

# Lewes District

Local Housing Needs Assessment (LHNA) 2023

FINAL REPORT

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## Quality information

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**List of acronyms used in the text:**

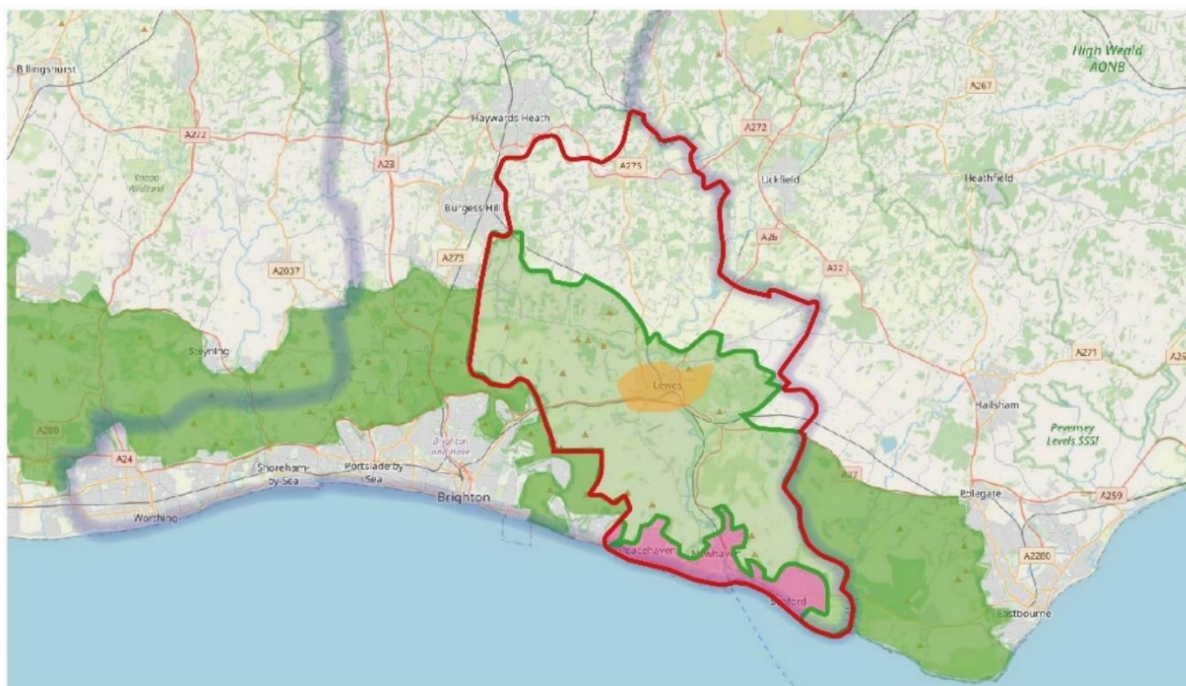
DLUHC	Department for Levelling Up, Housing and Communities (formerly MHCLG)
HRF	Housing Requirement Figure (the total number of homes the Local Plan area is expected to plan for, usually supplied by LPAs)
HLIN	Housing Learning and Improvement Network
HRP	Household Reference Person
LDC	Lewes District Council
LHN	Local Housing Need
LHNA	Local Housing Needs Assessment
LPA	Local Planning Authority
LLP	Lewes Local Plan
NPPF	National Planning Policy Framework
ONS	Office for National Statistics
PPG	Planning Practice Guidance
PRS	Private Rented Sector
SDLP	South Downs Local Plan
SDNP	South Downs National Park
SDNPA	South Downs National Park Authority
SHMA	Strategic Housing Market Assessment
SPBA	Strategic Planning Board Area
VOA	Valuation Office Agency






# Key Findings

## The Housing Market Area

- Lewes district sits within a housing market area which is centred on Brighton and includes other authority areas in both East and West Sussex. Lewes district is also linked to both Eastbourne and Wealden in terms of household migration and travel to work.
- Part of Lewes district falls within the South Downs National Park, including Lewes town. The area within the SDNP is covered by the South Downs National Park Planning Authority. The SDNPA is commissioning a SHMA/LHNA for the whole of the SDNP area, including that part of Lewes which sits within it. Map E.1 presents the geographies included in this LHNA.

**Map E.1: Geographies in the Lewes District LHNA**



- |  |   |
|--|---|
|  Lewes District                         |  Coastal Sub-District Area |
|  South Downs National Park              |  Town Sub-District Area    |
|  Lewes inside South Downs National Park |   |
|  Greater Brighton Housing Market Area   |   |

Note that England and the South East are not shown due to scale. The South East is shown in the inset map

The Greater Brighton and Coastal West Sussex Strategic Planning Board Area also includes other parts of West Sussex shown to the west on this map, and is shown in the inset map

The Rural Sub-District Area covers the parts of the Lewes District not covered by the Coastal Sub-District Area and the Town Sub-District Area

Source: AECOM

- There are three meaningful sub district geographies within the district which cut across the SDNP boundaries and can be considered sub markets because of their different characteristics. These are Lewes town (within the SDNP), the coastal area (outside of the SDNP) and the rural area (cutting across the part of the district inside and outside the SDNP).

## Overall Housing Need

- The National Planning Policy Framework (2021) and Planning Practice Guidance sets out a prescriptive approach to determining the minimum level of overall housing needed in all local authority areas. The calculation is known as the 'Standard Method' and takes household projections for the borough and uplifts them to take account of affordability pressures. Proposed changes to the NPPF were published for consultation in December 2022. Whilst these proposals do not include changes to the standard method calculation, Government has also set out its intention to review the household projections which are the starting point for the calculation to take account of Census 2021.
- Lewes district's standard method figure is 782 additional homes per annum (as at March 2023).<sup>1</sup> The Council has proposed to apportion this need to the part of the district outside of the SDNPA on the basis of its share of the existing dwelling stock (based on LDC data). The figure for the for the Lewes Local Plan area (area outside of the SDNP) is 602 dwellings per annum.
- However, population or dwelling stock data from Census 2021 is now available. If this is used to disaggregate the housing need figure, this would result in a figure of 574 dwellings for the Lewes Local Plan area (area outside of the SDNP). Given the Census data appears aligned and it is available from a readily accessible data source, AECOM would suggest this method might be preferred in terms of apportionment.
- The use of 2018 based projections allows a simple test of the standard method results based on projections which appear closer to the Census outturn. If 2018 based projections are used instead of 2014 based projections, the housing need figure resulting from the current standard method process would be 517 (rounded) dwellings in Lewes district, 397 (rounded) dwellings in the part of Lewes district outside of the SDNP.
- As discussed above, if the apportionment to Lewes Local Plan area (outside the SDNP) is done on the basis of the Census 2021 share of population or dwellings, the figure would be 574 (rounded) under the existing standard method, or 379 (rounded) if 2018 based household projections are used.
- This is not a housing requirement however and this must be determined by the Council taking into account other planning considerations. The housing requirement

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<sup>1</sup> Lewes District Council calculated its housing need figure using the standard method in 2022. This produced a figure of 782 homes per annum. AECOM verified this figure as part of this LHNA. AECOM has since updated this figure for 2023 and considered the implication of using 2018 based household projections (see Section 4 of this LHNA).

for Lewes Local Plan area will also include conversations (under the ‘duty to cooperate’) with the SDNPA and other neighbouring authority areas.

## People and Households

- Census 2021 confirms there are 99,009<sup>2</sup> people and 43,700 households in Lewes district, with an average household size of 2.3 people per household. This compares to 97,705 people and 42,181 households in 2011, with the same average household size of 2.3 people per household. In 2021, 73.4% of the population live in the part of Lewes district outside of the SDNP (the Lewes Local Plan area).
- The population of Lewes district has an older bias compared to the population of the housing market area, South East region, and England as a whole and is ageing. The proportion of people aged 85+ in 2021 (4.1%) is greater than the proportion in 2011 (3.6%), with increases in the 65-84 age group from 19.1% to 22.4% over the decade. However, the ageing of the population has not been quite as pronounced as expected by ONS population projections (including the 2018 based projections) which were produced in between Censuses.
- There has been some decline in the share of the population in the younger working age population aged 25-44 between 2011 and 2021. The number of individuals in the youngest age groups also fell over the decade with a 1.5% decline in 0-14 year-olds and 9.1% decline in 15-24 year-olds. All of the larger comparative geographies had an increase in the number of the youngest age category.
- Projections suggest ageing will continue with a 40.6% increase in the number of older households (aged 65+) over the plan period. However, this growth projection may be refined when more detailed data on household composition is released from the Census 2021.
- The population of Lewes district is notably older than the wider HMA (which includes Brighton). Although there are fewer families and children in Lewes than the wider region, families with dependent children make up a substantial group within the population of the district (23.4% in 2021). There is little difference in the proportion of children (aged 0-14) and the proportion of households with dependent children within the different sub-areas of the district.
- The district picture masks large variations in the make of the population within Lewes’ sub areas, including within and outside the SDNP and in the coastal, town and rural area.
- Approximately 27% of the district’s population fell within the SDNP in 2021 according to the Census 2021, with the remaining 73% not within the national park. The area

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<sup>2</sup> There is a slight discrepancy in the 2021 Census figures for the total population of the district. Dataset TS007 (released 02/11/2022) gave a total population figure of 99,900 for Lewes district whilst dataset TS007A (released in 2023) gave a total population for Lewes District of 99,909. The latter dataset released data at a localised level (with the former only available at a larger scale) and so has been used within the ‘Demand: People and Households’ chapter (to ensure the sub-areas add up to the entire District. The district-level calculations in the chapters such as ‘Specialist Housing for Older People’ and ‘Supported Housing for Vulnerable People’ use the 99,900 figure as they were updated with 2021 Census data before the release of the latter dataset.



outside of the SDNP had a greater proportion of the population aged 65+ (26.8%), compared to district as a whole (26.5%).

- It is worth noting the varied demographic make-up of the different areas within Lewes District in 2021 - the coastal region, the rural area, and Lewes town (see Map E-1 above):
  - The coastal area has a greater proportion of the older population, especially when comparing to Lewes town, with 23.4% of the coastal population aged 65-84 compared to 18.8% of the population in the town.
  - The rural area (the area of the district outside of Lewes town and the Coastal area) has the greatest proportion of the oldest households, with 4.6% of people aged 85+ compared to 4.1% in the coastal area and 3.1% in the town area.
  - Lewes town has the greatest proportion of the older working population, aged 45-64, and therefore likely a greater proportion of established families. The share of the population aged 45-64 in the town in 2021 was 30.8%, compared to 29.2% in the rural area, and 26.8% in the coastal area.
  - Younger working age individuals, aged 25-44, tend to slightly favour the town, at 21.3% of the population, compared to 21.1% in the coastal areas and 18.5% in the rural areas. This may be due to better availability of rented accommodation for younger households. There will likely also be greater access to local jobs and amenities, such as schools, suitable for families in the town.

## Housing Stock and Supply

- Current estimates suggest there are around 45,100 homes in Lewes district (VOA 2021), with 2021 Census data indicating that there were around 43,700 households in the district. The majority are occupied by owner occupiers (71.7% in 2021), substantially higher than the Greater Brighton HMA (63.1%) as well as the region and England. 16.9% of households live in private rented homes and 10.9% social rented. The rented sector overall is small compared to comparison areas.

**Table E-1: Existing Size Mix of Homes in Lewes district, 2021**

Area	1 bedroom	2 bedrooms	3 bedrooms	4+ bedrooms
Lewes District	10.9%	28.5%	38.0%	22.7%
Lewes inside SDNP	10.6%	27.4%	36.4%	25.6%
Lewes outside SDNP	11.0%	28.8%	38.5%	21.7%
Coastal Sub-Area	11.9%	31.1%	38.2%	18.7%
Town Sub-Area	14.0%	28.9%	35.9%	21.2%
Rural Sub-Area	5.7%	21.1%	38.8%	34.5%

Source: Census 2021

- The existing size mix of housing is biased towards larger property types – houses and bungalows, with flats and apartments making up a smaller proportion of the stock compared to the wider geographies (18.8% in Lewes, compared to 21.6% in

the South East and 22.2% in England as a whole). The proportion of bungalows in Lewes (21.3%) is double those of comparison areas. In the last 10 years, households have increased occupancy of larger 4+ bedroom dwellings.

- Outside of the SDNP, the proportion of detached houses is higher (38.3%) compared to inside the SDNP (25.7%). The share of semi-detached homes is similar but the proportion of terraces is much higher inside the SDNP (26.4% compared to 15.2%) because of the stock mix in Lewes town.
- Lewes town has a greater proportion of rented households, with most of the social rented stock located here. The housing stock is also smaller, on average, with more terraces and flats. The rural area has a higher proportion of larger properties (almost three quarters of households lived in 3-bedroom plus dwellings in 2021) with correspondingly higher levels of owner occupation. The coastal area has the highest proportion of 2-bedroom dwellings (almost one third of properties). The proportion of flats is slightly below Lewes town (just over 20% of the stock), in part due to coastal apartment schemes.

## The Size Mix of New Homes

- AECOM has modelled the indicative mix of new homes likely to be needed in Lewes district based on demographic change, current occupancy patterns and the profile of the existing stock. The estimates suggest prioritisation of mid-sized homes (2-3 bedrooms) but with continued provision of smaller and larger dwellings to meet changing demographic needs, though this varies by tenure, with market housing generally needing to be larger.

**Table E-2: Indicative mix of homes needed at the end of the Plan Period to 2040 in Lewes district by broad tenure**

Number of bedrooms	Market	Affordable Rented	Overall
<b>1 bedroom</b>	7.1%	55.2%	12.6%
<b>2 bedrooms</b>	38.9%	30.7%	38.0%
<b>3 bedrooms</b>	38.9%	13.3%	36.0%
<b>4+ bedrooms</b>	15.1%	0.8%	13.5%
<b>Total</b>	100.0%	100.0%	100.0%

*Source: AECOM modelling using Census 2011 and ONS 2018 based household projections. Note 'market' includes owner occupied, private rented and affordable home ownership tenures.*

- Overall, the estimates based on demographic trends suggests: 13% 1-beds, 38% 2-beds, 36% 3-beds and 14% 4+ beds. The mix for market housing gives less emphasis to 1-beds (7%) and more to larger properties (54% 3+ beds).
- The affordable rented mix in the LHNA modelling suggests the need for smaller homes. However, given the greatest pressures currently rest on larger units, the mix could reasonably be adjusted to allow for greater diversity and prioritisation of some larger (3-bedroom plus) properties.

