchair accessible dwellings over the Neighbourhood Plan period. It is worth noting that these national figures are for all

¹⁸ 659 over 75s in 2021, of which none are accommodated in specialist housing, though 97 are in care homes, leaving 562 people living in mainstream housing. This is approximate since some people in specialist housing and care homes will be under the age of 75.

¹⁹ See [Raising accessibility standards for new homes: summary of consultation responses and government response - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/raising-accessibility-standards-for-new-homes)

age categories, not just older persons, although it is likely that a significant proportion of households using a wheelchair will be older persons.

Table 6-5: Wheelchair use Nationally Applied to West St Leonards

	Percentage in England	% applied to NA housing requirement figure (2039 to end of plan period)
Households using wheelchair all the time	0.6%	3
Households using wheelchair either indoors or outdoors	3.0%	13

Source: Survey of English Housing 2018/19

6.5. Conclusions- Specialist Housing for Older People

Characteristics of the current older population

- 6.5.1. As of the 2021 Census, there were 659 individuals aged 75 or over in West St Leonards, representing 9.7% of the population. There are currently no specialist housing schemes in the NA, however there are a higher than average number of specialist housing facilities within the wider area, but the NA just represents a relative gap in provision within an otherwise well-served area. There are 2 care home facilities within the NA, which together supply a total of 87 spaces for older people who require care. Again, there are additional care home facilities within the wider area of Hastings, as well as in the nearby town of Bexhill-on-Sea to the west of West St Leonards.
- 6.5.2. Three-quarters (75.7%) of Hastings' households aged 55-75 in 2011 (and therefore likely to reach the 75+ bracket by 2039) are owner occupiers, and the remainder predominantly rent from a social landlord. This is important because those currently owning will require specialist accommodation for market purchase, being largely ineligible for subsidised housing, while those in private or social rent will need to rely on subsidised rented housing because they are unlikely to have the funds to buy.

Projected demographic change and need for specialist housing

- 6.5.3. The 75+ population of the NA is projected to increase to 1,101 by the end of the plan period, increasing from 9.7% to 15.4% of the overall population in 2039. As established in the previous chapter, West St Leonards has a slightly older population than the wider borough and population growth can be expected to be driven to some extent by older households. West St Leonards is likely to age faster in the coming years unless new development continues to attract a replacement population of younger families.
- 6.5.4. The potential need for specialist housing with some form of additional care for older people can be estimated by bringing together data on population projections, rates of disability, and what tenure of housing the current 55-75 cohort occupy in the NA. This can be sense-checked using a toolkit based on national research and assumptions.
- 6.5.5. These two methods of estimating the future need in West St Leonards produce a range of 111 to 146 specialist accommodation units that might be required during the Neighbourhood Plan period. These estimates are based on the projected growth of

the older population, thereby assuming that today's older households are already well accommodated. If this is found not to be the case, it would justify aspiring to exceed the range identified here.

- 6.5.6. These estimates are also broken down by tenure and level of support required. Broadly, 64-75% of the need is for accommodation offered for market purchase. This chimes with the higher propensity of older households to be homeowners. Especially given that there are more specialist housing units available for Social Rent as part of the current stock, future supply of specialist housing may look to focus on housing for purchase on the open market. It should be noted that Neighbourhood Plans cannot set the proportion of specialist homes to be affordable, as this generally has to be in line with Local Plan policy for all housing. Between 49-72% of the need is found to be for sheltered housing with limited support rather than additional care arrangements.
- 6.5.7. The potential additional need for care and nursing home beds in West St Leonards to 2039 can be roughly estimated at 29 residential care beds and 20 nursing care beds. The current provision of 145 care home units is likely to be sufficient to continue to satisfy future need for more intensive care arrangements, although the care homes are likely to be servicing the needs of a wider area than West St Leonards alone. Though, in a similar vein, given the relative quantity of specialist housing facilities in the surrounding areas, these other locations may be able to assist those currently residing in the NA who require this type of housing.
- 6.5.8. These estimates, for specialist housing and care/nursing homes, are fairly large relative to the scale of recent and expected future development. It should therefore be emphasised that it may not be considered prudent to prioritise the potential demand from older people to the exclusion of other groups, such as those in need of Affordable Housing, young families, and others important to maintaining a balanced and vibrant community.
- 6.5.9. The HNA evidence can be used to support specialist housing development but does not make that obligatory. How far to promote this is a choice for the West St Leonards Neighbourhood Forum and the wider community.

Accessibility and Adaptability

- 6.5.10. Depending on whether there is likely to be a large volume of additional specialist supply during the Plan period, an alternative or additional avenue to the provision of additional specialist homes is to discuss the standards of accessibility and adaptability required of new development with HBC. There is a particularly high degree of overlap between the groups served by sheltered specialist housing and adapted mainstream housing, so the unmet need for such homes identified here can be reduced through this avenue.
- 6.5.11. Policy DP2 already sets standards for specific targets for new homes to meet Category M4(2) accessibility standards or M4(3) wheelchair user standards. It is unclear whether Neighbourhood Plans can set their own requirements to meet specific localised needs that differ to the LA, so discussions with HBC are advised if action on this point is a key priority. If this were done, it would demand a high standard of evidence to depart from the Local Plan.

7. Second Homes

7.1. Introduction

- 7.1.1. Neighbourhood Plan policies controlling second home ownership are typically evidenced by demonstrating a high or rapidly increasing rate of second home ownership within a context of acute affordability challenges and/or serious constraints in the availability of overall housing.
- 7.1.2. The existence of second or holiday homes is not necessarily a problem in and of itself. It becomes a problem when it creates intense competition for local home buyers (or renters), inflates prices, or reduces the resident population to the extent that local services, employment, and community vitality are impacted.
- 7.1.3. West St Leonards clearly exhibits these wider challenges, with fairly extreme affordability issues, as demonstrated in Chapter 4.
- 7.1.4. This section of the HNA gathers the limited available data on the rate of second home ownership in West St Leonards that may be used to support policy decisions in this area. The approach is as follows:
- To estimate the **current level** of second home ownership (including commercial holiday lets);
 - To estimate the **financial incentive** for home owners to use their properties for commercial holiday lets as opposed to long term private rentals; and
 - To discuss the potential **policy options** relating to second homes in the NA.

7.2. National Data

- 7.2.1. Before looking at second home ownership levels in the NA, it is important to understand the levels of second home ownership, and specifically holiday lets, across the country. According to the English Housing Survey 2018-2019, 2.4 million households in England reported having at least 1 additional residence, with 772,000 of these second homes (including homes primarily used as holiday homes, holiday lets, or working away from home). It was also noted that 57% of second homes were in the UK. Therefore, it could be estimated in 2018/19 that there were at least 440,040 second homes in the UK from households in England, assuming each of 772,000 households above had just 1 additional home.
- 7.2.2. The impact of this nationally is more simply understood as a percentage of all dwellings. There were an estimated 28.9 million dwellings in the UK in 2019²⁰, meaning that second homes (of which the households that owned them lived in England) in the UK accounted for around 1.5% of total dwellings. The UK second home ownership levels would of course be higher than this when also taking into

²⁰ Collated dwelling stock data from GOV.UK, GOV.WALES, National Records of Scotland, and Northern Ireland Department of Finance.

account second homes owned by households in Wales, Scotland, and Northern Ireland.

7.2.3. According to 2021 Census, 3,026,678 people in England had a second address (somewhere they stay for more than 30 days a year). 76.4% (2,311,039) of these people had a second address within the UK.

7.2.4. 14.2% (429,134) of the total second addresses were categorised as holiday homes. It should be noted that this data will not capture holiday homes that are stayed in for less than 30 days a year, it includes people with holiday homes outside the UK, and as it is counted as people with a second address and not households, it may involve some double counting of holiday homes.

7.3. Second Homes and Holiday Lets in West St Leonards

7.3.1. Turning to the NA specifically, 140 out of 3,152 homes in West St Leonards had no usual resident at the time of the 2011 Census, equating to 4.4% of homes.

7.3.2. In 2021 the NA contained 2,901 households and 3,230 dwellings, implying 329 dwellings (or 'household spaces') with no usual resident, accounting for 10.2% of all housing. This represents a significant increase in vacant or second homes over the course of this decade, a trend that may have continued to develop since the 2021 Census.

7.3.3. For comparison, the proportion of dwellings that had no usual residents across Hastings as a whole in 2021 was 8.5%, which though slightly smaller, is relatively similar to the level observed in West St Leonards. This is unsurprising given that the NA is well connected and related to the rest of local authority of Hastings and a drastically different occupancy rate would not be expected.

7.3.4. For England, the rate was 6.0%. It is worth noting that across the country (or even the local authority area), dwellings will be empty for different reasons (including being uninhabitable), not just second home ownership. Due to the seaside location and nature of the NA it is assumed that the majority of dwellings without usual residents are second homes, either personal or for holiday let.

7.3.5. Another way of gauging the number of holiday homes is to look at the number of properties paying business rates (instead of council tax) in that category. This data is correct to the time of writing but has a number of limitations:

- Most importantly, it only gives an indication of the number of commercially rented holiday homes. A holiday let needs to be available for rent 140 days of the year to reach the threshold for business rates. So only the third subcategory of second/holiday homes below would be captured:
 - Second homes that are never rented and only used by the owner;
 - Holiday homes used by the owner primarily, but also available to rent for part of the year (under 140 days) or rented out informally; and
 - Holiday homes with a stronger commercial purpose, available to rent more than 140 days per year.

- In January 2022 the Government tightened the rules on second homes and business rates. This means that as well as being available for rent for at least 140 days a year, from April 2023, second homeowners will have to prove that holiday lets are being rented out for a minimum of 70 days a year to access small business rates relief.²¹
- It is likely that the holiday homes counted in the business rates data would also be captured as dwellings with no usual residents in the Census, since owners of second homes, including those rented out for holiday lets, are obliged to fill in a Census return. This indicator is therefore only useful for context and to show the potential size of the tourist sector as opposed to personal-use second homes.