## Tenure Change

- At 71.7%, the proportion of home ownership in Lewes district in 2021 was higher than the Greater Brighton HMA, Greater Brighton & Coastal West Sussex SPBA, the South East and England. Owner occupation is slightly higher outside of the SDNP area, with the coastal and rural areas having higher proportions of owners, consistent with their older populations. In contrast, Lewes town, inside the SDNP has higher levels of private and social renting and therefore lower proportion of owner occupation. Note that the share of home ownership in Lewes District in 2011 was 72.7% and so that proportion of owners has fallen over the last 10 years.
- The social/affordable rented sector in the district is small, at 10.9% of households. This is lower than the Greater Brighton HMA, the Strategic Planning Board Area, South East and England. The area inside the SDNP, driven by Lewes town, has 12.6% social/affordable housing (16.3% in the town) – a proportion similar to the South East region. Conversely, levels in the coastal and rural areas are significantly lower than the town.
- The level of private renting is broadly similar across the district sub-areas (around 16% - 18%% in 2021) but slightly higher in the rural sub-area (14.0%). The share of households living in the private rented sector has grown since 2011 in all of the benchmark areas.
- The delivery of new homes since 2011 suggests that the proportion of affordable homes (rented and ownership) is likely to have remained stable in terms of its share of dwellings. 2021 Census data shows that that in Lewes district the number of households living in shared ownership dwellings increased by 43.9%, with the number of households socially renting increasing by 3.6%. The number of households living in the private rented sector grew by 20.9% compared to an increase of 29.0% nationally. This was more pronounced in Lewes coastal sub-area (+24.4%).
- In 2021, there were 3,279 households in Lewes district claiming housing benefit and living in the private rented sector.<sup>3</sup> Being unable to afford to rent in the market, they can be considered in need of affordable housing. However, some will be receiving only small amounts of housing benefit, or may prefer living in the PRS because they have more flexibility over their location. These low income households are particularly vulnerable to increasing rental costs with housing benefits often not sufficiently covering their rents as well as wider rises in the cost of living. The availability of cheaper PRS properties also restricts access to affordable options in Lewes district.

## Household Incomes in Lewes District

- The median average income of households in Lewes district is £37,800. Incomes are comparatively higher than comparison benchmark areas but this masks

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<sup>3</sup> Note that more up to date data is available but 2021 is used for consistency with other inputs in the LHNA and in particular the affordable housing need assessment.

variability amongst households and does not take account of household wealth or housing equity.

- CACI estimates of lower quartile incomes for Lewes district suggest household incomes of around £21,660. As with the average income data discussed above, the lower quartile income for Lewes district is higher than for East Sussex as a whole. This estimate takes into account single and dual earnings households and so is likely to be more useful than individual earnings data.
- The most common income band is £15,000-£20,000 indicating that a substantial proportion of households have low incomes. However, a substantial proportion of existing households with these low incomes will be older home owners who own their homes outright and hold significant equity.
- A greater proportion of households are considered 'wealthy achievers' and 'comfortably off' in Lewes district than across the UK as a whole according to research undertaken for SHELTER, using ACORN data. However, a small but notable proportion of the population are described as 'prudent pensioners' and 'struggling families' (7% in each), where financial resources are more limited.

## Prices and Rents in Lewes District

- The median house price in Lewes district at £340,000 is lower than wider housing market area, albeit higher than in East Sussex as a whole and substantially higher than the national average (£275,551). However, house prices vary within the district from £330,000 in the coastal area, £445,000 in Lewes town and £498,975 in the rural area. Prices are higher inside the SDNP (median average of £451,000) compared to £347,500 outside the SDNP. When prices are broken down by type of property, Lewes town exhibits highest prices across all dwelling types except flats.
- Housing costs are rising steeply, in step with the benchmark areas. Median prices have risen by 63.5% in the past decade. This is a notably higher rate of increase than the wider HMA (60.6%) and other comparison areas suggesting higher pressures of demand within the district.
- The new build premium in the district in 2020/21 was 11%, though this varies significantly by type with the greatest difference between new and old flats (+30% for new flats). This means that, on average, the price of new build homes is 11% than the price of housing in the existing stock. This has implications for the cost of affordable home ownership products as these are new build homes.
- Median average private rents in Lewes district were around £1,000 per month, and lower quartile rents were around £850 per month, both of which are higher than all of the comparison areas. Furthermore, the availability of cheaper private rents is likely to be limited, making access to affordable forms of housing more challenging for low income households.

## Affordability of Housing

- Rising prices make the affordability of market housing extremely challenging relative to local incomes in Lewes. While affordable routes to home ownership help to extend home ownership, significant discounts are needed to reach households on average incomes.
- Market housing to purchase is beyond the reach of average income households unless they benefit from savings or equity in an existing home.
- Affordable home ownership options such as shared ownership and First Homes make a meaningful difference to the affordability of housing. The market for these products is households earning around £30,000 - £68,100 (the income range of households who can afford market rents (1 bed property) but are unable to buy at lower quartile priced property).
- The highest possible First Homes discount and lowest possible shared ownership equity share would be needed to make new build flats affordable to households on average incomes. Discounts of 30-50% on new build homes would extend home ownership to more households but, with the exception of flats, is unlikely to reach those on average incomes.
- Savings for a deposit (whether 5%, 10%, or higher) make a big difference to affordability of affordable home ownership products and market ownership. The lack of sufficient deposit is a key barrier for most households who might access this housing.
- There are 53 households in Lewes district registered with the Help to Buy Agent with the vast majority currently living in the private rented sector. It is relevant to note that this is a small number compared to other LPAs where this data has been obtained. This may reflect more limited active demand, or could indicate that households are unaware of the register or reluctant to register for some other reason (eg low expectations of availability or affordability).
- Most (64%) are aged under 40. 60% are looking for a 2 bed property, 19% for a 3 bed and 21% for a 1 bed.
- 92% have incomes below £40,000 -ie they typically have below average household incomes. None of the households on the register have sufficient incomes for an entry-level market home.
- A newly built flat offered as a First Home with 30% discount or shared ownership at 50% equity would extend home ownership to just 8% of households on the register. Increasing the discount to 50% or decreasing the equity share to 25% would extend home ownership to 23% of households on the register. However, sufficient deposits remain a barrier to access.
- A newly built terraced offered as a First Home with 50% discount would extend home ownership to a small number of households on the Help to Buy register (around 15%)

of those currently unable to afford. However, discounts of 30-40% are unlikely to make much difference.

- Affordable/social rent serves a vital function for those with no alternative options in the market.

## **The Need for Affordable housing**

- The estimated annual need for affordable housing is 395 households in Lewes district as a whole (170 households need social/affordable rent and 225 need affordable home ownership).
- The LHNA estimates a net annual need for 170 new affordable/social rented homes over the plan period. These households are typically in acute housing need and are unable to meet their needs in the market.
- The size mix of affordable/social rented housing lettings is biased towards smaller properties with 48% of available properties 1-bed. Whilst the absolute scale of households on the waiting list is highest for those needing 1-bed homes, the pressure is greater on larger homes: there are 13 households waiting for every 3-bed property let; 4 waiting for every 2-bed, and 6 waiting for every 1-bed.
- The estimated annual potential demand for affordable home ownership is 225. These households are accommodated in the private rented sector but may prefer to own if they could. Some may also be able to access the lowest cost market options.
- If these households were able to access affordable ownership, this would release private rented properties for let to other households, resale on the market, or sale to registered providers for letting at affordable rents.
- The total affordable annual need of 395 is 51% of the standard method figure of 782 (Lewes district as a whole). If 111 PRS units are released when households needing affordable housing are able to access it each year the net need would be 284 or 36% of the standard method figure of 782.

## **Specialist Housing for Older People**

- There is robust evidence of need for specialist accommodation, primarily for market tenures and with a range of levels of care, as well as some care home accommodation. These components of need may overlap to some degree, could be reduced through suitable mainstream provision and will depend on future care commissioning approaches.
- Lewes district's current population, as per the 2021 Census, has a slightly older age profile than the wider Greater Brighton and Coastal West Sussex Market Area, and a more significant older bias compared to the population of the South East and England as a whole. Interestingly, the level of disability in Lewes' two older age groups aged 50 and over is lower than at the national level (47% compared to 52% nationally). This may indicate that whilst the population has a known older bias, a

larger proportion of these people are active and healthy in later life compared to England as a whole.

- The overall incidence of disability across the district can also be compared across the different sub-areas within Lewes. The population of the coastal sub area has the highest proportion with a Long Term Health Problem or Disability (Census terminology). This is likely to be due to its older age profile. The rates in the rural and Lewes town sub-areas are approximately equal, and both relatively low. The sub-area outside the SDNP has a significantly higher rate of disability than inside, reflecting the rates in the population of the coastal area.
- ‘POPPI’ data projects the number of older people requiring help with domestic tasks or self-care to increase by 44% from 2020 to 2040, with rates of long-term illness and dementia also projected to rise by 48% and 56% respectively.
- Of the 1,996 units of specialist accommodation in Lewes district currently, 52% are for leasehold market sale and 45% for affordable rent with the remainder private rented 2%. Only 20% of units offer onsite care. This supports an emphasis on market options and points to a greater unmet need for extra care units.
- The annual additional need for specialist housing for older people is estimated at 1,953-2,557 units (the range reflects the outputs of AECOM’s in house model and the Housing LIN SHOP toolkit). This estimate falls within the overall housing need figure as it relates to mainstream housing.
- Most of the need is likely to be for market specialist housing because of the high rate of ownership among the current 55-75 cohort.
- There is a strong case for adaptations to mainstream housing and development of new homes to improved accessibility standards - (M4(2)) in particular. There also appears to be an undersupply of extra care schemes which provide onsite care and support, with most of the current provision as sheltered housing.
- There are currently 537 residential care home beds and 409 nursing care beds in Lewes district.
- An estimated 23-43 units of care home accommodation are needed annually, with over half of the need for residential care over nursing care. This range is based on AECOM’s in house projection of the institutional population and the Housing LIN SHOP toolkit. This estimate is likely to fall outside of the housing need figure as it relates to accommodation which is not mainstream housing.

## **Housing for Vulnerable Groups**

- This LHNA considers the housing needs of some vulnerable groups, including people with disabilities, people with learning disabilities, people with mental health needs and young people leaving care.
- Lewes has a similar incidence of disability (measured by the indicator of long term health and physical disability which limits day to day activities) (18%) compared to

England as a whole, though slightly lower than East Sussex as a whole (20%). Rates of disability are higher in the coastal sub area (21%) with lower levels in Lewes town and the rural area (15% and 16% respectively).

- The projected increase in the population with a disability from 2020 to 2040 is 20%, driven almost exclusively by the older population.
- 'PANSI' data for Lewes gives an estimate of 1,932 adults with a learning disability in 2020, rising to 2,164 in 2040. These figures are higher than national prevalence rates applied to the local population.
- National prevalence rates suggest 728 people have a serious mental illness in 2020, rising to 793 in 2040. A further 8,418 people are likely to have depression within the district in 2020 rising to 9,180 in 2040.
- In 2018 there were 154 lettings of supported housing units within Lewes according to CORE. 69 (almost half) were to younger people aged 16-24, some of whom were care leavers.
- A range of vulnerable groups are served by East Sussex County Council (ESCC) through specialised housing provision and other forms of care in their own homes. The needs of these groups tend to vary greatly and have a less direct connection to specific forms of housing. As such, a flexible approach is required. Data in this area is limited and we are seeking additional inputs.
- The majority of those who receive care or support from ESCC are likely to be supported in their own homes or in supported living. Demand for specialist accommodation may rise to accommodate those moved out of residential care under Government and ESCC policy.
- The vast majority of people who receive care or support from ESCC will live independently and not require supported housing, although their numbers may rise in the short term due to funding changes, the cost of living crisis and any potential economic recession.
- The AECOM team's experience in researching the needs and aspirations of older and vulnerable people across a range of geographies suggests that there are some common ingredients that vulnerable people need and aspire to from their home. These are also common aspirations of all households. 2-bed self-contained flats or clusters could be useful for meeting a range of different needs, allowing for flexible use (e.g. to accommodate carers where required) and floating support to be provided efficiently.
- Discussions with LDC and ESCC officers also identified an urgent need for 'move on' accommodation for vulnerable people currently accommodated in hostels and temporary accommodation including homeless people and care leavers.
- Improved standard of accessibility and adaptability in new housing provision, including wheelchair accessible housing, would also benefit vulnerable people who may access this housing and allow them to live independently with appropriate



support and care in the home. Government has set out its intention to introduce M4(2) standards into building regulations as a requirement rather than an optional standard. The incidence of wheelchair use within the population of the district suggests the need for 5-23 wheelchair accessible homes each year based on the national rates of wheelchair use applied to Lewes district's housing need figure of 782. This range falls within the overall housing need figure since it relates to mainstream housing.

# 1. Objectives and Outline

- 1.1 Lewes District Council (LDC) are in the process of preparing a new Lewes Local Plan (LLP). This will be the key planning document that will shape, plan and manage growth, regeneration and development across the district, based on a 20-year vision for those parts of Lewes outside of the South Downs National Park (SDNP)<sup>4</sup>. The proposed Local Plan period starts in 2020 and extends to 2040.
- 1.2 As part of the evidence to underpin the new LLP, LDC have commissioned a Local Housing Needs Assessment (LHNA) from AECOM. The following section sets out the purpose and objectives of our study and outlines the structure of our report.
- 1.3 The purpose of this LHNA is to produce a robust assessment of housing need and demand for the Lewes Local Plan area to underpin the housing policies and requirements of the LLP, in line with up-to-date national policy and guidance on housing need.
- 1.4 The housing needs evidence supplied in this report will look forward to the Plan end date of 2040. Where possible it will also provide annualised figures over the 20-year period, which can be extrapolated to a different term if the Plan period changes.
- 1.5 The National Planning Policy Framework (NPPF) sets out a number of requirements for Local Plans in developing their evidence in relation to planning for new homes (see Box 1-1 below). These requirements were fully taken into account in preparing this LHNA.

## Box 1-1: NPPF 2021 requirements for LHNAs

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NPPF paragraphs 61-67 describe how the need for housing should be established through an LHNA, using the “Standard Method” as set out in national Planning Practice Guidance (PPG) unless exceptional circumstances justify an alternative approach.

In addition to this local need, once it is established, any needs that cannot be met within neighbouring areas should also be taken into account in the amount of housing to be planned for (paragraph 61). The NPPF continues as follows:

“62. Within this context, the size, type, and tenure of housing needed for different groups in the community should be assessed and reflected in planning policies (including, but not limited to, those who require affordable housing, families with children, older people, students, people with disabilities, service families, travellers, people who rent their homes and people wishing to commission or build their own homes)”.

Paragraph 63 specifies that for any affordable housing identified, planning policies should specify the type required, and expect this need to generally be met on-site.

“64. Provision of affordable housing should not be sought for residential developments that are not major developments, other than in designated rural areas (where policies may set out a lower threshold of 5 units or fewer). To support the re-use of brownfield land, where vacant buildings

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<sup>4</sup> As the SDNP is covered by a separate Local Plan ([South Downs Local Plan - South Downs National Park Authority](#)) and Housing Needs Assessment ([General Report Template \(southdowns.gov.uk\)](#))

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are being reused or redeveloped, any affordable housing contribution due should be reduced by a proportionate amount.

65. Provision of affordable housing should not be sought for residential developments that are not major developments, other than in designated rural areas (where policies may set out a lower threshold of 5 units or fewer). To support the re-use of brownfield land, where vacant buildings are being reused or redeveloped, any affordable housing contribution due should be reduced by a proportionate amount”.

Finally, the NPPF, in its paragraph 66, states that Local Planning Authorities (LPAs) should establish a housing requirement figure for their whole area, showing the extent to which their identified housing need and any unmet needs from neighbouring areas can be met over the Plan period.

*Source: NPPF 2021*

- 1.6 The District Council, through its emerging Local Plan, has signalled its intention to update the Plan’s approach to addressing local housing need in line with changes in national policy, as well as introducing new allocations, and strengthening the Plan in other areas such as climate change and design. For this purpose, LDC have published an Issues and Options report in July 2021<sup>5</sup>, which explores different options, their advantages and disadvantages on a number of subjects. These include housing for a growing population, taking into account the housing needs of young people and the elderly, and the need to provide a varied supply of housing to meet diverse needs of those who live in, or wish to live in the district. The Issues and Options consultation was carried out over an 8-week period from 9 July to 3 September 2021<sup>6</sup>.
- 1.7 Our study will provide an evidence base on the needs and demands for housing in Lewes. This reflects the wider housing market which relates to the district, and what this evidence implies for future development on larger sites and extensions to settlements, and for smaller sites and intensification. The report will be capable of being used as evidence for the emerging Local Plan and related strategies in the district.

## Conceptual Framework

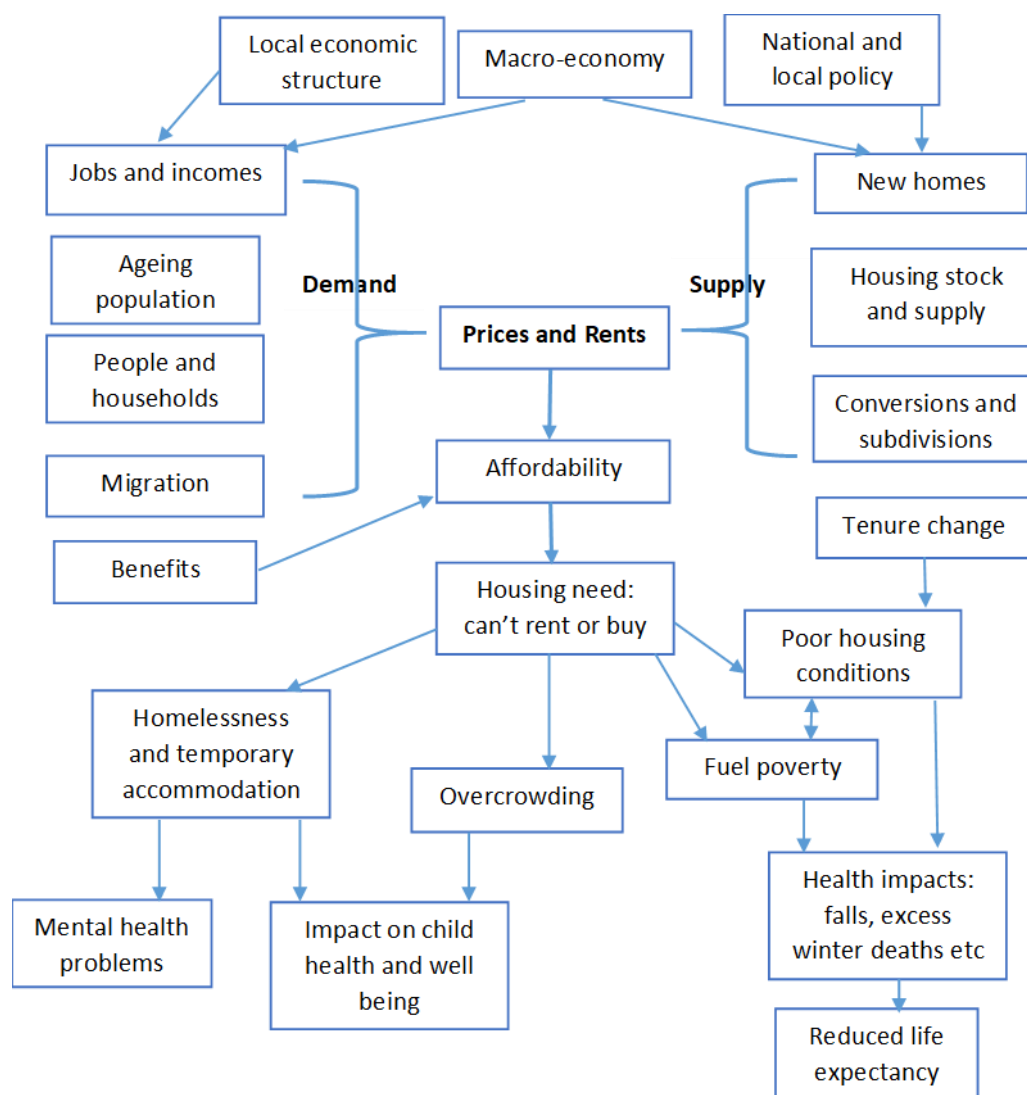
- 1.8 To consider the demand and need for housing within Lewes District as a whole and, specifically, the part of the district which sits outside the SDNP, it is useful to structure analysis and evidence in terms of the different components of the housing market and how they interact. Figure 1-1 below provides our conceptual framework for the housing market. It identifies the different drivers on the demand for and supply of housing. The interaction between demand and supply determines prices, rents, and affordability and ultimately housing market outcomes such as housing need, poor housing conditions and impacts on health and wellbeing.

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<sup>5</sup> [https://planningpolicyconsult.lewes-eastbourne.gov.uk/gf2.ti/-/1301314/107546021.1/PDF/-/Lewes\\_District\\_Local\\_Plan\\_-\\_Issues\\_and\\_Options\\_-\\_July\\_2021\\_-\\_08-07-21.pdf](https://planningpolicyconsult.lewes-eastbourne.gov.uk/gf2.ti/-/1301314/107546021.1/PDF/-/Lewes_District_Local_Plan_-_Issues_and_Options_-_July_2021_-_08-07-21.pdf)

<sup>6</sup> [Issues and Options Consultation Summary Report FINAL 2 .pdf \(lewes-eastbourne.gov.uk\)](#)

**Figure 1-1: Conceptual Framework for the Analysis of the Housing Market in Lewes**



Source: Kerry Parr, The Health & Housing Partnership LLP (now AECOM)

1.9 The conceptual framework above provides direction for the evidence in the rest of this report, to consider:

- **Demand:** key evidence on demographic change and household incomes;
- **Supply:** key evidence on tenure change and the nature of the housing stock;
- **Prices, rents, and affordability:** how the interaction between demand and supply determines prices and rents and how affordable these are to local residents;
- **Affordable housing need:** households who are unable to either rent or buy in the market on the basis of affordability; and
- **Specialist housing:** households who need care or support to live independently and improve their health and wellbeing.

## Report Structure

1.10 The remainder of this report is structured as follows, using the conceptual framework as a logical flow of the presentation of evidence, whilst meeting the specific requirements of NPPF policy:

- **Section 2: Geographical and Housing Market Context** reviews the geographical context for the district and housing market area to which it relates.
- **Section 3: Planning Policy Context** examines the relevant adopted and emerging national and local policy context on the subject of housing.
- **Section 4: Local Housing Need** sets out the scale of new housing required based on Lewes District Council's policy paper, which uses the government's Standard Method to estimate the need for housing; and considers how this should be apportioned to the part of the district outside the SDNP.
- **Section 5: Demand – People and Households** examines evidence on the range of different households in Lewes, demographic trends, as well as trends in earnings and incomes, which feed through into the need for different types and sizes of homes.
- **Section 6: Supply – Housing Stock and Supply** provides analysis of the existing mix of housing within Lewes and the nature of recent completions.
- **Section 7: Prices, Rents and Affordability** presents a range of data which reflects the interaction of demand and supply in Lewes. Specifically, the section focuses on the affordability of buying and renting and the extent to which local households can afford market housing and affordable tenures.
- **Section 8: The Need for Affordable Housing** assesses the scale of need for affordable housing to rent and affordable housing to buy. This section meets the requirements of NPPF and the PPG guidance in terms of estimating affordable housing needs.
- **Sections 9: Specialist Housing for Older People** considers the housing needs of older people and the extent to which mainstream housing can accommodate their needs or whether specialist housing is required to provide care and support. It also briefly examines the need for care home accommodation.
- **Section 10: Supported Housing for Vulnerable People** examines the scale of need from vulnerable groups and the extent to which supported housing is required to meet their needs.

## 2. Geographical and Housing Market Context

### Introduction

2.1 This section considers the geographical context of Lewes district, the extent to which there is a wider housing market area relating to the district, the complexities of the South Downs National Park boundary, and how this impacts on data analysis contained in this LHNA. The section also outlines the sources of data and other evidence this LHNA references and analyses.

### Geographical context

2.2 Lewes is a coastal district located in the South East of England, in East Sussex. The district is named after the market town of Lewes and is located just northeast of Brighton and northwest of Eastbourne. It includes 21 wards and 24 parishes. In addition to the market town of Lewes, other towns in the district include Newhaven, which is a port with an international ferry; the coastal towns of Peacehaven and Seaford; and Telscombe, consisting of the three settlements of Telscombe village, Telscombe Cliffs, and Saltdean. Neighbouring local authority areas are the City of Brighton and Hove, Mid Sussex and the Wealden district.

2.3 Lewes district's visitor economy is one of its strongest performing economic sectors, with tourism attracted by the coastal location and SDNP. In addition to tourism, the port of Newhaven, the rural economy including agriculture, and retail activity are other significant contributors to the district's economic base.

2.4 Transport is currently dominated by private car use, with aspirations for a modal shift through the new Local Plan. Key roads include the A27 linking to Eastbourne to the east and Brighton to the west, and the A23 and A26 running north-south between Newhaven and the M20, and between Brighton and the M25, respectively. The A22 links the town with London to its north, and the A259 links to Eastbourne, Bexhill, and Hastings to the east. Public transport can be accessed from railway stations at Plumpton, Lewes, Glynde, Newhaven, Newhaven Harbour, Seaford, and Southease, providing services to destinations including Brighton and London. The Local Plan area is also served by bus services across the district and to the surrounding area, including to Brighton.

2.5 The SNDP, which is a significant environmental and economic asset to the area, occupies just over half of the district, severing the coastal towns and settlements from the remainder of the Lewes Local Plan area. The Local Plan therefore covers two separate and quite distinct areas: the coastal towns south of the SDNP, and the countryside and villages of the Low Weald north of the national park. Significant housing growth has taken place recently, particularly in the coastal part of the district.

2.6 The South Downs National Park Authority (SDNPA) is the local planning authority for the whole of the South Downs, the entirety of which is covered by the South Downs Local



Plan (SDLP) 2014-2033. Therefore, Lewes District Council’s new Local Plan will only apply to the area of the district that is outside of the National Park. The SDNPA became the LPA for the National Park area in 2011, and therefore, Census data needs to be disaggregated between the two Local Plan areas. A map of the Lewes District Local Plan area appears in Figure 2-1.

**Figure 2-1: Lewes District showing the Local Plan area**



Source: Lewes Issues and Options Paper 2021 <sup>7</sup>

<sup>7</sup> [Lewes District Local Plan - Issues and Options - July 2021 - 08-07-21.pdf \(lewes-eastbourne.gov.uk\)](https://www.lewes-eastbourne.gov.uk/lewes-district-local-plan-issues-and-options-july-2021-08-07-21.pdf)

## Relevant Data

- 2.7 This LHNA assesses a range of evidence to ensure its findings are robust for the purposes of developing LLP policy and are specific to Lewes' local authority area.
- 2.8 This includes data from the Census (2011 and 2021 where available) and a range of other data sources, including:
- Other Office of National Statistics (ONS) datasets providing more up-to-date demographic information;
  - 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;
  - Intelligence from local estate agents;
  - Income data from CACI;
  - Local Authority Housing Waiting List data, as well as data on completions, homelessness, housing benefit, the Self-Build register, and Help to Buy;
  - County data on supported housing; and
  - Information from the previous Strategic Housing Market Assessment (SHMA) published in 2008 (although we note that this is now over ten years old and therefore referenced to a limited extent).
- 2.9 More recent data sources for the population and existing housing stock will be used wherever possible in this report. However, 2011 Census datasets providing, for example, the breakdown of households (as opposed to individuals) by age and the tenure of dwellings by age, cannot be accurately brought up to date. Such patterns are instead generally assumed to persist to the present day, and this cannot be verified accurately until all Census 2021 data is published.

## Reviewing the Housing Market Area

- 2.10 This LHNA has undertaken a review of the housing market area that relates to Lewes district. It is important to state that this exercise is not a full scale re-definition of the housing market area but a review of existing definitions, cross checked with the latest available data. Data on household migration and travel to work from the Census 2021 has not yet been released. This may allow a more thorough review of geographies. This data is expected in 2024 which may merit a review of the market area. However, the Census 2021 survey was undertaken during a national lockdown which is likely to have affected both household moves and travel to work. Census 2021 may not, therefore, be representative in the longer term changes to migration and travel to work which would impact on the definition of housing markets. This LHNA has:



- Examined existing HMA definitions – DTZ and NHPAU and the SDNP HEDNA 2017
- Reviewed additional data including ONS migration matrices 2020 and Census 2011 travel to work.

2.11 In terms of the sub-district areas, these relate to character areas rather than migration or travel to work movements. The starting point was the broad definition in the previous SHMA which was matched to existing OAs and cross checked with LDC officers. See Appendix C for a definition of the areas for data collation purposes.

## Existing Housing Market Area Definitions

2.12 Whilst this LHNA focuses on the Lewes Local Plan area, it is important to keep in mind that most districts are not self-contained housing market areas. Housing market areas (HMAs) are usually wider than local authority areas and often stretch across a number of districts or boroughs. This is because HMAs are inherently linked to the labour market, employment patterns, and travel to work areas.

2.13 In the case of Lewes District, the previous SHMA<sup>8</sup> (undertaken in 2008 to support the Core Strategy) establishes a ‘wider coastal area’, a market area centred on Brighton and Hove, also including the whole of Adur, coastal Lewes and Lewes town, across which there is a significant inter-relationship in terms of housing and other factors. This is also consistent with the approach in the Brighton and Hove Strategic Housing Market Assessment (SHMA 2008)<sup>9</sup>.