7.3.6. Research was undertaken on the number of properties in the NA registered for business rates, specifically self-catering holiday units. As of February 2025, this gave a figure of 20 self-catering holiday units. It is also of note that there were 325 beach huts and premises also available for hire, and though these are mainly intended for day hire, many allow visitors to sleep in them overnight, which is in line with the regulations of their license; though crucially using a beach hut as a permanent residence is not allowed nor viable and thus they are not categorised as properties or second homes. In addition, it is also of note that the NA includes the large 'Combe Haven Holiday Park' (with space for 497 privately owned caravan pitches and 283 caravans for let), however as their use is solely for commercial holiday purposes, and never used for long-term residential properties, they are not classified as second homes or holiday lets either.

7.3.7. It is likely that the higher levels of second home ownership in the NA, and the demand for second homes, has had some adverse effect on affordability for local people. It is worth assessing the difference in potential income between private landlords and holiday lets in West St Leonards. In order to undertake this comparison, the number of whole property holiday lets available for a week rental in peak holiday season (July and August) 2025 was established from holiday rental site Airbnb²². Please note the area used for this search excluded the Combe Haven Holiday Park as these caravans represent a separate market to standard private rented dwellings. The average letting price was determined, which could then be compared to the average rental price of private rented properties in West St Leonards. This process is outlined below:

- Average nightly cost of West St Leonards holiday let from Airbnb properties = £159
- Average weekly cost of above = $£159 * 7 = £1,113$
- Average monthly cost of above = $£1,113 * 4 = £4,452$
- Average monthly cost of private rented dwelling in the NA = £1,179

7.3.8. These calculations show that if a holiday let was rented back-to-back, as it is assumed it would be in the summer months, the income (exclusive of any related costs)

²¹ Available here: <https://www.gov.uk/government/news/gove-closes-tax-loophole-on-second-homes>

²² Search of properties as of 12/02/2025

associated with the holiday let would be 3.78 times greater than associated with longer term private rental. This may go some way to explain the existence of holiday lets in the NA. The impact on the private rented sector in West St Leonards can also be seen to an extent, with the proportion of households living in the private rental sector in the NA decreasing by 5.9% between 2011 and 2021, compared to decreases of 3.7% across Hastings and increases of 13.2% nationally. These figures may demonstrate that the increase in holiday rentals are reducing the provision of private rented housing in the NA, as well as across Hastings, while increases in private rented housing is the general trend across the country. This in turn would have a detrimental impact on affordability as demand may outweigh the available supply.

- 7.3.9. Although the potential income difference is clear to see above, there are other factors to be taken into consideration. These include the fact that holiday lets may not be occupied for the whole year, as well as running and maintenance costs (which would be associated with both holiday lets and private rentals), and the greater amount of work potentially required with holiday lets in terms of weekly cleaning and booking administration.
- 7.3.10. In the Spring 2024 budget it was announced that in April 2025 the Furnished Holiday Lettings (FHL) tax scheme will be abolished, removing the tax advantage for holiday lets over long-term residential lets. Although the impacts of this are currently unknown, it may lead to landlords converting furnished holiday lets into longer term residential lets or selling properties.
- 7.3.11. It is also of note that, as of April 2024, HBC have imposed an empty homes and second homes council tax premium of 100% on homes that have been empty for one year or for any second homes effective immediately – though any charges to second homes will not take effect until the 2025-26 financial year at the earliest.²³

7.4. Policy Considerations

- 7.4.1. It is not only West St Leonards within the area that has housing challenges relating to second home ownership. Though West St Leonards is the first Neighbourhood Plan underway within the Local Authority, there are a number of made Neighbourhood Plans in Rother, the surrounding Local Authority, which have addressed the issue of second homes. Peamarsh NP Policy E4, for example notes that proposals relating to tourism facilities and activities will only be supported where they do not result in a reduction to the parish housing stock. More explicit examples of policy on second homes are included in Southwold's (Suffolk) Neighbourhood Plan, Policy SWD4 which requires all new housing to be restricted in perpetuity to ensure that each new dwelling is occupied only as a Principal Residence (a property which is occupied as the sole or main home of the occupants and where the occupants spend the majority of their

²³ More information on this policy can be found here:
<https://hastings.moderngov.co.uk/documents/s52517/Appendix%20-%20Hastings%20Council%20Tax%20Empty%20Homes%20Second%20Homes%20Premiums%20Policy.pdf>

time when their employment does not required them to be away from home for purposes of their work).

- 7.4.2. The affordability evidence establishes a clear context of poor and worsening affordability in West St Leonards that prevents local people from moving to homes better suited to their needs within the neighbourhood and prevents younger households without significant financial help from accessing suitable housing.
- 7.4.3. It is not possible to establish a precise causal link between second home ownership and declining affordability because rising prices and declining affordability is affected by other factors such as economic growth at the national level. However, given the sharp rise in second home ownership in the NA, AECOM suggest that it is likely that the second homes market is a factor in the rise in house prices and declining affordability in the area. Furthermore, there are substantial financial incentives to let properties to holiday makers rather than long term tenants in the private rented sector. The private rented sector in the NA is decreasing and is likely constrained by the growth of the holiday let and second home market. In the context where new housing development is limited, all other things being equal, the expansion of second homes and holiday lets will reduce the availability of housing for households wishing to live in the area. Reduced availability (or supply) when demand is the same or growing, leads to increased prices and rents.
- 7.4.4. AECOM suggest this may be a reason to consider a Principal Residence Policy or similar in the NA, though it may not be possible to justify as of yet given the actual level of second homes is not excessively high as of present (though a case could potentially be made due to the sharp rise in second homes in recent years). As this policy is developed, if new data becomes available (e.g. additional data sources quantifying levels of second home ownership), the group may wish to refine the policy to adapt to any changes in the scale of the market.

7.5. Conclusions- Second homes

- 7.5.1. Neighbourhood Plan policies controlling second home ownership are typically evidenced by demonstrating a high or rapidly increasing rate of second home ownership within a context of acute affordability challenges and/or serious constraints in the availability of overall housing.
- 7.5.2. The existence of second or holiday homes is not necessarily a problem in and of itself. It becomes a problem when it creates intense competition for local home buyers (or renters), inflates prices, or reduces the resident population to the extent that local services, employment, and community vitality are impacted.
- 7.5.3. West St Leonards clearly exhibits some of these wider challenges, with some affordability issues and a decline in the private rented sector over the last 10 years, with a rapid increase in the proportion of dwellings with no usual resident household between 2011 and 2021, increasing from 4.4% to 10.2% of all dwellings.
- 7.5.4. Although not substantially above the national average of local authority or national average of 8.5% and 6.0% respectively, the rapid increasing rate is what may be of most concern.

- 7.5.5. It is worth noting that across the country (or even the local authority area), dwellings will be empty for different reasons (including being uninhabitable), not just second home ownership. However, due to the location and nature of the NA it is assumed that the majority of dwellings without usual residents are second homes, either personal or for holiday let.
- 7.5.6. Of the 23 whole properties identified for letting on Airbnb between July and August 2025, the average nightly cost was £159, amounting to an income 3.78 times greater per month than that associated with longer term private rental. This may go some way to explain the increased rate of holiday lets in the NA.

8. Next Steps

8.1. Recommendations for next steps

- 8.1.1. This Neighbourhood Plan housing needs assessment aims to provide West St Leonards Neighbourhood Forum with evidence on a range of housing trends and issues from a range of relevant sources. We recommend that the neighbourhood planners should, as a next step, discuss the contents and conclusions with HBC with a view to agreeing and formulating draft housing policies, bearing the following in mind:
- All Neighbourhood Planning Basic Conditions, but in particular Condition E, which is the need for the Neighbourhood Plan to be in general conformity with the strategic policies of the adopted development plan;
 - The views of HBC;
 - The views of local residents;
 - The views of other relevant local stakeholders, including housing developers and estate agents; and
 - The numerous supply-side considerations, including local environmental constraints, the location and characteristics of suitable land, and any capacity work carried out by HBC.
- 8.1.2. This assessment has been provided in good faith by AECOM consultants on the basis of housing data, national guidance and other relevant and available information current at the time of writing.
- 8.1.3. Bearing this in mind, it is recommended that the West St Leonards Neighbourhood Forum should monitor carefully strategies and documents with an impact on housing policy produced by the Government, HBC or any other relevant party and review the Neighbourhood Plan accordingly to ensure that general conformity is maintained.
- 8.1.4. At the same time, monitoring on-going demographic or other trends over the Neighbourhood Plan period will help ensure the continued relevance and credibility of its policies.

Appendix A : Assessment geography

a.1 For Census purposes, the whole of England is divided into statistical units of similar population size called Output Areas (OAs) and their larger equivalents. OAs are the smallest units. They make up Lower Layer Super Output Areas (LSOAs), which in turn make up Middle Layer Super Output Areas (MSOAs).

a.2 It is important to note that it is not possible to exactly represent the NA of West St Leonards through a combination of Census Output Areas (OAs). This assessment has therefore adopted the approach that where more than half of an OA's respective homes lie within the NA boundary, the OA will be included in the analysis, and where more than half of the respective homes lie outside of the NA boundary, the OA will be excluded.

a.3 With this said, the OAs deemed to best represent West St Leonards that were used in this report are set out below. Those in **bold** are the OAs that do not entirely fall within the NA boundary, but are deemed to have more than 50% of the OA's homes within the NA boundary.

- E00106556
- E00106557
- **E00106558**
- E00106624
- E00106631
- **E00106636**
- E00106637
- E00106731
- E00106732
- E00106733
- E00106734
- E00106735
- E00106736
- E00106737
- E00106738
- E00106739
- E00106740
- E00106741
- E00106742
- E00106743
- E00106744
- E00106745

a.4 Many other datasets besides the Census itself make use of OAs, but not necessarily down to the same level of detail. The most relevant combination of LSOAs in this case are listed below. Again, those in **bold** are the LSOAs that do not entirely fall within the NA boundary, but partially overlap.