2.14 Former MHCLG (now DLUHC) guidance on HMA dates from 2010<sup>10</sup>. It states that “in order to assess the suitability of the recommended housing market area geographies to inform strategic planning issues in relation to housing delivery, there is an analysis of the relationship between the housing market areas and existing policy areas:

- *travel-to-work areas;*
- *strategic housing market assessments;*
- *National Parks and Green Belt; and*
- *Growth Areas and Growth Points”.*

2.15 It concludes that a tiered approach to housing market areas is theoretically sound and may be the most appropriate approach, “*characterised as:*

- *Tier 1: framework housing market areas defined by long distance commuting flows and the long term spatial framework with which housing markets operate. (under this definition Lewes District sits within the framework area centred on Brighton)*
- *Tier 2: local housing market areas defined by migration patterns that determine the limits of short term spatial house price arbitrage.*

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<sup>8</sup> [Strategic Housing Market Assessment, Parts 1 and 2 \(lewes-eastbourne.gov.uk\)](https://www.lewes-eastbourne.gov.uk)

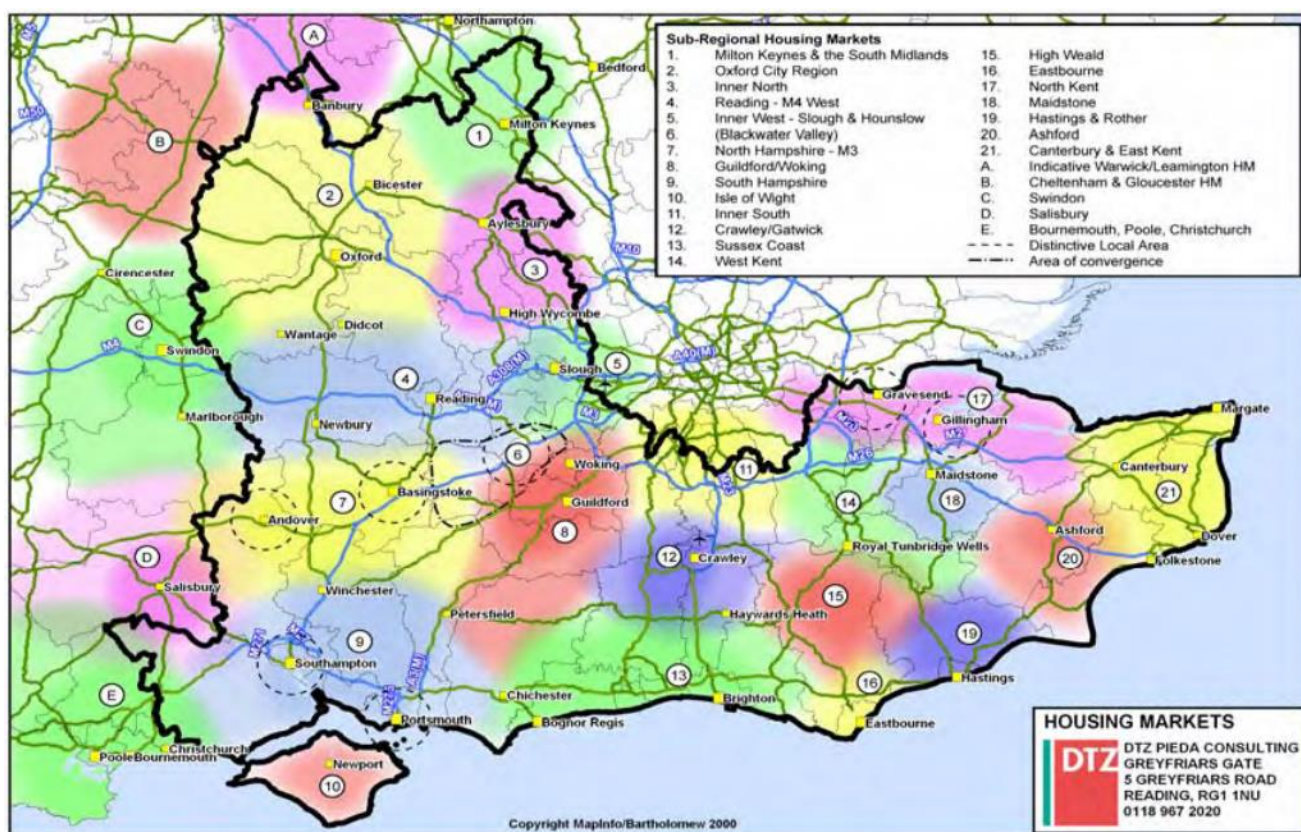
<sup>9</sup> [Final Report April 2008 - origi.PDF \(brighton-hove.gov.uk\)](#)

<sup>10</sup> CLG, Geography of Housing market areas, November 2010, [Housing market areas - GOV.UK \(www.gov.uk\)](https://www.gov.uk)

- Tier 3: Submarkets defined in terms of neighbourhood or house type price premiums”.

2.16 DTZ undertook mapping of housing market areas in the South East region of England which places Lewes in the housing market area of the Sussex Coast (see area number 13 in the figure below). However, this was based on 2001 Census migration and travel to work data which was the latest available at the time.

**Figure 2-2: Spatial Delineation of the South East’s Sub-Regional Housing Markets**

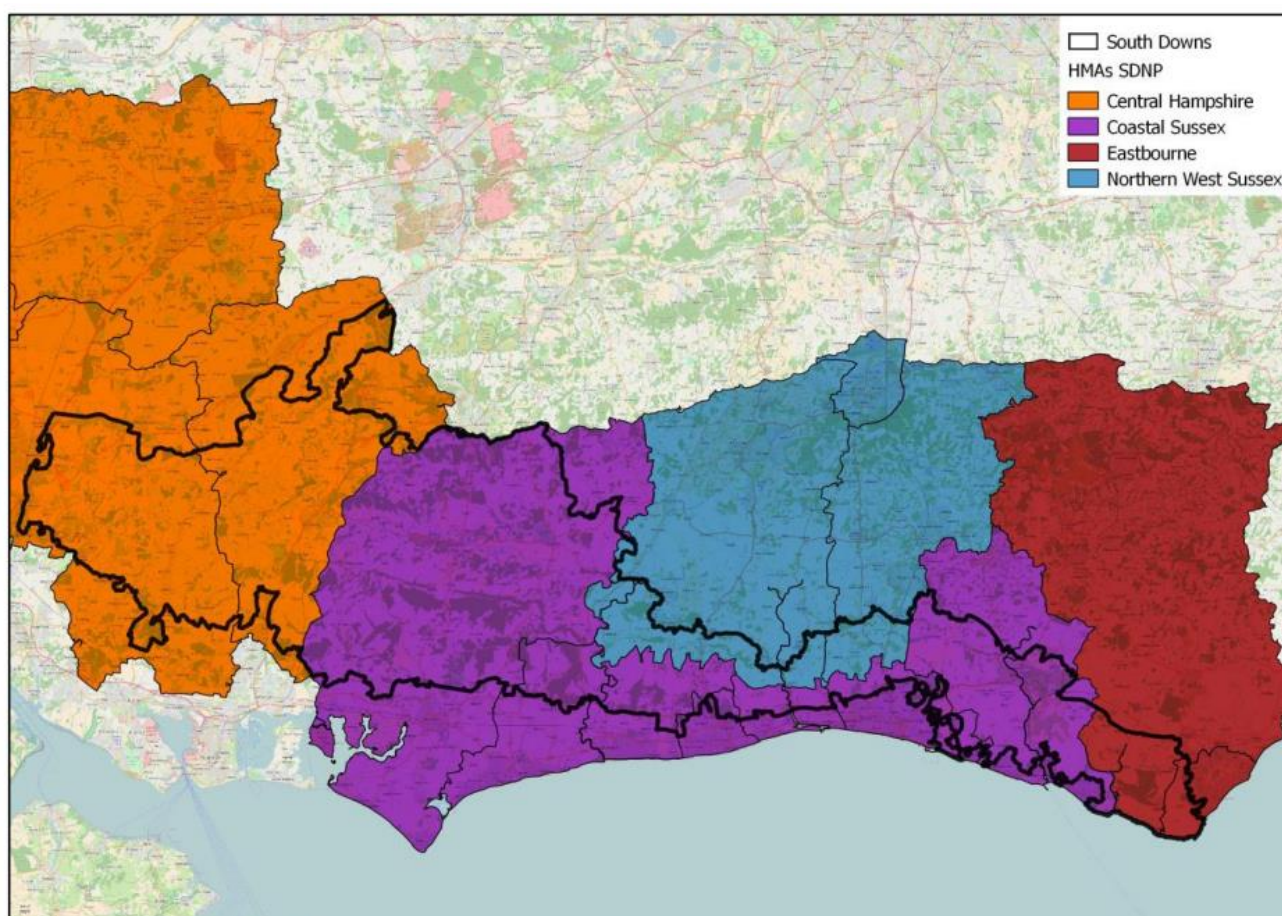


Source: Figure 2.1, Lewes Housing Market Assessment 2008

2.17 The 2017 South Downs National Park Housing and Economic Development Needs Assessment (HEDNA)<sup>11</sup>, drew on more recent data on household migration and travel to work patterns (Census 2011). This study concluded that Lewes District as a whole sits within the wider Coastal Sussex housing market area (see map below). However, given where the district sits in this geography, there are strong connections and overlaps with both the Eastbourne housing market area to the east and Northern West Sussex market area to the north.

<sup>11</sup> [General Report Template \(southdowns.gov.uk\)](https://www.southdowns.gov.uk)



**Figure 2-4: Map of housing market areas defined in SDNP HEDNA 2017**

Source: GL Hearn, 2015

Source: SDNP HEDNA 2017 (drawing on definition of housing market areas from 2015)

### Additional Data Review

2.18 AECOM has examined the most up to date data available on residential movements of people into and out of Lewes to cross check this housing market area definition. This data is drawn from the ONS internal migration matrices for the year ending 2020 (the latest available data). These are estimates produced annually by the ONS, based on a range of data sources but in particular GPs registrations. Figure 2-5 shows the main moves into Lewes district and Figure 2-6 shows the main moves out of Lewes district. These are the top 12 authority areas which account for most movements (between 66% of moves in and 72% of moves out of Lewes district).

2.19 The largest proportion of people moving into the district are from Brighton and Hove (30%). Collectively, moves from London as a whole account for 13% of people moving in. Neighbouring authorities of Mid Sussex and Eastbourne and Wealden also account for significant numbers of people moving in which confirms significant links between Lewes district and neighbouring housing market areas, particularly Eastbourne and Wealden and North Wessex (or Gatwick/Crawley). The same authority areas account for the largest number of people moving out of Lewes district indicating that there are reciprocal flows.

2.20 However, Figure 2-7 shows net movements of people to and from Lewes district. There are net positive moves of people from Brighton, London and Mid Sussex into Lewes district. This is likely to reflect, to some extent, households moving from higher priced areas seeking more affordable housing (relative to their current location). Conversely, there are net moves of people out of Lewes district into Eastbourne and Wealden.

**Figure 2-5: People movements into Lewes District, 2020**

LA moving from	Number	%
Brighton and Hove	1,732	30%
London (all)	746	13%
Mid Sussex	528	9%
Wealden	431	8%
Eastbourne	237	4%
Rother	83	1%
Adur	79	1%
Hastings	63	1%
Worthing	56	1%
Crawley	55	1%
Arun	50	1%
Horsham	48	1%
All other LAs	1,591	28%
<b>Total</b>	<b>5,699</b>	<b>100%</b>

Source: ONS Internal migration matrices, year ending June 2020

**Figure 2-6: People movements out of Lewes District, 2020**

LA moving to	Number	%
Brighton and Hove	971	19%
Wealden	631	13%
Eastbourne	441	9%
Mid Sussex	390	8%
London (all)	348	7%
Worthing	98	2%
Horsham	91	2%
Scotland	72	1%
Rother	71	1%
Adur	71	1%
Hastings	62	1%
Crawley	44	1%
All other LAs	1,693	34%
<b>Total</b>	<b>4,983</b>	<b>100%</b>

Source: ONS Internal migration matrices, year ending June 2020

**Figure 2-6: Net people movements for Lewes District, 2020**

<b>Net moves (people)</b>	<b>Number</b>
Brighton and Hove	761
London (all)	398
Mid Sussex	138
Wealden	-200
Eastbourne	-204
Rother	12
Adur	8
Hastings	1
Worthing	-42
Crawley	11
Arun	8
Horsham	-43

*Source: ONS Internal migration matrices, year ending June 2020*

2.21 The AECOM team also reviewed the Census 2011 travel to work data. Given that this data was used in the definition of the market areas in the SDNP HEDNA 2017 (and 2015) studies, it does not merit repeating. However, in summary, as with migration patterns, Lewes district's closest relationship is with Brighton and Hove. A substantial proportion of Lewes's residents in work commute to Brighton (24.3% in 2011). This movement far outweighs travel to other districts (Mid Sussex 6%, Wealden, 5% and London 4%). Conversely, 14.9% of Lewes's workforce commute in from Brighton and Hove, with a further 10.6% from Wealden and 6.3% from Eastbourne.

2.22 Based on the previous housing market area definitions (DTZ in 2008, the SDNP HEDNA in 2017) and AECOM's review of more recent migration estimates, we maintain that Lewes Local Plan area and Lewes district as a whole sits within a Greater Brighton housing market area. The strongest relationship in terms of household migration continues to be with Brighton. However, Lewes district also has migration links to other neighbouring areas, including Eastbourne and Wealden and the North Wessex (also termed Gatwick/Crawley) housing market area to the north. There is also a significant net flow of people from London to Lewes each year which is likely to be driven by households seeking more affordable locations and lifestyle change, though with many retaining connections to the employment market in London.

## Study Geographies

2.23 In addition to examining Lewes district and the wider Housing Market Area, Lewes District Council also requested data to be presented for the Coastal West Sussex and Greater Brighton Strategic Planning Board area, which is the wider planning area within which Lewes and its housing market area sits. It is relevant to note that there is more than one housing market area within the strategic planning board area.

2.24 Where possible and appropriate we also include some sub district data, of the coastal area, the rural area, and Lewes town. These are broadly consistent with the sub-areas used within the previous SHMA (2008). These are not housing market areas but rather areas which share similar characteristics or have a logic in terms of their sub-area geography. As such, the definitions are pragmatic with output areas used to define the Lewes town urban area and the coastal area. The area of Lewes district inside the SDNP (and conversely outside) was based on an Output Area best fit of the SDNPA. These geographies are defined in Appendix C.

2.25 In summary, Lewes functions within a wider strategic area, but also contains distinct sub-areas. As well as fostering good working relationships with neighbouring local planning authorities (LPAs), it is therefore useful to think about the role of Lewes internally, as well as within the wider market and planning board area, as part of the new Local Plan. This LHNA can provide evidence to understand this role and the specific features of the sub-areas within a wider context.

2.26 The relevant geographies for which our report examines data (shown in Figures 2-4 and 2-5) therefore include:

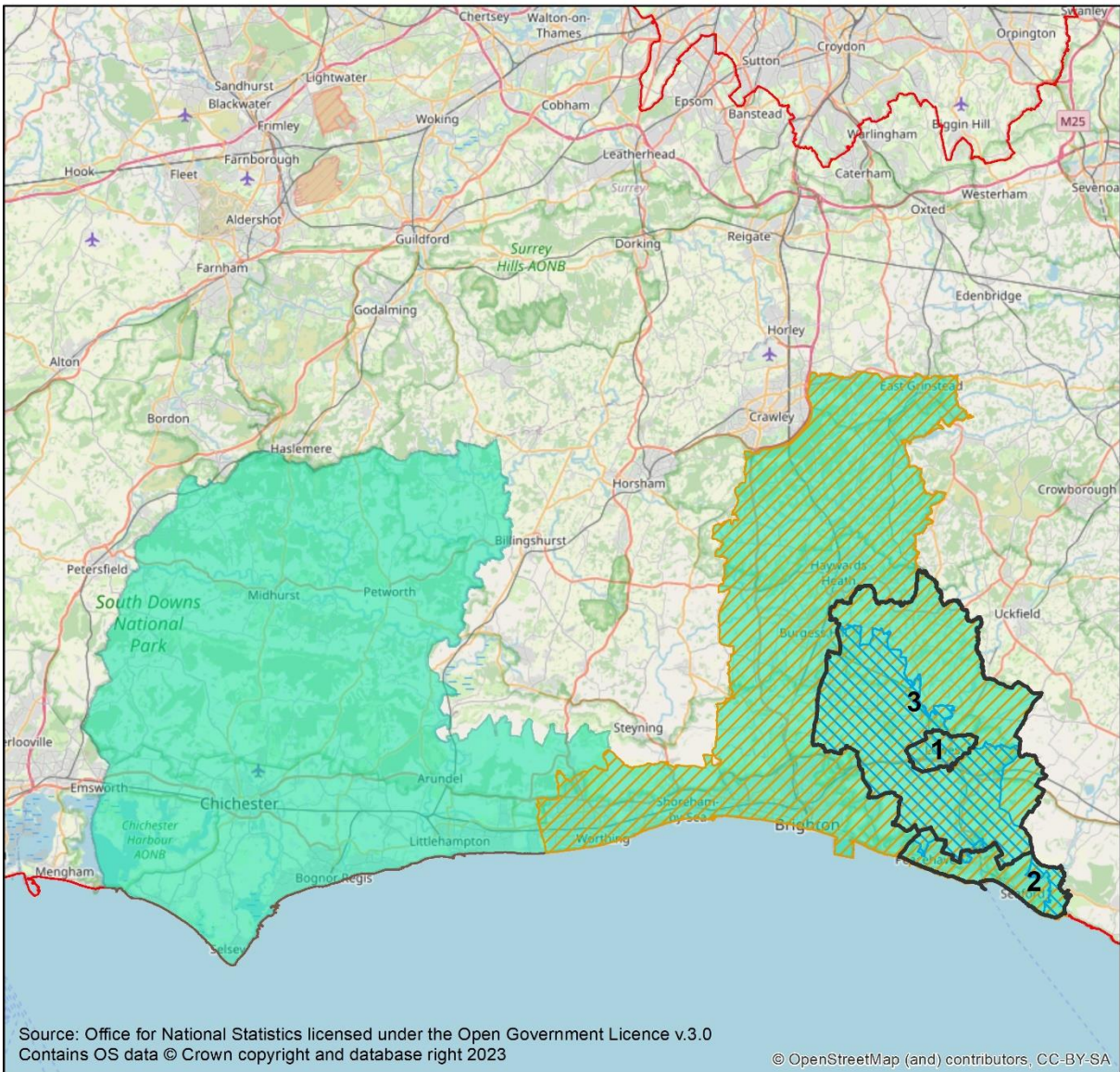
- Lewes District;
- Lewes District sub-area – the ‘coastal area’;
- Lewes District sub-area – the ‘rural area’; and
- Lewes District sub-area – Lewes town.
- Lewes District within the South Downs National Park (SDNP);
- Lewes District outside the SDNP;
- Greater Brighton HMA;
- Greater Brighton & West Sussex Strategic Planning Board Area (SPBA)<sup>12</sup>;
- The wider South East;
- England.

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<sup>12</sup> This report excludes Horsham and Crawley local authority area from this data

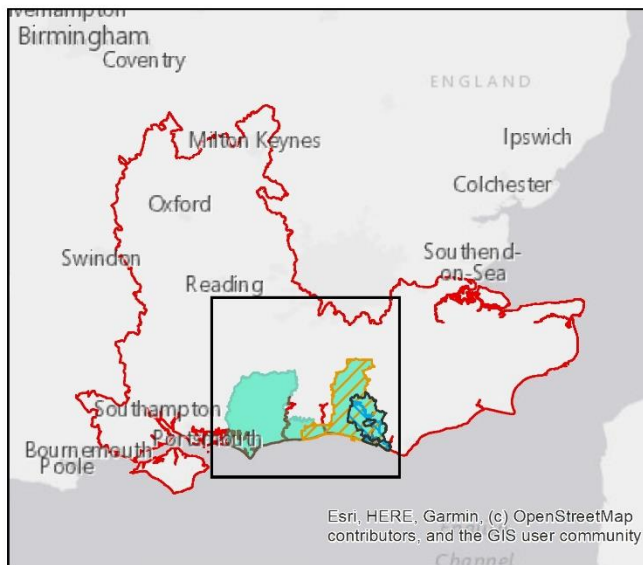
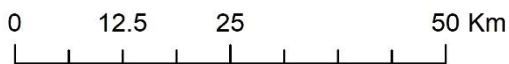


**Figure 2-3: Map of Lewes, sub-areas, and comparator geographies**



**Key**

-  1 Town Sub Area
-  2 Coastal Sub Area
-  3 Rural Sub Area
-  SDNP within Lewes
-  Greater Brighton HMA
-  Greater Brighton & Coastal West Sussex SPBA
-  South East



Source: AECOM

## 3. Planning Policy Context

### Introduction

- 3.1 This section examines the relevant national policy and guidance framework present at the time of writing, as well as the adopted and emerging local planning policy context and related evidence on the subject of housing in Lewes district.

### National policy & guidance

- 3.2 Delivering more housing remains a key goal for Government. Government restated its aim to deliver 300,000 homes a year in its Levelling Up and Regeneration Bill: reforms to national planning policy consultation - released at the end of December 2022. The Government stated in this consultation document that it would respond to the consultation by Spring 2023 so that policy changes can take effect as soon as possible after. The changes which are relevant to the preparation of the LHNA evidence base are discussed below.
- 3.3 Section 5 of the National Planning Policy Framework (NPPF) 2021 deals with the topic of delivering a sufficient supply of homes. NPPF paragraphs 61-67 describe how the need for housing should be established through an LHNA, using the “Standard Method” as set out in national Planning Practice Guidance (PPG). The December consultation document, including the proposed changes to the NPPF aim to clarify how housing figures should be derived and applied. On a specific point, the consultation also commits to reviewing the implications on the standard method of new household projections data based on the 2021 Census, which is due to be published in 2024. This is in response to challenges over the continued use of 2014-based household projections.
- 3.4 It is important to state that local authorities will still be expected to assess local housing need through the standard method to inform the preparation of their plans with the ability to use an alternative approach where there are exceptional circumstances that can be justified retained. However, the proposed changes to the NPPF will make clearer that the outcome of the standard method is an advisory starting-point to inform plan-making – a guide that is not mandatory. The consultation also commits to giving more explicit indications in planning guidance of the types of local characteristics which may justify the use of an alternative method. The government does not propose changes to the standard method formula or the data inputs to it through its consultation but will review the household projections in the light of Census 2021 data.
- 3.5 For Lewes district, this means that the consultation and proposed changes to NPPF text will not alter the housing need figure which emerges from the standard method. However, the consultation and proposed NPPF make clear that this figure is a starting point and not a housing requirement. Whilst this was true before these proposed changes, the consultation and new NPPF wording may shift the balance at Local Plan examination.
- 3.6 The proposed NPPF text (which changes highlighted in bold) is expressed as follows. Footnote references removed:



- 3.7 '60. To support the Government's objective of significantly boosting the supply of homes, it is important that a sufficient amount and variety of land can come forward where it is needed, that the needs of groups with specific housing requirements are addressed and that land with permission is developed without unnecessary delay. **The overall aim should be to meet as much housing need as possible with an appropriate mix of housing types to meet the needs of communities.'**
- 3.8 '61. To determine the minimum number of homes needed, strategic policies should be informed by a local housing need assessment, conducted using the standard method in national planning guidance. **The outcome of the standard method is an advisory starting-point for establishing a housing requirement for the area (see paragraph 67 below). There may be – exceptional circumstances relating to the particular characteristics of an authority which justify an alternative approach to assessing housing need; in which case the alternative used should also reflect current and future demographic trends and market signals.** In addition to the local housing need figure, any needs that cannot be met within neighbouring areas should also be taken into account in establishing the amount of housing to be planned for.'
- 3.9 '62. The Standard Method incorporates an uplift for those urban local authorities in the top 20 most populated cities and urban centres. This uplift should be accommodated within those cities and urban centres themselves unless it would conflict with the policies in this Framework and legal obligations.'
- 3.10 '63. Within this context **of establishing need**, the size, type and tenure of housing needed for different groups in the community should be assessed and reflected in planning policies (including, but not limited to: those who require affordable housing; families with children; older people **including for retirement housing, housing-with-care and care homes**; students; people with disabilities; service families; travellers; people who rent their homes and people wishing to commission or build their own homes)'.
- 3.11 Paragraphs 64-66 (new numbering) which deal with affordable housing remain unchanged. Furthermore, Government has restated its commitment to secure 10% affordable home ownership homes in the consultation document. However, the consultation document also emphasises the importance of securing Social Rented homes, as the most affordable homes. Whilst no changes to the NPPF text are proposed as yet, this may feature in the revised text following consultation.
- 3.12 Finally, the NPPF, current paragraph 66 (new paragraph) 67, states that LPAs should establish a housing requirement figure for their whole area, showing the extent to which their identified housing need and any unmet needs from neighbouring areas can be met over the Plan period. Additional text is proposed in this paragraph as follows: '[T]he requirement may be higher than the identified housing need, if it includes provision for neighbouring areas, or reflects growth ambitions linked to economic development or infrastructure investment.'

3.13 National policy in the NPPF on determining housing need is supported by relevant PPG on Housing and Economic Needs Assessment<sup>13</sup> (at the time of writing this LHNA last update in December 2020) and Housing and Economic Land Availability Assessment Guidance<sup>14</sup> (at the time of writing last updated in 2019).

3.14 PPG sets out the Standard Method for assessing local housing need, referred to in the NPPF. This Standard Method uses a formula to identify the minimum number of homes expected to be planned for, in a way which addresses projected household growth and historic under-supply; and identifies a minimum annual housing need figure, rather than a housing requirement figure (more on this, and on the detailed workings of the Standard Method, in section 4).

## Local Policy Context

3.15 Once adopted, the new Lewes Local Plan to 2040, for which our LHNA will provide supporting evidence, is intended to replace the current statutory development plan for those parts of Lewes outside the SDNP. This currently includes the following:

- Saved policies from the Lewes Local Plan (adopted in 2003), although none of them are directly relevant to our study<sup>15</sup>;
- The Lewes Core Strategy: Local Plan Part 1 (adopted in 2016)<sup>16</sup> – This is a Joint Core Strategy with SDNPA with a plan period of 2010 - 2030; and
- Lewes Local Plan Part 2: Site allocations and development management policies (adopted in 2020)<sup>17</sup>.

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<sup>13</sup> <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>

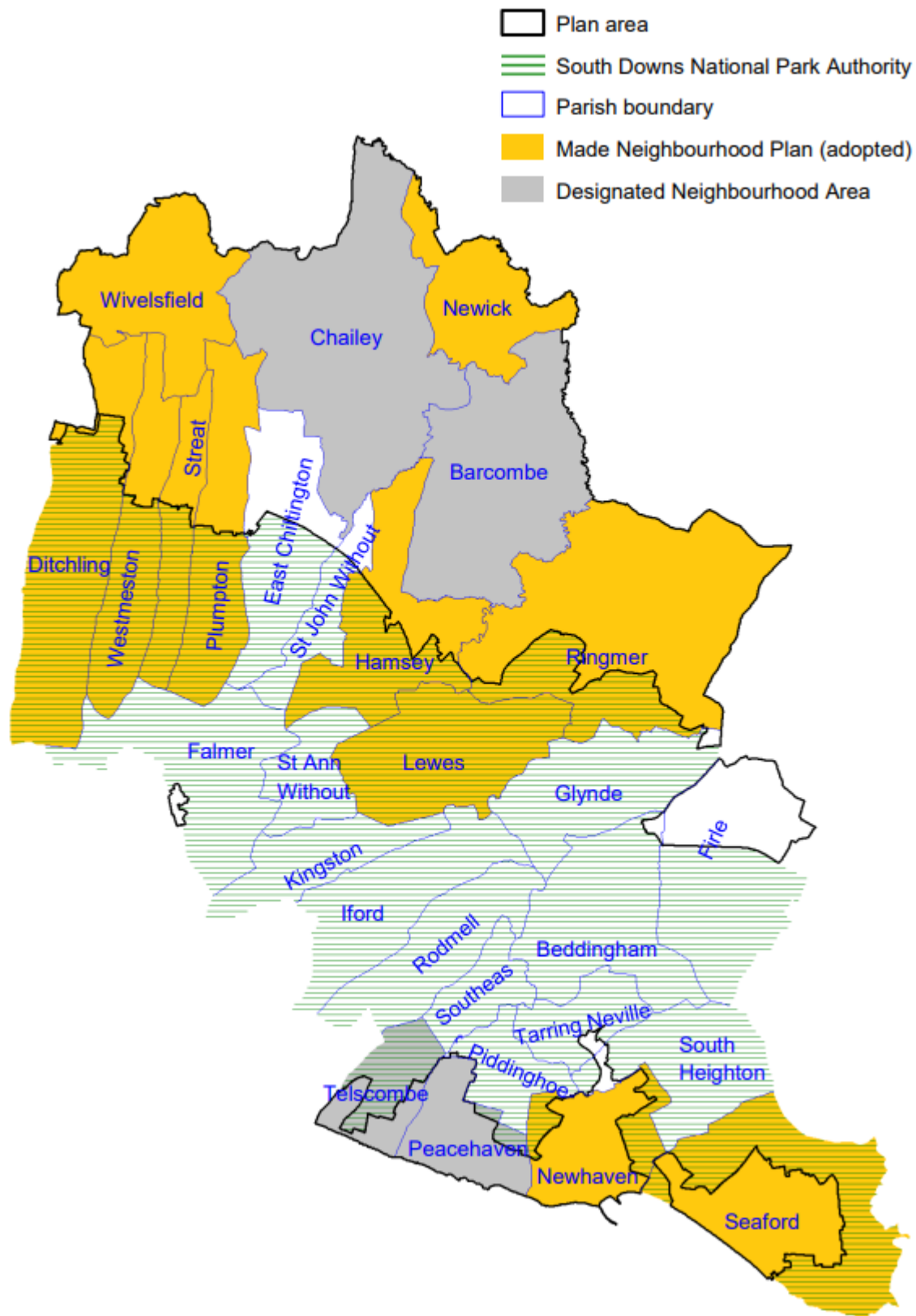
<sup>14</sup> [Housing and economic needs assessment - GOV.UK \(www.gov.uk\)](https://www.gov.uk/guidance/housing-and-economic-needs-assessment)