- **E01020985** (single LSOA highlighted in second image below)
- **E01020997**
- **E01020998**
- E01021016
- E01021017
- **E01021018**

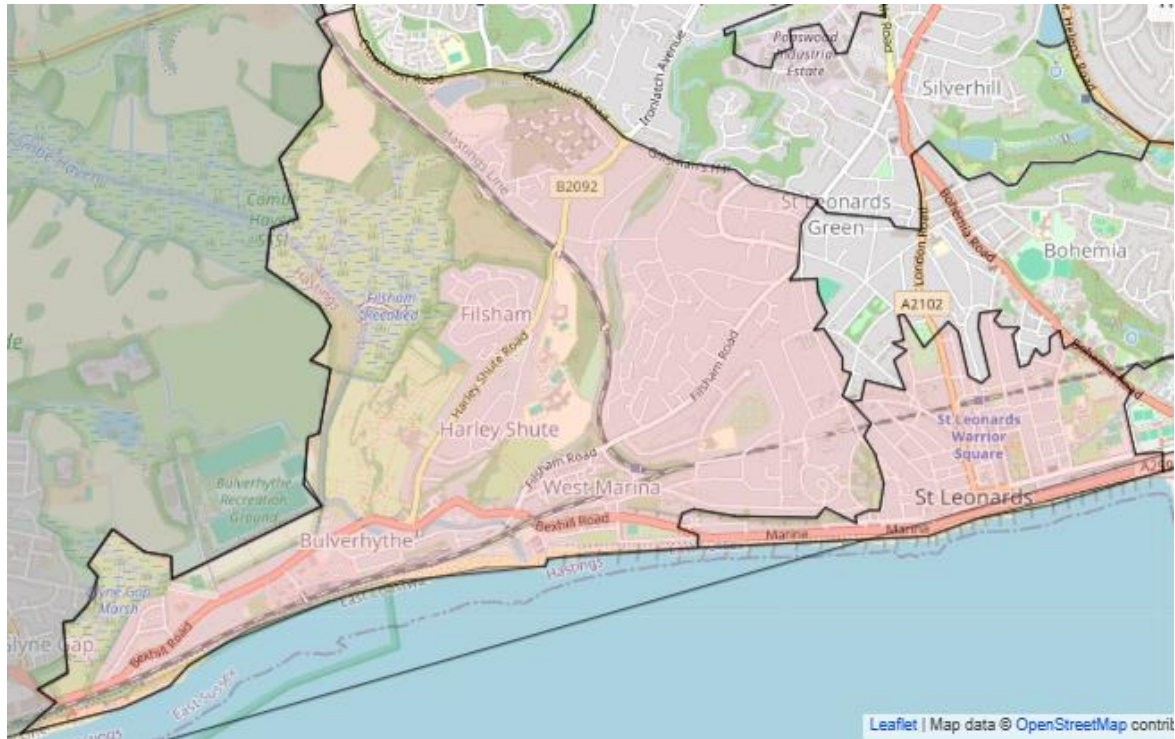
Figure A-1: Map of LSOAs



Source: NOMIS

- a.5 Finally, as noted in the analysis of affordability in the main body of the report, household income data for small areas is only provided down to the scale of MSOAs. The relevant MSOA, in which the NA is located and which will need to serve as a proxy for it, is:
- E02004377 – the large MSOA to the west that covers the majority of the NA, as well as covering a small part of Hastings beyond the NA boundary. This was the MSOA used to gauge income data.
 - E02004378 – covers a small part of the south east section of the NA, with the majority of the MSOA not overlapping with the NA boundary.

Figure A-2: Map of MSOA for Income Data



Source: NOMIS

Appendix B : Local Plan context

Policies in the adopted local plan

b.1 Table B-1 below summarises adopted Local Plan policies that are relevant to housing need and delivery in West St Leonards.

Table B-1: Summary of relevant adopted policies in the adopted Local Plan for Hastings Borough Council

Policy	Provisions
The Hastings Planning Strategy 2011-2028	
Policy DS1: New Housing Development	<p>The target for housing development will be at least 3,400 net new homes for the period 2011 – 2028. Sites will be allocated in the Development Management Plan to meet this target.</p> <p>In order to maintain and make effective use of the existing housing stock, the Council will bring back into residential use empty housing in line with its Empty Homes Strategy.</p> <p>In order to protect the existing stock of family size housing, existing homes should remain as dwellings unless they are unsuitable for residential uses, or would be replaced with new residential development.</p>
Policy FA1: Strategic Policy for Western Area	<p>Sets out that 630 – 700 dwellings will be developed in the Filsham Valley and Bulverhythe Planning Focus Area over the course of the plan period, which lies within the NA.</p>
Policy FA2: Strategic Policy for Central Area	<p>Sets out that 220 – 280 dwellings will be developed in the Maze Hill and Burtons St Leonards Planning Focus Area over the course of the plan period, part of which lies within the NA (a small section to the southeast of the NA).</p>
Policy H1: Housing Density	<p>Residential developments should make full and effective use of land by achieving the following densities:</p> <ul style="list-style-type: none"> a) at least 40 dwellings per hectare in sustainable locations close to a good range of existing or potential services and facilities and where there is, or there is potential for good public transport. This includes Hastings and St Leonards town centres, and the district centres of Silverhill and Ore b) at least 30 dwellings per hectare in all other locations unless there are special local circumstances that require a different treatment. <p>Different densities may be justified where there are particular site circumstances which require consideration. Further individual site assessment work to be carried out through the Development</p>

Policy

Provisions

Management Plan, will explore in more detail where it will be appropriate to vary minimum density requirements.

Policy H2:
Housing Mix

Planning permission will be granted for residential development that delivers a balanced mix of housing both within each site, and across Hastings as a whole. The Council will seek to ensure a genuine mix of housing types within existing and future communities by encouraging proposals for housing development in terms of the extent to which they:

- a) contribute to a well integrated mix of housing types and tenures to support a range of household sizes, ages and incomes to meet both current and projected housing needs
- b) address local tenure mix and whether there is a concentration of a particular tenure of housing that would benefit from diversification or greater choice
- c) take account of existing local household characteristics and whether there is a bias towards younger or older households, families or sharers and how the new development will fit into this context
- d) provide a proportion of homes to Lifetime Homes Standard
- e) in suitable and accessible locations, residential schemes of 50 or more dwellings will need to include at least 2% fully adapted dwellings for wheelchair users

Policy H3:
Provision of
Affordable
Housing

a) Housing developments on Previously Developed Land (Brownfield) will be expected to make the following provision for Affordable Housing:

Site size range (number of net dwellings)	Percentage requirement	On-site provision required? Yes/No	Or, financial contribution in lieu of on-site provision? Yes/No
1-4	10% financial contribution	No	Yes
5-14	20%	Yes	Yes
15+ or 0.5 ha or more in size (irrespective of the number of dwellings)	25%	Yes	No

b) Housing developments on Greenfield land will be expected to make the following provision for Affordable Housing:

Site size range (number of net dwellings)	Percentage requirement	On-site provision required? Yes/No	Or, financial contribution in lieu of on-site provision? Yes/No
1-4	20% financial contribution	No	Yes
5-9	20%	Yes	Yes
10-14	40%	Yes	Yes
15+	40%	Yes	No

Policy	Provisions
Policy H4: Houses in Multiple Occupation	<p>In order to support mixed and balanced communities and maintain an appropriate housing mix within the Borough, applications for changes of use from:</p> <ol style="list-style-type: none"> i. a Class C3 (dwelling house) to a Class C4 (House in Multiple Occupation), or; ii. a Class C3 (dwelling house) to a House in Multiple Occupation in a sui generis use (more than six people sharing) will not be permitted where more than 10% of the total numbers of properties within a 100m radius of the application property are already in use as either Class C4, or other types of HMO in a sui generis use. <p>This policy will not apply to social housing, care homes, children's homes, bail hostels and properties occupied by students which are managed by an educational establishment.</p> <p>This policy will not apply to households who have foreign students staying as guests for a set period of time.</p>

Hastings Development Management Plan

FB1 The Grove School	Residential allocation of 240 homes, with Affordable Housing on site at 25% of the overall housing provision; and at least 2% of the total number of new homes as fully adapted dwellings for wheelchair users.
FB2 Former West St Leonards Primary School	Mixed use allocation including 100 homes, with Affordable Housing on site at 25% of the overall housing provision; and at least 2% of the total number of new homes as fully adapted dwellings for wheelchair users.
FB3 Seaside Road, West St Leonards	Mixed use allocation including 120 homes, with Affordable Housing on site at 25% of the overall housing provision; and at least 2% of the total number of new homes as fully adapted dwellings for wheelchair users.
FB5 Former Hastings College, St Saviours Road	Residential allocation of 44 homes, with Affordable Housing on site at 25% of the overall housing provision. This has now been developed.
FB6 Cinque Ports Way (Former Stamco Timber Yard & TA Centre)	Mixed use allocation including 25 homes, with Affordable Housing on site at 25% of the overall housing provision.
FB7 123-125 West Hill Road (Former Malmesbury House)	Residential allocation of 117 homes, with Affordable Housing on site at 25% of the overall housing provision; and at least 2% of the total number of new homes as fully adapted dwellings for wheelchair users.

Policy	Provisions
FB9 190 Bexhill Road	Residential allocation of 32 homes, with Affordable Housing on site at 25% of the overall housing provision.
FB13 Hastings Garden Centre, Bexhill Road	Residential allocation of 12 homes, with Affordable Housing on site at 25% of the overall housing provision.
MBL3 Gambier House, West Hill Road	Residential allocation of 15 homes, with Affordable Housing on site at 25% of the overall housing provision.
MBL4 West Hill Road Reservoir	Residential allocation of 14 homes, with Affordable Housing on site at 20% of the overall housing provision.

Source: *The Hastings Planning Strategy 2011-2028 and Hastings Development Management Plan.*

Policies in the emerging local plan

b.2 Table B-2 below summarises emerging Local Plan policies that are relevant to housing need and delivery in West St Leonards.

Table B-2: Summary of relevant emerging policies in the emerging Local Plan for Hastings Borough Council

Policy	Provisions												
Hastings Local Plan Consultation Draft (Regulation 18), Winter 2020/21													
Strategic Policy 1 (SP1): Directing Growth	Significant development of new homes will be maximised in the ‘Focus Areas’ of Hastings Central, Bohemia, Little Ridge and Ashdown House, and West Marina and West St Leonards. Development in these Focus Areas should optimise densities whilst ensuring high quality design and, wherever feasible, enhancing visibility of and access to natural and historic assets.												
Strategic Policy 2 (SP2): New and Affordable Housing	<p>A minimum of 4,275 new homes will be delivered over the Plan period (213.75 per annum) with additional homes delivered in the Hastings Central Focus Area as part of mixed-use development.</p> <p>The Council will seek Affordable Housing as part of new residential developments as set out below:</p> <table border="1" data-bbox="411 1776 1383 1942"> <thead> <tr> <th>Size of Development</th> <th>Brownfield Sites</th> <th>Greenfield Sites</th> </tr> </thead> <tbody> <tr> <td>0 – 9 units</td> <td>No minimum requirement</td> <td>No minimum requirement</td> </tr> <tr> <td>10 – 19 units</td> <td>No minimum requirement</td> <td>40%</td> </tr> <tr> <td>20 units or more</td> <td>25%</td> <td>40%</td> </tr> </tbody> </table>	Size of Development	Brownfield Sites	Greenfield Sites	0 – 9 units	No minimum requirement	No minimum requirement	10 – 19 units	No minimum requirement	40%	20 units or more	25%	40%
Size of Development	Brownfield Sites	Greenfield Sites											
0 – 9 units	No minimum requirement	No minimum requirement											
10 – 19 units	No minimum requirement	40%											
20 units or more	25%	40%											

Where justified by a viability appraisal, the Council will apply the 25% Affordable Housing target flexibly where development is for sites identified in Appendix 1, with capacity of less than 30 units, where

Policy Provisions

there is a specific requirement for provision of onsite cultural, leisure community facilities or employment generating uses.

Where Affordable Housing is a policy requirement, the Council will expect a tenure mix in line with the requirements set out below:

Affordable Rent/ Social Rent	Minimum 60% of total affordable housing
Affordable Home Ownership	10% of total affordable housing
Remaining 30%	Determined through negotiation between the local authority and developer and comprising Affordable Rent/Social Rent, shared ownership or any other affordable tenure including intermediate and low-cost homes (which could extend to First homes)

The required dwelling mix for rented affordable homes is set out below

1 Bedroom Homes	2 Bedroom Homes	3+ Bedroom Homes
30%	35%	35%

The Council will support the provision of specialist accommodation, including homes with care or support.

Development Policy 2 (DP2): Design - Space and Accessibility Standards	The Council will require all new homes to meet M4(2) Accessible and Adaptable standards. Where there is an identified need on the Council Housing Register, sites that provide Affordable Housing in line with Strategic Policy SP2 will, as part of the Affordable Housing requirement, need to provide 5% of the total housing requirement to meet M4(3): Category 3 - Wheelchair Accessible Dwellings.
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Focus Area Policy 4 (FA4): West Marina and West St Leonards	Multiple sites within the NA are allocated for development: The Seaside Road site (HL9) and adjacent Cinque Ports Way site (HL11) are central to the delivery of aspirations for this Focus Area. A coordinated approach to development of these sites is encouraged. Priority will be given to arts, culture and other year-round visitor attractions and visitor accommodation. Retention or relocation of existing beach huts should be accommodated. Redevelopment of Gambier and West House (HL111), the former Malmesbury House (HL12) and West St Leonards Primary School (HL115) sites for residential development will be supported.
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Within the Seaside Road site (HL9) development ranging from 2-3 storey houses up to 4-5 storey apartment blocks may be appropriate; these should not dominate the site. There is potential for a taller, landmark building to the west of site HL11 at Cinque Ports Way.

Policy

Provisions

Allocations in the NA in the emerging Local Plan:

- HL9 - Seaside Road, West St Leonards for approx. 152 homes;
- HL11 - Cinque Ports Way for approx. 25 homes;
- HL12 - Former Malmesbury House, West Hill Road for approx. 117 homes;
- HL14 - 190 Bexhill Road for approx. 32 homes;
- HL111 - Gambier House, 111 West Hill Road and West House, 115 West Hill Road for approx. 20 homes;
- HL115 - Former West St Leonards Primary School, Bexhill Road for approx. 60 homes.

Source: Hastings Local Plan Consultation Draft (Regulation 18).

Appendix C : Affordability calculations

- c.1 This section outlines how the affordability thresholds discussed in the Affordability and Affordable Housing have been calculated.

Market housing

- c.2 Market housing is not subsidised and tends to be primarily accessible to people on higher incomes.

Market sales

- c.3 The starting point for calculating the affordability of a dwelling for sale from the perspective of a specific household is the loan to income ratio which most mortgage companies are prepared to agree. This ratio is conservatively estimated to be 3.5. In practice this can be highly variable. Multipliers up to 4.5 or even above 5 times income increasingly available, although the actual average in practice tends to be lower, particularly where applicants are dual earning. The Financial Conduct Authority uses 3.5 or more as its standard assumption for single applicants and 2.75 or more for dual applicants.
- c.4 To produce a more accurate assessment of affordability, the savings required for a deposit should be taken into account in addition to the costs of servicing a mortgage. However, unlike for incomes, data is not available for the savings available to households in West St Leonards, and the precise deposit a mortgage provider will require of any buyer will be determined by their individual circumstances and the state of the mortgage market. An assumption is therefore made that a 10% purchase deposit is required and is available to the prospective buyer. In reality it is possible that the cost of the deposit is a greater barrier to home ownership than the mortgage costs.
- c.5 The calculation for the purchase threshold for market housing is as follows:
- Value of a median NA house price (2023) = £300,000
 - Purchase deposit at 10% of value = £30,000
 - Value of dwelling for mortgage purposes = £270,000
 - Divided by loan to income ratio of 3.5 = purchase threshold of £77,143
- c.6 The purchase threshold for an entry-level dwelling is a better representation of affordability to those with lower incomes or savings, such as first-time buyers. To determine this threshold, the same calculation is repeated but with reference to the lower quartile rather than the median house price. The lower quartile average in 2023 was £228,250, and the purchase threshold is therefore £58,693.
- c.7 It is also worth assessing the purchase threshold for new build homes, since this most closely represents the cost of the new housing that will come forward in future. Land Registry records 29 sales of new build properties in the NA in 2023, which is a robust

enough sample to gauge new build housing prices. The average price of new build properties in 2023 were £309,995, with a purchase threshold of £79,713.

- c.8 In order to provide a comparison with the wider local authority area, it is helpful to also look at the cost of new build housing across Hastings in 2023. The median cost of new build dwellings in Hastings was £291,995, with a purchase threshold of £75,084.

Private Rented Sector (PRS)

- c.9 It is assumed here that rented housing is affordable if the annual rent does not exceed 30% of the household's gross annual income. The percentage of income to be spent on rent before the property is considered affordable varies considerably for individuals, and it is increasingly common for households to dedicate a larger proportion of their earnings to rent. When considering affordability, it is considered good practice to be conservative, and the 30% benchmark is used as ONS's current standard assumption.
- c.10 This is an important assumption because it is possible that a household will be able to afford tenures that are deemed not affordable in this report if they are willing or able to dedicate a higher proportion of their income to housing costs. It is becoming increasingly necessary for households to do so. However, for the purpose of planning it is considered more appropriate to use this conservative lower benchmark for affordability on the understanding that additional households may be willing or able to access housing this way than to use a higher benchmark which assumes that all households can afford to do so when their individual circumstances may well prevent it.
- c.11 The property website Home.co.uk shows rental values for property in the Neighbourhood Area. The best available data is derived from properties available for rent within the TN38 postcode area, which covers a larger area than the Plan area itself but can be used as a reasonable proxy for it. Moreover, because it forms a larger geography with a greater number of rental properties offered, the larger sample size is likely to generate more robust findings.
- c.12 According to home.co.uk, there were 27 properties for rent at the time of search in February 2025, with an average monthly rent of £1,179. There were 21 two-bed properties listed, with an average price of £1,135 per calendar month.
- c.13 The calculation for the private rent income threshold for entry-level (2 bedroom) dwellings is as follows:
- Annual rent = £1,135 x 12 = £13,620;
 - Multiplied by 3.33 (so that no more than 30% of income is spent on rent) = income threshold of £45,400.
- c.14 The calculation is repeated for the overall average to give an income threshold of £47,160.

Affordable Housing

- c.15 There are a range of tenures that constitute the definition of Affordable Housing within the NPPF 2024: social rent and affordable rent, discounted market sales housing, and other affordable routes to home ownership. The First Homes product was introduced in 2021 but is not included in the NPPF Annex 2 definitions. Each of the Affordable Housing tenures are considered below.

Social rent

- c.16 Rents in socially rented properties reflect a formula based on property values and average earnings in each area, resulting in substantial discounts to market rents. As such, this tenure is suitable for the needs of those on the lowest incomes and is subject to strict eligibility criteria.
- c.17 To determine social rent levels, 2021 data and statistical return from Homes England is used. This data is only available at Local Authority scale so must act as a proxy for West St Leonards. This data provides information about rents and the size and type of stock owned and managed by private registered providers and local authorities and is presented for Hastings in Table C-1.
- c.18 To determine the income needed, it is assumed that no more than 30% of income should be spent on rent. This is an assumption only for what might generally make housing affordable or unaffordable – it is unrelated to the eligibility criteria of Affordable Housing policy at Local Authority level. The overall average across all property sizes is taken forward as the income threshold for social rent.

Table C-1: Social rent levels (£)

Size	1 bed	2 beds	3 beds	4 beds	All
Average social rent per week	£73.17	£82.16	£98.49	£108.99	£87.50
Annual average	£3,805	£4,272	£5,121	£5,667	£4,550
Income needed	£12,683	£14,241	£17,072	£18,892	£15,167

Source: Homes England, AECOM Calculations

Affordable rent

- c.19 Affordable rent is controlled at no more than 80% of the local market rent. However, registered providers who own and manage Affordable Rented housing may also apply a cap to the rent to ensure that it is affordable to those on housing benefit (where under Universal Credit the total received in all benefits to working age households is capped).
- c.20 Even a 20% discount on the market rent may not be sufficient to ensure that households can afford this tenure, particularly when they are dependent on benefits. Registered Providers in some areas have applied caps to larger properties where the higher rents would make them unaffordable to families under Universal Credit. This may mean that the rents are actually 50-60% of market levels rather than 80%.

- c.21 Data on the most realistic local affordable rent costs is obtained from the same source as social rent levels for Hastings. Again, it is assumed that no more than 30% of income should be spent on rent, and the overall average is taken forward.
- c.22 Comparing this result with the average 2 bedroom annual private rent above indicates that affordable rents in the NA are actually closer to 40% of market rates than the maximum of 80%, a feature that is necessary to make them achievable to those in need.