<sup>15</sup> [Lewes Local Plan 2003 saved policies - Lewes and Eastbourne Councils \(lewes-eastbourne.gov.uk\)](https://www.lewes-eastbourne.gov.uk/policies); Policies PT6, PT9, PT10, PT11, PT12, PT13, PT18, PT19 and PT20 still remain part of the development plan for the district

<sup>16</sup> [Lewes Core Strategy: Local Plan Part 1 - Lewes and Eastbourne Councils \(lewes-eastbourne.gov.uk\)](https://www.lewes-eastbourne.gov.uk/core-strategy)

<sup>17</sup> [Lewes Local Plan Part 2: Site allocations and development management policies - Lewes and Eastbourne Councils \(lewes-eastbourne.gov.uk\)](https://www.lewes-eastbourne.gov.uk/development-management)

**Figure 3-1: Local Plan Part 2 Plan Area**



Source: Lewes Local Plan Part 2: Site allocations and development management policies (2020)

3.16 The **South Downs Local Plan 2014-2033** (SDLP, adopted in 2019) covers those parts of Lewes in the SDNP<sup>18</sup>. Its relevant policies, although they do not apply to the Lewes Local Plan area, are still appropriate to be aware of, and key points are summarised below:

- The South Downs National Park Housing and Economic Development Needs Assessment (HEDNA 2017) has set out a housing need of 447 new dwellings per year;
- However, the South Downs Local Plan Sustainability Appraisal (SA 2014, 2015 and 2017) confirmed that the SDNPA would not be meeting its statutory purpose if it were to seek to fully meet the OAN within the National Park boundaries;
- Having regard to the landscape and five broad areas and river corridors, the spatial strategy for the South Downs Local Plan is for a medium level of growth (meaning the number of homes will reflect the historic delivery rate in the area now covered by the SDNP for the period 2004 – 2014) dispersed across the towns and villages of the National Park;
- SDLP figure 3.5 sets out Local Plan housing provision compared with the OAN range as advised in the HEDNA:
  - Annualised OAN in the National Park: 447 (over whole Plan period: 8,493)
  - South Downs Local Plan housing provision: 250 (over the whole Plan period: 4,750)
  - Annual shortfall in the National Park: 197 (over the whole Plan period: 3,743).
- The SDNP tested all known possible housing sites for development potential through a SHLAA and made provision for housing within the limited landscape capacity, as well as working with partner authorities to fully test all reasonable options for meeting unmet housing need in suitable locations outside the National Park boundaries;
- The SDNP designates two strategic sites, one of which is North Street Quarter and adjacent East gate area in Lewes (Strategic Site Policy SD57, providing approximately 415 residential units and other non-residential uses);
- There are also three strategic housing allocations, one of which is Land at Old Malling Farm in Lewes (Allocation Policy SD76 for development of 220 - 240 residential dwellings), which is a greenfield site that will make a significant contribution to meeting the unmet housing need of Lewes and was originally allocated in the Lewes Joint Core Strategy.

3.17 The **statutory development plan for Lewes District** (which does not include the SDLP) will, apart from the new Lewes Local Plan once this is adopted, also include any 'made' Neighbourhood Plans within the Local Plan area<sup>19</sup>. Lewes currently has 11 designated Neighbourhood Plan (NP) areas at the time of writing this LHNA:

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<sup>18</sup> [South Downs Local Plan and Policies Map 2014-2033 - South Downs National Park Authority](#)

<sup>19</sup> [Neighbourhood planning - Lewes and Eastbourne Councils \(lewes-eastbourne.gov.uk\)](#)

- Barcombe Parish (no NP made yet; draft published in 2018),
- Ditchling, Streat and Westmeston Parishes (NP made in 2018),
- Newhaven Town (NP made in 2019),
- Peacehaven and Tescombe Towns (no NP made yet; a pre-submission draft was published in 2022),
- Ringmer Parish (NP made in 2016),
- Wivesfield Parish (NP made in 2016 and reviewed in 2021),
- Chailey Parish (NP made in 2021),
- Hamsey Parish (NP made in 2016),
- Newick Parish (NP made in 2015),
- Plumpton Parish (NP made in 2018), and
- Seaford Town (NP made in 2020).

## **Policies in the adopted development Plan**

3.18 The table in Appendix B summarises adopted development Plan policies that are relevant to housing need and delivery in Lewes.

3.19 Importantly, particularly when considering housing numbers and allocations, the SDNPA only became the LPA for the National Park area in 2011. The Core Strategy 2010-2030, adopted in 2016, is therefore a joint Core Strategy (Local Plan Part 1) for Lewes and the SDNP, and thus housing numbers and allocations were combined for the two areas.

## **The emerging Local Plan**

3.20 The new Local Plan to 2040 is currently at Issues and Options stage. The Lewes District Local Plan Issues & Options Consultation document was published for a Regulation 18 consultation from July 2021<sup>20</sup>.

3.21 The new Local Plan is being developed because a review of the current two Local Plan documents parts 1 and 2 concluded that several strategic policies need updating. This is as a result of national policy changes and due to a considerable increase in the district's local housing need in line with the government's Standard Method. There is also an aspiration to strengthen other policies, such as on design and climate change. Finally, as the SDLP now provides planning policy for the SDNP, the new Lewes Local Plan to 2040 will have a different geographical remit, excluding the SDNP.

3.22 The Lewes District Local Plan Issues and Options document does not yet include draft policies. Instead, it asks consultees a number of themed questions to ascertain more detailed views on local issues, and the options available to tackle these.

3.23 The section on "Accommodating and Delivering Growth" sets out:

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<sup>20</sup> [Lewes District Local Plan - Issues and Options - Lewes and Eastbourne Planning Policy Consultations \(lewes-eastbourne.gov.uk\)](https://www.lewes-eastbourne.gov.uk/lewes-district-local-plan-issues-and-options)

- A new housing need figure for Lewes District (i.e. the entire district including the SDNP) produced by the government’s Standard Methodology of 782 new homes per year, or 15,640 up to 2040;
- A comparison with the requirement in the existing joint Local Plan (345 new homes per year);
- A question over what this means in terms of local housing need within the new Lewes Local Plan area (i.e. the area of the district outside of the SDNP, as the SDNP is not subject to the same requirements to seek to meet housing targets);
- The results of a calculation based on the government’s **Standard Methodology**, which estimate that the **‘housing need’ figure within the new plan area is 602 new homes per year, or 12,040 new homes over the plan period to 2040**; and
- A comparison with the current rate of housebuilding in the plan area (242 homes over the last year).

3.24 This LHNA will be part of the evidence work undertaken by LDC, to ascertain whether or not this figure is appropriate, and to add further detail on Lewes District’s housing need.

3.25 Table 2-2 below summarises emerging Local Plan Options relevant to housing need and delivery in Lewes.

**Table 2-2: Summary of relevant emerging Options in the Local Plan Issues and Options report (July 2021)**

**Emerging Provisions  
Housing  
Options**

1	Intensification of development within the coastal towns (to the south of the South Downs National Park and includes Seaford, Newhaven, Peacehaven and Telscombe Cliffs)
2	Further outward expansion of Newhaven and Peacehaven
3	Urban extensions to Burgess Hill and Haywards Heath
4	Focussing growth on the most sustainable villages in the Low Weald (the area located to the north of the South Downs National Park and includes the villages of Barcombe, Barcombe Cross, Broyle Side, Chailey, Cooksbridge, Newick, North Chailey, Plumpton Green, Ringmer, South Chailey, South Street, Wivelsfield, and Wivelsfield Green)
5	Dispersing growth across all villages in the Low Weald
6	A new settlement within the Low Weald of between 2,000-5,000 new homes (none of the other options mention a specific housing number)

3.26 The document implies that there may be other options which might emerge as a result of the consultation, and that the new Local Plan may pursue one preferred option or a combination of options, stating advantages and disadvantages of each option.

3.27 The emerging Local Plan also considers other housing related issues and options, although in less detail, including:

- Affordable housing and whether the existing a target of 40% affordable housing on developments of 10 or more dwellings and the current plan's preferred tenure split of 75% affordable rented and 25% intermediate (shared ownership) housing is still appropriate;
- First Homes and the fact that due to the new government requirement, these would replace the current 25% shared ownership proportion of the requirement unless this is reviewed; and
- Questions over the proportion of homes that should be accessible and adaptable, the need for policies responsive to the need of younger and older households, first time buyers, and custom builders.

3.28 No specific options are outlined yet on these subjects. The results of the consultation processes and of representations received was published in May 2022<sup>21</sup>.

## Other relevant evidence documents

3.29 Aside from AECOM's LHNA, the emerging Local Plan will also be supported by other evidence base documents related to housing, most of which are still in production at the time of writing. Published at this time is a Topic Paper on Accommodating and Delivering Growth (July 2021)<sup>22</sup>, an 'Approach to Local Housing Need for Lewes district outside the South Downs National Park for the purposes of the Five Year Housing Land Supply' (May 2021)<sup>23</sup>, and a Topic Paper on Improving Access to Housing<sup>24</sup>.

3.30 The Council's **Land Availability Assessment (LAA)** is currently still in production at the time of writing our Needs Assessment, following an initial Call for Sites in 2020. An Interim Assessment report was published in February 2022<sup>25</sup>.

3.31 Another important piece of evidence, which is yet to emerge at the time of writing, is a **Whole Plan Viability Assessment**, which will assess the cumulative impact of all emerging Local Plan requirements (including affordable housing and infrastructure requirements through planning obligations, as well as design requirements such as on densities, housing standards etc through policy) and ensure that development in Lewes District remains viable.

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<sup>21</sup> [Issues and Options Consultation Summary Report FINAL\\_2\\_.pdf \(lewes-eastbourne.gov.uk\)](#)

<sup>22</sup> [Microsoft Word - Topic Paper 3 Accommodating and Delivering Growth v3 \(lewes-eastbourne.gov.uk\)](#)

<sup>23</sup> [312585.pdf \(lewes-eastbourne.gov.uk\)](#)

<sup>24</sup> [Microsoft Word - Topic Paper 4 Improving Access to Housing v3 \(lewes-eastbourne.gov.uk\)](#)

<sup>25</sup> [Microsoft Word - The Lewes LAA 2022 Report.docx \(lewes-eastbourne.gov.uk\)](#)

- 3.32 The **SDNPA**, for its Local Plan also separately collected **housing evidence** in topic papers on Housing Supply and Affordable Housing, as well as a SHLAA (2016), SHMA (2015), and Housing and Economic Development Needs Assessment (HEDNA 2017)<sup>26</sup>.
- 3.33 Neighbouring **Brighton and Hove**, who share a HMA with Lewes (see previous section for more detail on understanding and defining the HMA), have produced a SHMA in 2008, an Assessment of Affordable Housing Need in 2012, a Housing Delivery Action Plan in 2019, and a SHLAA / 5 Year Housing Supply update in 2021<sup>27</sup>.

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<sup>26</sup> [Evidence and Supporting Documents - South Downs National Park Authority](#)

<sup>27</sup> [Development Plans \(brighton-hove.gov.uk\)](https://www.brighton-hove.gov.uk)



## 4. Local Housing Need

- 4.1 This section reviews and summarises Lewes District Council's (LDC's) own calculation of the district's Local Housing Need Figure (LHNF), using the government's Standard Method. This output can be considered the baseline expression of the scale of need in future years, which may be subject to other factors applied when policies are developed for the emerging Local Plan.
- 4.2 This section also considers the impact of varying the household projection input, given the Government's intention to review the continued use of the 2014 based household projections following the results of the Census 2021. The section further considers how this need should be apportioned to the part of the district outside of the SDNP.

### Introduction

- 4.3 As stated in our section on National Policy Context, NPPF paragraph 66 states that strategic policy-making authorities "should establish a housing requirement figure for their whole area which shows the extent to which their identified housing need (and any needs that cannot be met within neighbouring areas) can be met over the Plan period".
- 4.4 This has been undertaken in a paper published by the Council in May 2021 entitled 'Approach to Local Housing Need for Lewes District Outside the South Downs National Park for the Purposes of the Five Year Housing Land Supply.'
- 4.5 The paper calculates the overall LHNF for Lewes district including the parts which fall within the South Downs National Park (SDNP) and then disaggregates the result to exclude the SDNP area, resulting in a residual figure for the remainder of the district under the planning jurisdiction of LDC. This approach aligns with that taken in the Lewes Local Plan Part 1: Joint Core Strategy with SDNP, which disaggregated the overall need for housing between the two authorities following a legal challenge requiring this step to be taken.
- 4.6 This is also in compliance with PPG, which states that "where strategic policy-making authorities do not align with local authority boundaries, an alternative approach will have to be used", including using methods "determined locally".<sup>28</sup>
- 4.7 As part of this LHNA, AECOM have been asked to summarise and review the LDC rather than calculate the Standard Method result afresh or propose an alternative approach to disaggregating the need. The method and findings of the LDC paper are summarised in the following section overleaf. It is important to emphasise that the LDC paper was prepared to inform the District's Five Year Land Supply rather than with the specific intention of informing its housing requirement in the emerging Local Plan.

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<sup>28</sup> Paragraph: 014 Reference ID: 2a-014-20190220, at <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>.

## Summary of the LDC paper on housing need

- 4.8 The baseline housing need figure for the whole of Lewes (including the SDNP) is calculated using the Standard Method outlined in PPG in February 2019 and updated (in part) in December 2020.<sup>29</sup> The result is a need for 782 homes per year.
- 4.9 This is disaggregated to the parts of the district falling inside and outside of the SDNP with reference to the current housing stock in each area, an input that featured in the Government's proposed Changes to the Current Planning System, outlined in August 2020. However, these changes were eventually not taken forward.
- 4.10 The data source used for the existing stock of dwellings is the Local Land and Property Gazetteer (LLPG), which can be segmented geographically at a granular scale. The LLPG identified 45,180 dwellings in Lewes District in 2021, of which 34,693 were located outside of the SDNP. This is 77% of the total.
- 4.11 On the basis that the share of future need is in proportion to the share of the existing stock, 77% of the Standard Method figure of 782 is attributed to the parts of the district outside of the SDNP. The result is 602 homes per year.
- 4.12 The paper specifies that the residual need for the part of Lewes falling within the SDNP (782 – 602 = 180) does not necessarily represent the need for this area. That remains for the SDNP authority to establish. It is only included in the paper as a step in the process for identifying the need of the parts of Lewes outside of the SDNP.
- 4.13 It is also noted that the housing need of the part of the SDNP that falls within Lewes District (114), as formerly calculated in the SDNP Housing & Economic Development Needs Assessment in 2017, could not simply have been deducted from the current overall Lewes figure because the SDNP figure predates the Standard Method.

### AECOM review

- 4.14 AECOM has reviewed the LDC paper summarised above, replicating its calculations and checking its interpretation of the relevant PPG. AECOM can confirm that, in its professional opinion, LDC's interpretation of PPG, notably the fact that a locally determined approach was taken, is in accordance with PPG.
- 4.15 It is also worth noting that the 10 year period for the household projection input can now be updated, along with the affordability uplift input since LDC produced its policy paper. AECOM has calculated the figures for the period 2023-2033 (using the 2014 based household projections) and inputted the latest median house price to earnings affordability ratio. These updates do not alter the figure which results from the standard method calculation (782).
- 4.16 AECOM also agrees that the principle of disaggregating need using dwelling stock statistics is sound and benefits from simplicity and replicability. An alternative source for this step to the LLPG would be population statistics. As shown in Section 5 of this LHNA

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<sup>29</sup> Paragraph: 004 Reference ID: 2a-004-20190220, at <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>

on Demand: People and Households, the population of the parts of Lewes outside of the SDNP was 73,316 in 2011, or 73.4% of the total of 99,909. This is a lower share than the 77% of dwellings in 2021 cited in the LDC paper. The population of households outside of the SDNP is slightly higher at 73.7%. Since these calculations were undertaken, Census 2021 dwelling stock data has been released (March 2023). Interestingly, the share of the dwelling stock outside of the SDNP, as recorded by the Census 2021, is the same as the share of the population (73.4%). If either the population or dwelling stock share from Census 2021 is used to disaggregate the housing need figure, this would result in a figure of 574 dwellings for the Lewes Local Plan area (area outside of the SDNP). Given the Census data appears aligned and it is available from a readily accessible data source, AECOM would suggest this method might be preferred in terms of apportionment.

- 4.17 The Standard Method calculation set out in the paper's Appendix 2 is considered sound, except for one immaterial aspect. When considering the cap on the level of growth that features in the process, one of the potential inputs is the most recently established housing requirement figure for the District. The paper states that this figure is 345 for the whole District and 275 for the parts of it falling outside of the SDNP. It then proceeds to take forward the 275 figure. However, because the result of the Standard Method calculation is subsequently disaggregated to the areas inside and outside of the SDNP, this approach effectively allows for the need in the SDNP area to be discounted twice. AECOM recommends that it would be more appropriate to take forward the figure for the whole District of 345 at this stage of the calculation.
- 4.18 However, the cap on growth is applied on whichever is higher of the most recently established housing requirement and the projected annual household growth. In this case, the latter is higher and forms the basis of the cap. For this reason, the choice to use the 275 rather than the 345 figure does not flow through to the rest of the Standard Method calculation nor its result. As such, this point is recommended for consideration by LDC for the next time the Standard Method calculation is undertaken and published.

## **Implications of Alternative Household Projections**

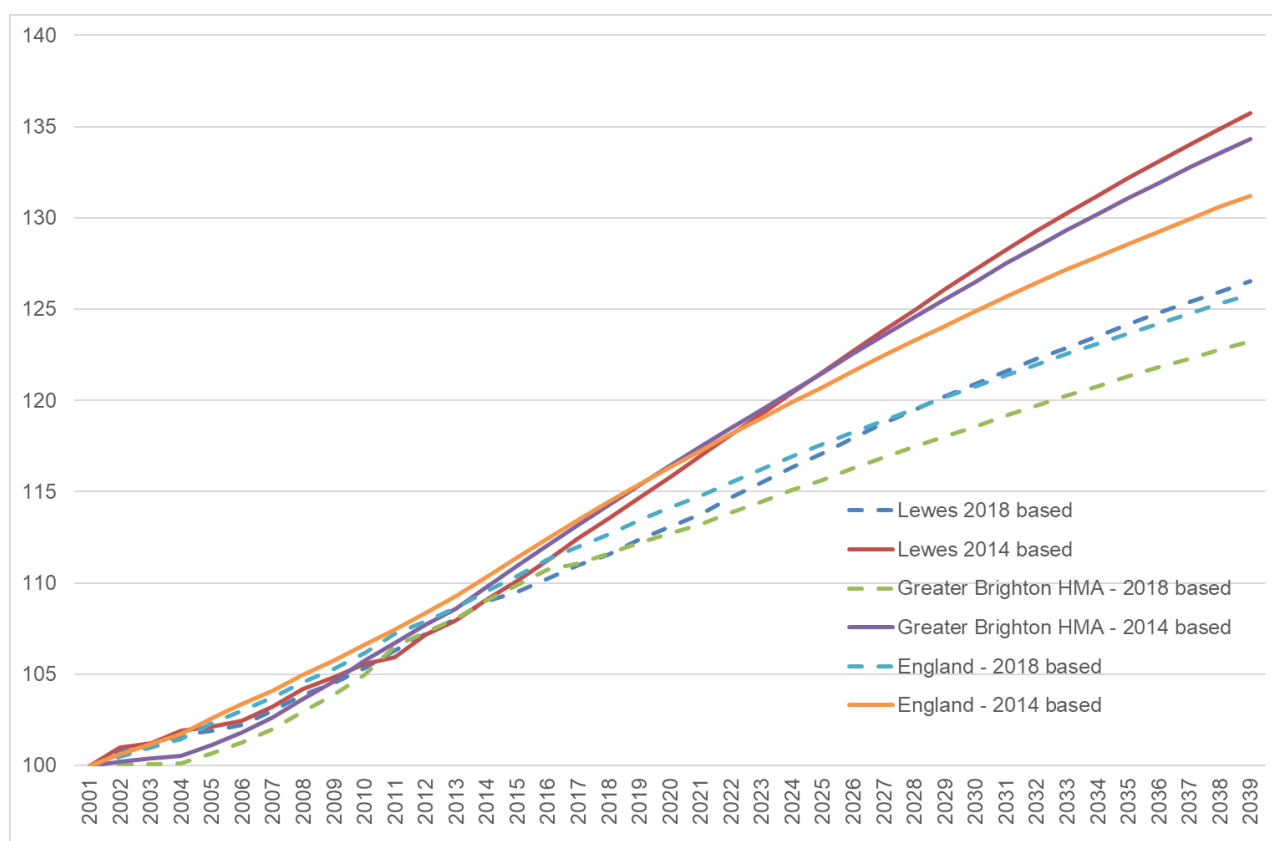
- 4.19 Given the Government's commitment to review household projections following the 2021 Census, LDC asked AECOM to consider how this might impact on the standard method calculation.
- 4.20 It is outside of the scope of this LHNA to produce household projections based on the 2021 Census. However, the ONS 2018 based household projections are closest to the actual Census 2021 results for Lewes District (compared to other sets of household projections including 2014 and 2016 based). As such, AECOM consider it logical to use these in the interim to anticipate how 2021 based projections may impact on the current standard method.
- 4.21 The ONS 2018 based household projections for Lewes expected 45,415 households in the district in 2021. The number of households recorded by Census 2021 in Lewes

District was 43,694 households. The 2018 based projection was therefore an over estimate by 1,721 households.

4.22 However, the Census 2021 household results were substantially lower than what was projected by the 2014 based household projections which expected 47,114 households in Lewes by 2021. These projections over estimated households in 2021 by 3,420.

4.23 The difference between the 2014 based and 2018 based projections is maintained across all relevant geographies. Figure 4-1 shows that for the Greater Brighton HMA area and England, the 2018 based household projections anticipated lower growth than the 2014 based projections.

**Figure 4-1: Comparison of 2014 and 2018 Based Household Growth Projections, Lewes District, Greater Brighton HMA and England**



Source: DLUHC 2014 based and 2018 based household projections

4.24 Table 4-2 shows that, if 2018 based projections are used instead of 2014 based projections, the housing need figure resulting from the current standard method process would be 517 (rounded) dwellings in Lewes District, 397 (rounded) dwellings in the part of Lewes District outside of the SDNP (see rows 3 and 4).

4.25 Table 4-2 does not change any other variables such as the scale of any affordability uplift. As such, the use of 2018 based projections allows a simple test of the standard method results based on projections which appear closer to the Census outturn but they do not present the full picture. As discussed in paragraph 4.16 above, if the apportionment to Lewes Local Plan area (outside the SDNP) is done on the basis of the

Census 2021 share of population or dwellings, the figure would be 574 (rounded) under the existing standard method, or 379 (rounded) if 2018 based household projections are used (see rows 5 and 6).

**Table 4-2: Standard Method Calculation with 2018 based Household Projection Scenario**

	Scenario	Lewes District	Part outside SDNP
1	LDC calculated Standard Method (in LDC policy paper)	782.3	600.7*
2	LDC calculated Standard Method (in LDC policy paper) with 2018 based projections	516.9	396.9*
3	Updated Standard Method (as at 23 <sup>rd</sup> March 2023)	781.9	600.4
4	Updated Standard Method (as at 23 <sup>rd</sup> March 2023) with 2018 based projections	516.9	396.9
5	Updated Standard Method (as at 23 <sup>rd</sup> March 2023)	781.9	574.2**
6	Updated Standard Method (as at 23 <sup>rd</sup> March 2023) with 2018 based projections	516.9	379.4**

*Source: AECOM calculations of standard method \*LDC rounded dwelling stock outside SDNP to 77% in its calculation which accounts for small difference with AECOM calculation which uses 76.8%. \*\*Apportionment to part of Lewes District outside of the SDNP based on its share of population and dwellings in 2011.*

## Next steps

- 4.26 PPG<sup>30</sup> states that “Housing need is an unconstrained assessment of the 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”.
- 4.27 An LHN is therefore a ‘policy-off’ figure. This means that, while it takes account of the factors as set out paragraph 67 of the NPPF, it is an expression of total potential housing demand unconstrained by the limits of the land available to build on. It is also unconstrained by the impact of policies that either facilitate or constrain development. A policy-off figure can then be reviewed in light of further evidence including environmental constraints, land availability, relevant Local Plan objectives and policies, and the need to align (formerly Duty to Cooperate) with neighbouring authorities to formulate a ‘policy-on’ HRF. Note the Levelling Up and Regeneration Bill (2022) plans to repeal the current Duty to Cooperate and replace it with a more flexible alignment test (yet to be defined).
- 4.28 The figure calculated in the LDC paper, using the standard method, is therefore the starting point for deciding how many homes need to be planned for over the emerging Local Plan period or for any formal housing requirement figure. The Standard Method calculation may also need to be updated using the latest data prior to the establishment

<sup>30</sup> Paragraph: 001 Reference ID: 2a-001-20190220 at <https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments>

of Lewes District's housing requirement. When this takes place, the same approach to disaggregation using the same sources (also updated to the latest data) can be applied.

## 5. Demand: People and Households

### Introduction

5.1 This section examines the key evidence on the nature of demand for housing within Lewes district. Changes in the age and composition of households within the district and wider market area influence the type of housing required. At different life stages, often linked with age, households exhibit different needs and demands from their homes. However, patterns of income and wealth are often more important determinants of the scale of demand and the tenure, type, and size of homes that households choose to buy or rent, linked to their aspirations but balanced by the financial or other constraints they experience.

5.2 This section:

- Examines broad demographic changes and how these impact on demand for homes and the mix of housing needed;
- Examines patterns of incomes and wealth and how these impact on demand;
- Examines how the demographic and income evidence can allow segmentation of the household population into broad groups with different housing requirements; and
- Draws on evidence of preferences and aspirations that households have for their homes.

### Demographic change

5.3 The growth in the number of households in Lewes district over the Local Plan period 2020-2040 is a direct determinant of the district's housing requirement. The extent to which there is growth in the number of households depends on new household formation from within the district itself, changes in the makeup of existing households (e.g. ageing), and in and out migration of households to/from Lewes district. Migration is particularly dependent on economic growth and the number of new jobs created, and on in-migration of other households such as for the purposes of retirement or other moves which are not related to work. These dynamics affect not just the overall number of households within the district but also the characteristics of these households in terms of their age and composition.

5.4 Tables 5-1 to 5-4 present key data on the age structure of the population and the composition of households for the different relevant geographies (as set out in our section 2).

5.5 Recently released Census 2021 data confirms that the current population of the district is 99,909 people<sup>31</sup>, living in 43,700 households. This is broadly similar to the ONS mid-

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<sup>31</sup> There is a slight discrepancy in the 2021 Census figures for the total population of the district. Dataset TS007 (released 02/11/2022) gave a total population figure of 99,900 for Lewes district whilst dataset TS007A (released

year population projections for 2020, with the projections estimating more growth, of around 3,616 additional individuals, than the Census outturn. Despite this discrepancy, the respective proportion of population in each of the age categories in the projections and the Census are very similar (with only 1 percentage point variation). Between 2011 and 2021 there was an overall increase of 2.5% in the Lewes district population. Note that in terms of households, the latest ONS household projections before the Census 2021 were the 2018 based projections. The ONS 2018 based household projections for Lewes expected 45,415 households in the district in 2021. The number of households recorded by Census 2021 in Lewes district was 43,694 households. The 2018 based projection was therefore an over estimate by 1,721 households.

- 5.6 The population is ageing. However, due to a lower rate of population growth in Lewes district, this process has not been as pronounced as expected based on ONS projections. Actual figures show 158 individuals fewer aged 85+ compared to the projections. However, the proportion of the population in this category is stable at 4.1% in both datasets. The number of people aged 85+ has grown by 14.8% from 2011-2021. In the same time period, the proportion of the district population aged 65-84 increased from 19.1% to 22.4%.