Table C-2: Affordable rent levels (£)

Size	1 bed	2 beds	3 beds	4 beds	All
Average affordable rent per week	£87.56	£105.64	£133.66	£176.96	£115.03
Annual average	£4,553	£5,493	£6,950	£9,202	£5,982
Income needed	£15,177	£18,311	£23,168	£30,673	£19,939

Source: Homes England, AECOM Calculations

Affordable home ownership

- c.23 Affordable home ownership tenures include products for sale and rent provided at a cost above social rent, but below market levels. The three most widely available are discounted market housing (a subset of which is the First Homes product), shared ownership, and Rent to Buy. These are considered in turn below.

Discounted Market Sale/ First Homes

- c.24 Discounted market sale homes are affordable home ownership products which offer a discount of at least 20% on market values.
- c.25 First Homes should be available to buy with a minimum discount of 30% below their full market value (i.e. the value of an equivalent new home);
- The discount level can be set higher than 30% – at 40% or 50% – where this can be suitably evidenced. The setting and justifying of discount levels can happen at neighbourhood as well as local authority scale;
 - After the discount is applied the initial sale price must not exceed £250,000 (or £420,000 in Greater London), and lower caps can be set locally;
 - Purchasers must be first-time buyers with an income less than £80,000 (or £90,000 in Greater London), and First Homes can be prioritised for local people and/or key workers;
 - They will be subject to legal restrictions ensuring the discount is retained for future occupants, and renting out or sub-letting will not normally be permitted;
 - In addition to setting the discount level, local authorities and neighbourhood planning groups can apply additional criteria, such as a lower income cap, local connection test or prioritisation for key workers through adopted plans, emerging policy or Supplementary Planning Documents.

- c.26 The starting point for considering whether Discounted Market Sale/First Homes are affordable is the cost of new build entry-level housing in the NA noted above of £309,995.
- c.27 For the minimum discount of 30% the purchase threshold can be calculated as follows:
- Value of a new home (NA new build entry-level) = £309,995.
 - Discounted by 30% = £216,997
 - Purchase deposit at 10% of value = £21,700.
 - Value of dwelling for mortgage purposes = £195,297.
 - Divided by loan to income ratio of 3.5 = purchase threshold of £55,799.
- c.28 The income thresholds analysis in the Affordability and Affordable Housing chapter also compares local incomes with the costs of a 20%, 40% and 50% discounted home. This would require an income threshold of £63,770, £47,828 and £39,857 respectively.
- c.29 All of the income thresholds calculated here for First Homes are below the cap of £80,000 above which households are not eligible.
- c.30 Note that discounted market sale homes may be unviable to develop if the discounted price is close to (or below) build costs. Build costs vary across the country but as an illustration, the build cost for a 2 bedroom home (assuming 70 sq. m and a build cost of £1,750 per sq. m²⁴) would be around £122,500. This cost excludes any land value or developer profit. This would not appear to be an issue in West St Leonards.
- c.31 Table C-3 shows the discount required for market homes to be affordable to the three income groups. The cost of a typical discounted market sale property/First Home is calculated using the price of new build entry-level housing in the NA. However, it is worth thinking about these properties in relation to the cost of new build prices in the wider area, as well as median and entry-level existing prices locally to get a more complete picture. The discount levels required for these alternative benchmarks are given below.

Table C-3: Discount on sale price required for households to afford

House price benchmark	Mean household income	Single LQ earner	Dual LQ earning household
NA median house price	45%	78%	56%
NA new build entry-level house price	47%	79%	58%
NA entry-level house price	28%	71%	42%
LA median new build house price	43%	78%	55%

Source: Land Registry PPD; ONS MSOA total household income

²⁴ It is estimated that in 2022, build costs for a house are between £1,750 and £3,000 per square metre - <https://urbanistarchitecture.co.uk/cost-to-build-a-house-uk/>

Shared ownership

- c.32 Shared ownership involves the purchaser buying an initial share in a property, typically of between 25% and 75% (but now set at a minimum of 10%), and paying rent on the share retained by the provider. Shared ownership is flexible in two respects, in the share which can be purchased and in the rent payable on the share retained by the provider. Both of these are variable. The share owned by the occupant can be increased over time through a process known as 'staircasing'.
- c.33 In exceptional circumstances (for example, as a result of financial difficulties, and where the alternative is repossession), and at the discretion of the provider, shared owners may staircase down, thereby reducing the share they own. Shared equity is available to first-time buyers, people who have owned a home previously and council and housing association tenants with a good credit rating whose annual household income does not exceed £80,000.
- c.34 To determine the affordability of shared ownership, calculations are again based on the costs of new build housing as discussed above. The deposit available to the prospective purchaser is assumed to be 10% of the value of the dwelling, and the standard loan to income ratio of 3.5 is used to calculate the income required to obtain a mortgage. The rental component is estimated at 2.5% of the value of the remaining (unsold) portion of the price. The income required to cover the rental component of the dwelling is based on the assumption that a household spends no more than 30% of the income on rent (as for the income threshold for the private rental sector).
- c.35 The affordability threshold for a 25% equity share is calculated as follows:
- A 25% equity share of £309,995 is £77,499;
 - A 10% deposit of £7,750 is deducted, leaving a mortgage value of £69,749;
 - This is divided by the loan to value ratio of 3.5 to give a purchase threshold of £19,928;
 - Rent is charged on the remaining 75% shared ownership equity, i.e. the unsold value of £232,496;
 - The estimated annual rent at 2.5% of the unsold value is £5,812;
 - This requires an income of £19,375 (annual rent multiplied by 3.33 so that no more than 30% of income is spent on rent).
 - The total income required is £39,303 (£19,928 plus £19,375).
- c.36 The same calculation is repeated for equity shares of 10% and 50% producing affordability thresholds of £31,221 and £52,773 respectively, both of which are below the £80,000 cap, above which households are not eligible for the scheme.

Rent to Buy

- c.37 Rent to Buy is a relatively new and less common tenure, which through subsidy allows the occupant to save a portion of their rent, which is intended to be used to build up a deposit to eventually purchase the home. It is therefore estimated to cost the same

as private rents – the difference being that the occupant builds up savings with a portion of the rent.

Appendix D : Affordable Housing need and policy

Affordable Housing estimates

- d.1 In Table D-1 AECOM has calculated, using PPG as a starting point,²⁵ an estimate of the total need for Affordable Rented housing in West St Leonards over the Neighbourhood Plan period. It should, however, be noted that the accuracy of the findings generated by the model is only as strong as the evidence available. However, given the test of proportionality for evidence supporting neighbourhood plans, and the need to be in conformity with Local Authority strategic policies, the calculations set out here are considered a reasonable basis for understanding and planning for neighbourhood-level Affordable Housing need.
- d.2 It should also be noted that figures in Table D-1 are largely dependent on information provided by HBC in its capacity as manager of the local housing waiting list.

²⁵ Paragraphs 024-026 Reference ID: 2a-026-20140306, at <https://www.gov.uk/guidance/housing-and-economic-land-availability-assessment>

Table D-1: Estimate of need for Affordable Housing for rent in West St Leonards

Stage and Step in Calculation	Total	Description
STAGE 1: CURRENT NEED		
1.1 Current households in need	65.0	Latest waiting list data available from MHCLG Local authority housing statistics data return (households in priority need). Pro rata for the NA. Replace with neighbourhood level data if provided by LA.
1.2 Per annum	4.6	Step 1.1 divided by the plan period to produce an annualised figure.
STAGE 2: NEWLY ARISING NEED		
2.1 New household formation	197.7	MHCLG 2018-based household projections for the LA between start and end of plan period. % increase applied to NA.
2.2 Proportion of new households unable to rent in the market	22.1%	(Steps 1.1 + 2.2.1 + 2.2.2) divided by number of households in NA.
2.2.1 Current number of social renters in NA	179.0	2021 Census social rented households
2.2.2 Number of private renters on housing benefits	453.5	Housing benefit caseload. Pro rata for NA.
2.3 New households unable to rent	43.6	Step 2.1 x Step 2.2.
2.4 Per annum	3.1	Step 2.3 divided by plan period.
STAGE 3: TURNOVER OF AFFORDABLE HOUSING		
3.1 Supply of Social/Affordable re-lets (including transfers) %	3%	Assumed proportion of stock re-let each year.
3.2 Supply of Social/Affordable re-lets (including transfers)	5.4	Step 3.1 x NA social rented stock (2.2.1).
NET SHORTFALL (OR SURPLUS) OF RENTED UNITS PER ANNUM		
Overall shortfall (or surplus) per annum	2.4	Step 1.2 + Step 2.4 - Step 3.2
Overall shortfall (or surplus) over the plan period	33.4	(Step 1.1 + Step 2.3) - Step 3.2 * plan period

Source: AECOM model, using Census 2021, English Housing Survey 2018, MHCLG 2018 based household projections and net additions to Affordable Housing stock. Figures may not sum due to rounding.

- d.3 Turning to Affordable Housing providing a route to home ownership, Table D-2 estimates the potential demand in West St Leonards. This model aims to estimate the number of households that might wish to own their own home but cannot afford to. The model is consistent with methods used at Local Authority scale in taking as its starting point households currently living in or expected to enter the private rented sector who are not on housing benefit.
- d.4 There may be other barriers to these households accessing home ownership on the open market, including being unable to save for a deposit, or being unable to afford a

home of the right type/size or in the right location. The model also discounts 25% of households potentially in need, assuming a proportion will be renting out of choice. This assumption is based on consistent results for surveys and polls at the national level which demonstrate that most households (typically 80% or more) aspire to home ownership.²⁶ No robust indicator exists for this area or a wider scale to suggest aspirations may be higher or lower in the NA.

Table D-2: Estimate of the potential demand for Affordable Housing for sale in NA

Stage and Step in Calculation	Total	Description
STAGE 1: CURRENT NEED		
1.1 Current number of renters in NA	789.0	Census 2021 private rented households.
1.2 Percentage renters on housing benefit in LA	57.5%	% of renters in 2021 on Housing Benefit / Universal Credit with housing entitlement
1.3 Number of renters on housing benefits in the NA	453.5	Step 1.1 x Step 1.2.
1.4 Current need (households)	251.6	Current renters minus those on housing benefit and minus 25% assumed to rent by choice. ²⁷
1.5 Per annum	18.0	Step 1.4 divided by plan period.
STAGE 2: NEWLY ARISING NEED		
2.1 New household formation	197.7	LA household projections for plan period (2018 based) pro rated to NA.
2.2 % of households unable to buy but able to rent	8.9%	(Step 1.4 + Step 3.1) divided by number of households in NA.
2.3 Total newly arising need	17.6	Step 2.1 x Step 2.2.
2.4 Total newly arising need per annum	1.3	Step 2.3 divided by plan period.
STAGE 3: SUPPLY OF AFFORDABLE HOUSING		

²⁶ <http://www.ipsos-mori-generations.com/housing.html>

²⁷ The assumption of approximately 25% preferring to rent and 75% preferring to buy is AECOM's judgement, based on national level polls which consistently reveal that most households who prefer home ownership eg <http://www.ipsos-mori-generations.com/housing.html> and informed by our experience across numerous neighbourhood level HNAs. The assumption is based on the fact that some households choose to rent at certain stages in their life (e.g. when young, when needing flexibility in employment market, or when new migrants move into an area). While most households prefer the added security and independence of owning their own home, private renting is nevertheless a tenure of choice at a certain points in many households' journey through the housing market. The actual percentage of preference will differ between areas, being higher in large metropolitan areas with younger households and more new migrants, but lower in other areas. 25% is used as a reasonable proxy and for consistency across HNAs and similar assumptions are used in some larger scale assessments such as LHNAs and SHMAs. If the neighbourhood planning group feel this is not an appropriate assumption in their particular locality they could use the results of a local residents survey to refine or confirm this calculation.

3.1 Supply of Affordable Housing	30.0	Number of shared ownership homes in the NA (Census 2021).
3.2 Supply - intermediate resales	1.5	Step 3.1 x 5% (assumed rate of re-sale).
NET SHORTFALL (OR SURPLUS) PER ANNUM		
Overall shortfall (or surplus) per annum	17.7	(Step 1.5 + Step 2.4) - Step 3.2.
Overall shortfall (or surplus) over the plan period	248.2	(Step 1.4 + Step 2.3) - Step 3.2 * number of years to end of plan period

Source: AECOM model, using Census 2021, English Housing Survey 2018, MHCLG 2018 based household projections and net additions to Affordable Housing stock.

- d.5 There is no policy or legal obligation on the part either of the Local Authority or Neighbourhood Plan to meet Affordable Housing needs in full, though there are tools available to the Steering Group that can help ensure that it is met to a greater extent if resources permit (e.g. the ability to allocate sites for Affordable Housing).
- d.6 It is also important to remember that even after the Neighbourhood Plan is adopted, the assessment of need for Affordable Housing, the allocation of Affordable Rented housing to those in need, and the management of the housing waiting list all remain the responsibility of the Local Authority rather than the neighbourhood planning group.

Affordable Housing policy

- d.7 The following table reviews the relevant factors in developing a policy on the Affordable Housing tenure mix, which inform the recommendation given in the main body of the report.

Table D-3: Wider considerations in developing Affordable Housing mix policy

Consideration	Local Evidence
<p>A. Evidence of need for Affordable Housing:</p> <p>The need for affordable rent and affordable home ownership is not directly equivalent: the former expresses the identified need of a group with acute needs and no alternative options; the latter expresses potential demand from a group who are generally adequately housed in rented accommodation and may not be able to afford the deposit to transition to ownership.</p>	<p>This HNA suggests that the NA requires around 2.4 units of Social/Affordable Rented housing and 17.7 units of affordable home ownership homes per annum over the Neighbourhood Plan period. Both forms of Affordable Housing appear to be valuable in meeting the needs of people on various incomes.</p> <p>The relationship between these figures suggests that affordable home ownership should be prioritised over Affordable Rented housing.</p>
<p>B. Can Affordable Housing needs be met in full?</p>	<p>Although HBC have provided an indication of the scale of housing growth expected within the NA by identifying a number of draft allocations within the</p>

<p>How far the more urgently needed Affordable Rented housing should be prioritised in the tenure mix depends on the quantity of overall housing delivery expected.</p>	<p>NA, amounting to 406 dwellings over the plan period, the sum of allocations is not always the same as an indicative requirement. Given that the sum of all allocations in Hastings amount to less than half of the old nationally calculated housing target for Hastings of 490 homes per year, and well below the new NPPF nationally calculated housing target of 790 homes per year, so the actual amount of homes to be delivered within the NA over the plan period is likely to be higher.</p> <p>The percentage of homes that are expected to be delivered as affordable within the local authority is difficult to determine given that the calculation to determine the requirements rely on knowledge of each development scheme and the brownfield/greenfield status of each site to come forward (see Policy SP2 of the emerging Local Plan).</p> <p>It is therefore difficult to determine whether the forthcoming level of development will be sufficient to account for the identified need in full.</p> <p>Nonetheless, it is known that the major and ongoing development in the NA at the former St Leonards Academy Darwell Campus for 210 dwellings (HS/DS/21/00570 & later variations HS/FA/22/00999) includes commitments for 36 affordable rent and 16 shared ownership dwelling. This scheme alone would account for all expected demand for Affordable Rented housing over the plan period.</p> <p>In terms of Affordable Housing for ownership, with an expected demand of 248.2 units over the plan period, given the Affordable Housing provisions in emerging Policy SP2 range between 25% - 40% based on the size of the scheme and type of site, there would need to be considerably more development than the allocated 409 homes to meet all of the need identified.</p>
<p>C. Government policy (e.g. NPPF) requirements:</p> <p>There is no required tenure mix set out in national policy (NPPF 2024) but local authorities are required to set out the</p>	<p>Implicit prioritisation of Social Rented homes within Affordable Housing policy at the nation level but local authorities have flexibility to set out the proportion needed in their areas. Local Plan tenure mix provides the starting point.</p>

<p>minimum proportion of Social Rented housing needed in their areas as part of their Affordable Housing requirements.</p>	
<p>D. Local Plan policy:</p>	<p>The emerging Local Plan seeks a tenure split of 60% affordable rent to 10% affordable home ownership, with the remaining 30% determined through negotiation, but comprising affordable rent / social rent, shared ownership or any other affordable tenure including intermediate and low cost homes (including First Homes).</p>
<p>E. Viability:</p>	<p>HNAs cannot take into consideration the factors which affect viability in the neighbourhood area or at the site-specific level. Viability issues are recognised in the Local Plan and it is acknowledged that this may affect the provision of Affordable Housing, the mix of tenures provided and the discounts that can be sought on affordable home ownership properties.</p>
<p>F. Funding: The availability of funding to support the delivery of different forms of Affordable Housing may also influence what it is appropriate to provide at a particular point in time or on any one site.</p>	<p>The West St Leonards Neighbourhood Forum may wish to keep this in mind so that it can take up any opportunities to secure funding if they become available.</p>
<p>G. Existing tenure mix in West St Leonards: The current stock of homes in an area, in terms of balance between ownership, rented and affordable provision may be a consideration in the mix of tenures provided on new development sites.</p>	<p>There is a comparatively low number of people who rent from a social landlord in West St Leonards (6.2%), compared to Hastings (14.3%) and England (17.1%), where it is almost three times more common. In line with the local authority and rest of England, shared ownership levels remain relatively low at around 1%.</p>
<p>H. Views of registered providers:</p>	<p>It is not within the scope of this HNA to investigate whether it would be viable for housing associations (registered providers) to deliver and manage Social/Affordable Rented homes in the NA. The funding arrangements available to housing associations will also influence rent levels.</p>

I. Wider policy objectives:	The West St Leonards Neighbourhood Forum may wish to take account of broader policy objectives for West St Leonards and/or the wider borough. These could include, but are not restricted to, policies to attract younger households, families or working age people to the NA. These wider considerations may influence the mix of Affordable Housing provided.
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Table E-2: Tenure and mobility limitations of those aged 65+ in West St Leonards, 2011 (65+ is the closest proxy for 75+ in this data)

Tenure	Day-to-day activities limited a lot		Day-to-day activities limited a little		Day-to-day activities not limited	
All categories	269	26.1%	264	25.6%	497	48.3%
<i>Owned Total</i>	210	24.8%	222	26.2%	414	48.9%
Owned outright	173	25.0%	185	26.7%	335	48.3%
Owned (mortgage) or shared ownership	37	24.2%	37	24.2%	79	51.6%
<i>Rented Total</i>	59	32.1%	42	22.8%	83	45.1%
Social rented	26	44.1%	17	28.8%	16	27.1%
Private rented or living rent free	33	26.4%	25	20.0%	67	53.6%

Source: DC3408EW Health status

HLIN calculations

Table E-3: Recommended provision of specialist housing for older people from the HLIN SHOP toolkit

FORM OF PROVISION	ESTIMATE OF DEMAND PER THOUSAND OF THE RELEVANT 75+ POPULATION
Conventional sheltered housing to rent	60
Leasehold sheltered housing	120
Enhanced sheltered housing (divided 50:50 between that for rent and that for sale) ³⁶	20
Extra care housing for rent	15
Extra care housing for sale	30
Housing based provision for dementia	6

Source: Housing LIN SHOP Toolkit

e.3 As Table 6-1 in the main report shows, West St Leonards is forecast to see an increase of 442 individuals aged 75+ by the end of the Neighbourhood Plan period. According to the HLIN tool, this translates into need as follows:

- Conventional sheltered housing to rent = $60 \times 0.442 = 27$
- Leasehold sheltered housing = $120 \times 0.442 = 53$

- Enhanced sheltered housing (divided 50:50 between that for rent and that for sale)
= $20 \times 0.442 = 8.83$
- Extra care housing for rent = $15 \times 0.442 = 6.63$
- Extra care housing for sale = $30 \times 0.442 = 13.25$
- Housing based provision for dementia = $6 \times 0.442 = 2.65$

Appendix F : Housing Needs Assessment

Glossary

Adoption

This refers to the final confirmation of a local plan by a local planning authority.

Affordability

The terms 'affordability' and 'Affordable Housing' have different meanings. 'Affordability' is a measure of whether housing may be afforded by certain groups of households. 'Affordable Housing' refers to particular products outside the main housing market.

Affordability Ratio

Assessing affordability involves comparing housing costs against the ability to pay. The ratio between lower quartile house prices and the lower quartile income or earnings can be used to assess the relative affordability of housing. The Ministry for Housing, Community and Local Governments publishes quarterly the ratio of lower quartile house price to lower quartile earnings by local authority (LQAR) as well as median house price to median earnings by local authority (MAR) e.g. income = £25,000, house price = £200,000. House price: income ratio = $\text{£}200,000/\text{£}25,000 = 8$, (the house price is 8 times income).

Affordable Housing (NPPF Definition)

Affordable Housing: housing for sale or rent, for those whose needs are not met by the market (including housing that provides a subsidised route to home ownership and/or is for essential local workers); and which complies with one or more of the following definitions:

- a) Social Rent: meets all of the following conditions: (a) the rent is set in accordance with the Government's rent policy for Social Rent; (b) the landlord is a registered provider; and (c) it includes provisions to remain at an affordable price for future eligible households, or for the subsidy to be recycled for alternative Affordable Housing provision.
- b) Other Affordable Housing for rent: meets all of the following conditions: (a) the rent is set in accordance with the Government's rent policy for affordable Rent, or is at least 20% below local market rents (including service charges where applicable); (b) the landlord is a registered provider, except where it is included as part of a Build to Rent scheme (in which case the landlord need not be a registered provider); and (c) it includes provisions to remain at an affordable price for future eligible households, or for the subsidy to be recycled for alternative Affordable Housing provision. For Build to Rent schemes Affordable Housing for rent is expected to be the normal form of Affordable Housing provision (and, in this context, is known as Affordable Private Rent).
- c) Discounted market sales housing: is that sold at a discount of at least 20% below local market value. Eligibility is determined with regard to local incomes and local house prices. Provisions should be in place to ensure housing remains at a discount for future eligible households.

d) Other affordable routes to home ownership: is housing provided for sale that provides a route to ownership for those who could not achieve home ownership through the market. It includes shared ownership, relevant equity loans, other low cost homes for sale (at a price equivalent to at least 20% below local market value) and rent to buy (which includes a period of intermediate rent). Where public grant funding is provided, there should be provisions for the homes to remain at an affordable price for future eligible households, or for any receipts to be recycled for alternative Affordable Housing provision, or refunded to Government or the relevant authority specified in the funding agreement.

Affordable Rented housing

Rented housing let by registered providers of social housing to households who are eligible for Social Rented housing. Affordable Rent is not subject to the national rent regime but is subject to other rent controls that require a rent of no more than 80% of the local market rent (including service charges, where applicable). The national rent regime is the regime under which the social rents of tenants of social housing are set, with particular reference to the Guide to Social Rent Reforms (March 2001) and the Rent Influencing Regime Guidance (October 2001). Local market rents are calculated using the Royal Institution for Chartered Surveyors (RICS) approved valuation methods³⁰.

Age-Restricted General Market Housing

A type of housing which is generally for people aged 55 and over and active older people. It may include some shared amenities such as communal gardens but does not include support or care services.

Annual Monitoring Report

A report submitted to the Government by local planning authorities assessing progress with and the effectiveness of a Local Development Framework.

Basic Conditions

The Basic Conditions are the legal tests that are considered at the examination stage of neighbourhood development plans. They need to be met before a plan can progress to referendum.

Backlog need

The backlog need constitutes those households who are eligible for Affordable Housing, on account of homelessness, over-crowding, concealment or affordability, but who are yet to be offered a home suited to their needs.

Bedroom Standard³¹

The bedroom standard is a measure of occupancy (whether a property is overcrowded or under-occupied, based on the number of bedrooms in a property and the type of household in residence). The Census overcrowding data is based on occupancy rating (overcrowding by

³⁰ The Tenant Services Authority has issued an explanatory note on these methods at <http://www.communities.gov.uk/documents/planningandbuilding/pdf/1918430.pdf>

³¹ See <https://www.gov.uk/government/statistics/english-housing-survey-2011-to-2012-household-report>

number of rooms not including bathrooms and hallways). This tends to produce higher levels of overcrowding/ under occupation. A detailed definition of the standard is given in the Glossary of the EHS Household Report.

Co-living

Co-living denotes people who do not have family ties sharing either a self-contained dwelling (i.e., a 'house share') or new development akin to student housing in which people have a bedroom and bathroom to themselves, but share living and kitchen space with others. In co-living schemes each individual represents a separate 'household'.

Community-led developments (NPPF definition)

A development taken forward by, or with, a not-for-profit organisation, that is primarily for the purpose of meeting the needs of its members or the wider local community, rather than being a primarily commercial enterprise. The organisation should be created, managed and democratically controlled by its members, and membership of the organisation should be open to all beneficiaries and prospective beneficiaries of that organisation. It may take any one of various legal forms including a co-operative society, community benefit society and company limited by guarantee. The organisation should own, manage or steward the development in a manner consistent with its purpose, potentially through a mutually supported arrangement with a Registered Provider of Social Housing. The benefits of the development to the community should be clearly defined and consideration given to how those benefits can be protected over time, including in the event of the organisation being wound up.

Community Right to Build Order

A community right to build order is a special kind of neighbourhood development order, granting planning permission for small community development schemes, such as housing or new community facilities. Local community organisations that meet certain requirements or parish/town councils are able to prepare community right to build orders. The NPPF 2024 specifically defines it as follows: An Order made by the local planning authority (under the Town and Country Planning Act 1990) that grants planning permission for a site specific development proposal or classes of development.

Concealed Families (Census definition)³²

The 2021 Census defined a concealed family as one with young adults living with a partner and/or child/children in the same household as their parents, older couples living with an adult child and their family or unrelated families sharing a household. A single person cannot be a concealed family; therefore one older parent living with their adult child and family or an adult child returning to the parental home is not a concealed family; the latter are reported in an ONS analysis on increasing numbers of young adults living with parents.

³² See

http://webarchive.nationalarchives.gov.uk/20160107160832/http://www.ons.gov.uk/ons/dcp/171776_350282.pdf

Equity Loans/Shared Equity

An equity loan which acts as a second charge on a property. For example, a household buys a £200,000 property with a 10% equity loan (£20,000). They pay a small amount for the loan and when the property is sold e.g. for £250,000 the lender receives 10% of the sale cost (£25,000). Some equity loans were available for the purchase of existing stock. The current scheme is to assist people to buy new build.

Extra Care Housing or Housing-With-Care

Housing which 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 included in retirement communities or villages - the intention is for residents to benefit from varying levels of care as time progresses.

Fair Share

'Fair share' is an approach to determining housing need within a given geographical area based on a proportional split according to the size of the area, the number of homes in it, or its population.

First Homes

First Homes is another form of discounted market housing which will provide a discount of at least 30% on the price of new homes, introduced in 2021. These homes are available to first time buyers as a priority but other households will be eligible depending on agreed criteria. A more detailed explanation of First Homes and its implications is provided in the main body of the HNA.

Habitable Rooms

The number of habitable rooms in a home is the total number of rooms, excluding bathrooms, toilets and halls.

Household Reference Person (HRP)

The concept of a Household Reference Person (HRP) was introduced in the 2001 Census (in common with other government surveys in 2001/2) to replace the traditional concept of the head of the household. HRPs provide an individual person within a household to act as a reference point for producing further derived statistics and for characterising a whole household according to characteristics of the chosen reference person.

Housing Market Area

A housing market area is a geographical area defined by household demand and preferences for all types of housing, reflecting the key functional linkages between places where people live and work. It might be the case that housing market areas overlap.

The extent of the housing market areas identified will vary, and many will in practice cut across various local planning authority administrative boundaries. Local planning authorities should work with all the other constituent authorities under the duty to cooperate.

Housing Need (NPPG 2024 definition)

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 such as site allocations.

Housing Needs Assessment

A Housing Needs Assessment (HNA) is an assessment of housing needs at the Neighbourhood Area level.

Housing Products

Housing products simply refers to different types of housing as they are produced by developers of various kinds (including councils and housing associations). Housing products usually refers to specific tenures and types of new build housing.

Housing Requirement (NPPF 2024 Definition)

The housing requirement is the minimum number of homes that a plan seeks to provide during the plan period. Once local housing need has been assessed, as set out in this guidance, authorities should then make an assessment of the amount of new homes that can be provided in their area. This should be justified by evidence on land availability, constraints on development and any other relevant matters.

Housing Size (Census Definition)

Housing size can be referred to either in terms of the number of bedrooms in a home (a bedroom is defined as any room that was intended to be used as a bedroom when the property was built, any rooms permanently converted for use as bedrooms); or in terms of the number of rooms, excluding bathrooms, toilets halls or landings, or rooms that can only be used for storage. All other rooms, for example, kitchens, living rooms, bedrooms, utility rooms, studies and conservatories are counted. If two rooms have been converted into one they are counted as one room. Rooms shared between more than one household, for example a shared kitchen, are not counted.

Housing Type (Census Definition)

This refers to the type of accommodation used or available for use by an individual household (i.e. detached, semi-detached, terraced including end of terraced, and flats). Flats are broken down into those in a purpose-built block of flats, in parts of a converted or shared house, or in a commercial building.

Housing Tenure (Census Definition)

Tenure provides information about whether a household rents or owns the accommodation that it occupies and, if rented, combines this with information about the type of landlord who owns or manages the accommodation.

Income Threshold

Income thresholds are derived as a result of the annualisation of the monthly rental cost and then asserting this cost should not exceed 35% of annual household income.

Intercensal Period

This means the period between the last two Censuses, i.e. between years 2001 and 2011.

Intermediate Housing

Intermediate housing is homes for sale and rent provided at a cost above social rent, but below market levels subject to the criteria in the Affordable Housing definition above. These can include shared equity (shared ownership and equity loans), other low-cost homes for sale and intermediate rent, but not Affordable Rented housing. Homes that do not meet the above definition of Affordable Housing, such as 'low-cost market' housing, may not be considered as Affordable Housing for planning purposes.

Life Stage modelling

Life Stage modelling is forecasting need for dwellings of different sizes by the end of the Neighbourhood Plan period on the basis of changes in the distribution of household types and key age brackets (life stages) within the NA. Given the shared behavioural patterns associated with these metrics, they provide a helpful way of understanding and predicting future community need. This data is not available at neighbourhood level so LPA level data is employed on the basis of the NA falling within its defined Housing Market Area.

Life-time Homes

Dwellings constructed to make them more flexible, convenient adaptable and accessible than most 'normal' houses, usually according to the Lifetime Homes Standard, 16 design criteria that can be applied to new homes at minimal cost: <http://www.lifetimehomes.org.uk/>. Lifetime Homes standards have been broadly wrapped up into the M4(2) optional building regulations standards which relate to accessibility and adaptability of dwellings.

Life-time Neighbourhoods

Lifetime neighbourhoods extend the principles of Lifetime Homes into the wider neighbourhood to ensure the public realm is designed in such a way to be as inclusive as possible and designed to address the needs of older people, for example providing more greenery and more walkable, better connected places.

Local Development Order

An Order made by a local planning authority (under the Town and Country Planning Act 1990) that grants planning permission for a specific development proposal or classes of development.

Local Enterprise Partnership

A body, designated by the Secretary of State for Communities and Local Government, established for the purpose of creating or improving the conditions for economic growth in an area.

Local Planning Authority

The public authority whose duty it is to carry out specific planning functions for a particular area. All references to local planning authority apply to the District Council, London Borough Council, County Council, Broads Authority, National Park Authority or the Greater London Authority, to the extent appropriate to their responsibilities.

Local Plan

This is the plan for the future development of the local area, drawn up by the local planning authority in consultation with the community. In law this is described as the development plan documents adopted under the Planning and Compulsory Purchase Act 2004. Current core strategies or other planning policies form part of the Local Plan and are known as 'Development Plan Documents' (DPDs).

Lower Quartile

The bottom 25% value, i.e. of all the properties sold, 25% were cheaper than this value and 75% were more expensive. The lower quartile price is used as an entry level price and is the recommended level used to evaluate affordability; for example for first time buyers.

Lower Quartile Affordability Ratio

The Lower Quartile Affordability Ratio reflects the relationship between Lower Quartile Household Incomes and Lower Quartile House Prices, and is a key indicator of affordability of market housing for people on relatively low incomes.

Market Housing

Market housing is housing which is built by developers (which may be private companies or housing associations, or Private Registered Providers), for the purposes of sale (or rent) on the open market.

Mean (Average)

The mean or the average is, mathematically, the sum of all values divided by the total number of values. This is the more commonly used "average" measure as it includes all values, unlike the median.

Median

The middle value, i.e. of all the properties sold, half were cheaper and half were more expensive. This is sometimes used instead of the mean average as it is not subject to skew by very large or very small statistical outliers.

Median Affordability Ratio

The Lower Quartile Affordability Ratio reflects the relationship between Median Household Incomes and Median House Prices and is a key indicator of affordability of market housing for people on middle-range incomes.

Mortgage Ratio

The mortgage ratio is the ratio of mortgage value to income which is typically deemed acceptable by banks. Approximately 75% of all mortgage lending ratios fell below 4 in recent years³³, i.e. the total value of the mortgage was less than 4 times the annual income of the person who was granted the mortgage.

Neighbourhood Development Order (NDO)

An NDO will grant planning permission for a particular type of development in a particular area. This could be either a particular development, or a particular class of development (for example retail or housing). A number of types of development will be excluded from NDOs, however. These are minerals and waste development, types of development that, regardless of scale, always need Environmental Impact Assessment, and Nationally Significant Infrastructure Projects.

Neighbourhood plan

A plan prepared by a Parish or Town Council or Neighbourhood Forum for a particular neighbourhood area (made under the Planning and Compulsory Purchase Act 2004).

Older People

People over retirement age, including the active, newly-retired through to very frail older people, whose housing needs can encompass accessible, adaptable general needs housing for those looking to downsize from family housing and the full range of retirement and specialised housing for those with support or care needs.

Output Area/Lower Super Output Area/Middle Super Output Area

An output area is the lowest level of geography for publishing statistics, and is the core geography from which statistics for other geographies are built. Output areas were created for England and Wales from the 2001 Census data, by grouping a number of households and populations together so that each output area's population is roughly the same. 175,434 output areas were created from the 2001 Census data, each containing a minimum of 100 persons with an average of 300 persons. Lower Super Output Areas consist of higher geographies of between 1,000-1,500 persons (made up of a number of individual Output Areas) and Middle Super Output Areas are higher than this, containing between 5,000 and 7,200 people, and made up of individual Lower Layer Super Output Areas. Some statistics are only available down to Middle Layer Super Output Area level, meaning that they are not available for individual Output Areas or parishes.

³³ See <https://www.which.co.uk/news/2017/08/how-your-income-affects-your-mortgage-chances/>

Overcrowding

There is no single agreed definition of overcrowding, however, utilising the Government's bedroom standard, overcrowding is deemed to be in households where there is more than one person in the household per room (excluding kitchens, bathrooms, halls and storage areas). As such, a home with one bedroom and one living room and one kitchen would be deemed overcrowded if three adults were living there.

Planning Condition

A condition imposed on a grant of planning permission (in accordance with the Town and Country Planning Act 1990) or a condition included in a Local Development Order or Neighbourhood Development Order.

Planning Obligation

A legally enforceable obligation entered into under section 106 of the Town and Country Planning Act 1990 to mitigate the impacts of a development proposal.

Purchase Threshold

Purchase thresholds are calculated by netting 10% off the entry house price to reflect purchase deposit. The resulting cost is divided by 4 to reflect the standard household income requirement to access mortgage products.

Proportionate and Robust Evidence

Proportionate and robust evidence is evidence which is deemed appropriate in scale, scope and depth for the purposes of neighbourhood planning, sufficient so as to meet the Basic Conditions, as well as robust enough to withstand legal challenge. It is referred to a number of times in the PPG and its definition and interpretation relies on the judgement of professionals such as Neighbourhood Plan Examiners.

Private Rented

The Census tenure private rented includes a range of different living situations in practice, such as private rented/ other including households living "rent free". Around 20% of the private rented sector are in this category. This could mean people whose rent is paid by their employer, including some people in the armed forces. Some housing association tenants may also have been counted as living in the private rented sector because of confusion about what a housing association is.

Retirement Living or Sheltered Housing

Housing for older people which 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.

Residential Care Homes and Nursing Homes

Housing for older people comprising of 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.

Rightsizing

Households who wish to move into a property that is a more appropriate size for their needs can be said to be rightsizing. This is often used to refer to older households who may be living in large family homes but whose children have left, and who intend to rightsize to a smaller dwelling. The popularity of this trend is debatable as ties to existing communities and the home itself may outweigh issues of space. Other factors, including wealth, health, status and family circumstance also need to be taken into consideration, and it should not be assumed that all older households in large dwellings wish to rightsize.

Rural Exception Sites

Small sites used for Affordable Housing in perpetuity where sites would not normally be used for housing. Rural exception sites seek to address the needs of the local community by accommodating households who are either current residents or have an existing family or employment connection. Small numbers of market homes may be allowed at the local authority's discretion, for example where essential to enable the delivery of affordable dwellings without grant funding.

Shared Ownership

Housing where a purchaser part buys and part rents from a housing association or local authority. Typical purchase share is between 25% and 75% (though this was lowered in 2021 to a minimum of 10%), and buyers are encouraged to buy the largest share they can afford. Generally applies to new build properties, but re-sales occasionally become available. There may be an opportunity to rent at intermediate rent level before purchasing a share in order to save/increase the deposit level

Sheltered Housing³⁴

Sheltered housing (also known as retirement housing) means having your own flat or bungalow in a block, or on a small estate, where all the other residents are older people (usually over 55). With a few exceptions, all developments (or 'schemes') provide independent, self-contained homes with their own front doors. There are many different types of scheme, both to rent and to buy. They range in size from studio flats (or 'bedsits') through to 2 and 3 bedroomed. Properties in most schemes are designed to make life a little easier for older people - with features like raised electric sockets, lowered worktops, walk-in showers, and so on. Some will usually be designed to accommodate wheelchair users. And they are usually linked to an emergency alarm service (sometimes called 'community alarm service') to call help if needed. Many schemes also have their own 'manager' or 'warden', either living on-site or nearby, whose job is to manage the scheme and help arrange any services residents

³⁴ See <http://www.housingcare.org/jargon-sheltered-housing.aspx>

need. Managed schemes will also usually have some shared or communal facilities such as a lounge for residents to meet, a laundry, a guest flat and a garden.

Strategic Housing Land Availability Assessment

A Strategic Housing Land Availability Assessment (SHLAA) is a document prepared by one or more local planning authorities to establish realistic assumptions about the availability, suitability and the likely economic viability of land to meet the identified need for housing over the Neighbourhood Plan period. SHLAAs are sometimes also called LAAs (Land Availability Assessments) or HELAAs (Housing and Economic Land Availability Assessments) so as to integrate the need to balance assessed housing and economic needs as described below.

Strategic Housing Market Assessment (former NPPF 2012 Definition)

A Strategic Housing Market Assessment (SHMA) is a document prepared by one or more local planning authorities to assess their housing needs under the 2012 version of the NPPF, usually across administrative boundaries to encompass the whole housing market area. SHMAs generally identify the scale and mix of housing and the range of tenures the local population likely to be needed over the Neighbourhood Plan period. Sometimes SHMAs are combined with Economic Development Needs Assessments to create documents known as HEDNAs (Housing and Economic Development Needs Assessments).

Specialist Housing for Older People

Specialist housing for Older People, sometimes known as specialist accommodation for older people, encompasses a wide range of housing types specifically aimed at older people, which may often be restricted to those in certain older age groups (usually 55+ or 65+). This could include residential institutions, sometimes known as care homes, sheltered housing, extra care housing, retirement housing and a range of other potential types of housing which has been designed and built to serve the needs of older people, including often providing care or other additional services. This housing can be provided in a range of tenures (often on a rented or leasehold basis).

Social Rented housing

Social Rented housing is owned by local authorities and private registered providers (as defined in Section 80 of the Housing and Regeneration Act 2008.). Guideline target rents for this tenure are determined through the national rent regime. It may also be owned by other persons and provided under equivalent rental arrangements to the above, as agreed with the local authority or with Homes England.³⁵

³⁵ See

<http://www.communities.gov.uk/documents/planningandbuilding/doc/1980960.doc#Housing>