**Table 5-3: Comparison of mid-2020 Age Structure and 2021 Census Age Structure, Lewes District**

	Mid-2020 Population Estimates		2021 Census	
	Raw Figures	%	Raw Figures	%
<b>0-14</b>	16,385	15.8%	15,600	15.6%
<b>15-24</b>	10,110	9.8%	9,327	9.3%
<b>25-44</b>	21,174	20.5%	20,524	20.5%
<b>45-64</b>	28,975	28.0%	27,994	28.0%
<b>65-84</b>	22,665	21.9%	22,406	22.4%
<b>85+</b>	4,216	4.1%	4,058	4.1%
<b>65+</b>	26,881	26.0%	26,464	26.5%
<b>Total</b>	103,525	-	99,909	-

*Source: ONS mid-2020 population estimates, Census 2021, AECOM calculations*

- 5.7 There has been an overall decline in the share of the younger population (aged 0-44) in Lewes district between 2011 and 2021. As noted above, there was a clear increase in the proportion of individuals in the older age categories, as shown in Table 5-7.
- 5.8 Tables 5-4 and 5-5 show that Lewes district in 2021 had a significantly higher proportion of population in the older age categories, with 26.5% of the population aged 65+

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in 2023) gave a total population for Lewes District of 99,909. The latter dataset released data at a localised level (with the former only available at a larger scale) and so has been used within the 'Demand: People and Households' chapter (to ensure the sub-areas add up to the entire District. The district-level calculations in the chapters such as 'Specialist Housing for Older People' and 'Supported Housing for Vulnerable People' use the 99,900 figure as were updated with 2021 Census data before the release of the latter dataset.



compared to 19.4% in the Greater Brighton HMA and 21.9% across the Greater Brighton & West Sussex SPBA. All of these geographies had a greater proportion of individuals aged 65+ than England, at 18.4%. The district therefore had a smaller proportion of young working age people with 20.5% of the population aged 25-44 compared to a range of 24.1% to 26.6% across the larger geographies.

**Table 5-4: Age Structure, 2021**

Age	Lewes District	Lewes (inside SDNP)	Lewes (outside SDNP)	Greater Brighton HMA	Greater Brighton & West Sussex SPBA	South East	England
<b>0-14</b>	15,600	4,009	11,591	110,792	152,642	1,616,541	9,838,977
<b>15-24</b>	9,327	2,633	6,694	85,891	114,019	1,040,517	6,633,345
<b>25-44</b>	20,524	5,142	15,382	180,350	241,101	2,361,683	15,043,659
<b>45-64</b>	27,994	7,986	20,008	191,306	269,024	2,455,067	14,572,764
<b>65-84</b>	22,406	5,621	16,785	116,616	184,973	1,550,881	9,029,002
<b>85+</b>	4,058	1,202	2,856	20,507	32,661	253,377	1,372,301
<b>65+</b>	26,464	6,823	19,641	137,123	217,634	1,804,258	10,401,303
<b>Total</b>	<b>99,909</b>	<b>26,593</b>	<b>73,316</b>	<b>705,462</b>	<b>994,420</b>	<b>9,278,066</b>	<b>56,490,048</b>

Source: Census 2021

**Table 5-5: Age Structure, 2021, %**

Age	Lewes District	Lewes (inside SDNP)	Lewes (outside SDNP)	Greater Brighton HMA	Greater Brighton & West Sussex SPBA	South East	England
<b>0-14</b>	15.6%	15.1%	15.8%	15.7%	15.3%	17.4%	17.4%
<b>15-24</b>	9.3%	9.9%	9.1%	12.2%	11.5%	11.2%	11.7%
<b>25-44</b>	20.5%	19.3%	21.0%	25.6%	24.2%	25.5%	26.6%
<b>45-64</b>	28.0%	30.0%	27.3%	27.1%	27.1%	26.5%	25.8%
<b>65-84</b>	22.4%	21.1%	22.9%	16.5%	18.6%	16.7%	16.0%
<b>85+</b>	4.1%	4.5%	3.9%	2.9%	3.3%	2.7%	2.4%
<b>65+</b>	26.5%	25.7%	26.8%	19.4%	21.9%	19.4%	18.4%

Source: Census 2021

5.9 In 2021 26.6% of the district's population fell within the SDNP, with the remaining 73.4% living outside the national park. When comparing the age structure of these sub areas to the wider district it can be seen that these are very similar. The area of Lewes inside the SDNP has a slightly greater proportion of the population aged 85+ than the area outside the SDNP and the district. However, it had a smaller proportion of the population aged 65+. This may be due to those in advanced old age moving to the areas of the district with specialist housing or care homes (particularly the coastal areas) when they require care or support.

5.10 In terms of the three sub-areas, 59.4% of the population in 2021 lived in the coastal sub-area, with 23.8% in the rural sub-area, and 16.7% in the town. The demographic make-up of different sub-areas within the district is varied:

- The coastal area has a greater proportion of the older population aged 65-84, especially when comparing to Lewes town (23.4% versus 18.8%).
- The rural area has the greatest proportion of the oldest households, with 4.6% of people aged 85+ compared to 4.1% in the coastal area and 3.1% in the town area.
- Lewes town has the greatest proportion of the older working population, aged 45-64 (30.8%, compared to 29.2% in the rural area, and 26.8% in the coastal area).
- Younger working age individuals, aged 25-44, tend to favour the town sub-area (21.3% compared to 21.1% in the coastal areas and 18.5% in the rural areas). This may be due to better availability of rented accommodation for younger households, or due to greater access to local jobs and amenities.

**Table 5-6: Age Structure, 2021, Lewes Sub-Areas**

Age	Coastal		Rural		Town	
	Count	%	Count	%	Count	%
<b>0-14</b>	9,171	15.4%	3,777	15.9%	2,652	15.9%
<b>15-24</b>	5,410	9.1%	2,209	9.3%	1,703	10.2%
<b>25-44</b>	12,552	21.1%	4,413	18.5%	3,564	21.3%
<b>45-64</b>	15,886	26.8%	6,962	29.2%	5,146	30.8%
<b>65-84</b>	13,903	23.4%	5,356	22.5%	3,144	18.8%
<b>85+</b>	2,460	4.1%	1,091	4.6%	510	3.1%
<b>65+</b>	16,363	27.6%	6,447	27.1%	3,654	21.9%
<b>Total</b>	59,382		23,808		16,719	

Source: Census 2021

**Table 5-7: Age Structure % Change 2011-2021**

Age	Lewes	Lewes (inside SDNP)	Lewes (outside SDNP)	Greater Brighton HMA	Greater Brighton & West Sussex SPBA	South East	England
<b>0-14</b>	-1.5%	-16.2%	+4.9%	+0.6%	+2.3%	+5.3%	+5.0%
<b>15-24</b>	-9.1%	-7.8%	-9.6%	-3.3%	-2.5%	-3.3%	-4.4%
<b>25-44</b>	-4.6%	-17.6%	+0.8%	-4.3%	-1.7%	+3.2%	+3.1%
<b>45-64</b>	+0.9%	+0.8%	+0.9%	+11.9%	+10.6%	+9.0%	+8.4%
<b>65-84</b>	+20.3%	+21.6%	+19.9%	+18.2%	+19.3%	+22.6%	+20.7%
<b>85+</b>	+14.8%	+35.4%	+7.9%	+5.0%	+7.7%	+16.7%	+16.3%
<b>65+</b>	+19.5%	+23.9%	+18.0%	+16.0%	+17.4%	+21.7%	+20.1%
<b>Total</b>	+2.5%	-2.6%	+4.5%	+4.3%	+5.8%	+7.5%	+6.6%

Source: Census 2021, Census 2011, AECOM Calculations

**Table 5-8: Age Structure % Change 2011-2021, Lewes Sub-Areas**

Age	Coastal	Rural	Town
0-14	+4.5%	-2.5%	-16.8%
15-24	-10.7%	-6.5%	-7.2%
25-44	+0.2%	-5.0%	-17.7%
45-64	+0.1%	+0.2%	+4.1%
65-84	+17.7%	+25.8%	+23.3%
85+	+6.5%	+41.3%	+12.6%
65+	+15.9%	+28.1%	+21.7%
<b>Total</b>	<b>+3.5%</b>	<b>+4.2%</b>	<b>-3.3%</b>

Source: Census 2021, Census 2011, AECOM Calculations

5.11 Turning to the make-up of households, the proportion of single person households in Lewes district in 2021 was just above national levels, but the proportion of older single person households aged 66+<sup>32</sup> was significantly higher (17.9% compared to 12.8% nationally). Lewes district had the greatest proportion of single person households aged 66+ than all of the comparator geographies. The proportion of family households aged 66+ in Lewes district was also above the levels for England (13.1% and 9.2% respectively). This shows a clear skew towards older households in Lewes district when compared to the country as a whole.

5.11 Households with children (including non dependent children) accounted for over a third of the district population in 2021. The proportion of households with children in the district was greater than across the HMA and SPBA but lower than at regional (36.8%) and national level (36.3%). A greater proportion of households inside the SDNP (33.7%) had children than outside the SDNP (33.1%).

<sup>32</sup> Note that the 2011 Census counted older households in household composition as 65+ but the 2021 Census counts those aged 66+

**Table 5-9: Household profile, 2021**

	Household Composition	Lewes District	Lewes (inside SDNP)	Lewes (outside SDNP)	Greater Brighton HMA	Greater Brighton & West Sussex SPBA	South East	England
<b>Single</b>	<b>Total</b>	<b>31.0%</b>	<b>32.0%</b>	<b>30.6%</b>	<b>32.1%</b>	<b>31.9%</b>	<b>28.4%</b>	<b>30.1%</b>
	Aged 66 and over	17.9%	18.1%	17.9%	14.0%	15.2%	13.2%	12.8%
	Other	13.1%	13.9%	12.8%	18.1%	16.7%	15.2%	17.3%
<b>Family</b>	<b>Total</b>	<b>63.5%</b>	<b>62.6%</b>	<b>63.8%</b>	<b>60.2%</b>	<b>61.0%</b>	<b>65.0%</b>	<b>63.0%</b>
	All aged 66 and over	13.1%	12.0%	13.4%	9.0%	10.6%	10.2%	9.2%
	Couple: no children	16.8%	16.6%	16.9%	17.4%	17.4%	17.4%	16.8%
	Couple: dependent children	17.4%	18.4%	17.0%	18.3%	17.6%	20.6%	18.9%
	Couple: all children non-dependent	6.1%	5.7%	6.2%	5.4%	5.6%	6.5%	6.3%
	Lone parent: dependent children	6.0%	5.8%	6.1%	5.7%	5.5%	6.0%	6.9%
	Lone parent: all children non-dependent	3.8%	3.8%	3.8%	3.7%	3.7%	3.7%	4.2%
	Other family household	0.3%	0.3%	0.4%	0.7%	0.6%	0.6%	0.8%
<b>Other</b>	<b>Total</b>	<b>5.5%</b>	<b>5.4%</b>	<b>5.5%</b>	<b>7.7%</b>	<b>7.1%</b>	<b>6.6%</b>	<b>6.9%</b>
	With dependent children	1.9%	1.7%	2.0%	1.9%	1.9%	2.5%	2.7%
	Other (including full-time students and all aged 66 and over)	3.6%	3.7%	3.5%	5.8%	5.2%	4.2%	4.2%

Source: Census 2021

5.12 Anticipated growth in the Lewes district population, as in most locations across the country, is expected to be led by the older segments of the population. A 40.6% increase in households with a household reference person aged 65+ is projected between 2020 and 2040 (Table 5-10). Households in this category will make up 47.3% of all households in 2040, compared 34.7% in 2011. Conversely, there is an anticipated decrease in households with reference persons aged 35-64, but a slight increase in those aged 25-34.

**Table 5-10: Percentage of projected households by age of household reference person (HRP) 2011 compared to 2020 and 2040 in Lewes District**

	<b>16-24</b>	<b>25-34</b>	<b>35-54</b>	<b>55-64</b>	<b>65+</b>
<b>2011</b>	841	3,456	15,022	8,193	14,648
<b>2020</b>	656	3,565	14,723	8,733	17,428
<b>2040</b>	658	3,816	14,355	8,515	24,509
<b>% Change 2011-2040</b>	-21.8%	10.4%	-4.4%	3.9%	67.3%
<b>% Change 2020-2040</b>	0.3%	7.0%	-2.5%	-2.5%	40.6%

Source: DLUHC Household Projections (2018 based), AECOM Calculations

## Specific groups

5.13 Paragraph 62 of the NPPF states that housing needs of different groups should be assessed and reflected in planning policies. The majority of specific groups are included in this section (families, older people), Section 8 (households who need affordable housing), 9 (older people) and 10 (people with disabilities). However, the groups specifically mentioned in the NPPF also include students and service families which are not given specific attention elsewhere in this LHNA.

5.14 The latest housing waiting list shows that there is one former service personnel household with additional priority given to their urgent housing needs. This is a snapshot in time and numbers may vary from year to year but this suggests there is very limited need for affordable housing for ex service personnel in Lewes District.

5.15 The PPG 'housing needs of different groups' (2021) gives some further detail on students but does not provide guidance on how needs should be analysed or addressed.<sup>33</sup> The PPG states that '*strategic policy-making authorities need to plan for sufficient student accommodation whether it consists of communal halls of residence or self-contained dwellings, and whether or not it is on campus. Encouraging more dedicated student accommodation may provide low cost housing that takes pressure off the private rented sector and increases the overall housing*

<sup>33</sup> Paragraph: 004 Reference ID: 67-004-20190722

*stock. Strategic policy-making authorities are encouraged to consider options which would support both the needs of the student population as well as local residents before imposing caps or restrictions on students living outside university-provided accommodation. Local Planning Authorities will also need to engage with universities and other higher educational establishments to ensure they understand their student accommodation requirements in their area.'*

- 5.16 Census 2021 records just over 2,000 students over age 18 in Lewes district. 65% live with parents, 21% in 'other' household type (eg sharing with others but not all students), 4% in communal establishments, 6% in student only housing (which could include shared housing eg HMOs in the private sector), 4% living on own.
- 5.17 It is worth stating that the figures may be affected by Census being undertaken during Covid lockdown in 2021. Many students returned to live at home to avoid isolation and/or save costs.
- 5.18 Lewes district does not contain a University but is home to East Sussex College Lewes Campus near Lewes station (for 16-19 year olds). Furthermore, Sussex University and Brighton University are both located in neighbouring Brighton and likely to allow students to live in Lewes and commute to University. This may explain the high proportion of students who live with their parents and limited student housing in the district.

## **Demographic implications for the mix of housing**

- 5.19 It is possible to estimate the likely requirement for different sized homes in Lewes district based on the growth in different households over the plan period and how those types of households currently occupy homes. This approach is common to many SHMAs and LHNAs as a way of predicting the size mix of homes that might be required.
- 5.20 AECOM has modelled how households of different ages occupy their homes *currently*, in order to estimate the likely need for different dwelling sizes in the future, assuming that different age groups will continue to occupy their homes in the same way in future. This is a reasonable assumption to make since patterns of occupancy change slowly over time. The starting point for this modelling is the 2011 Census as multivariate data from the 2021 Census is not yet available. However, it is assumed that patterns of occupancy would remain. The following observations can be made:
- In 2011, most young households (74% of those aged 24 and under) lived in 1- and 2-bedroom properties. This is most prominent within the social rented sector, where 89.4% of young households live in 1- and 2-bedroom dwellings (compared to 76.5% in private rentals and 48.3% in owner occupied housing). This means that any growth in these households over the plan period is likely to translate into demand for smaller properties. An increase in older households



will also result in some increased demand for smaller properties since some of these households choose to downsize. We have assumed existing patterns (ie rate of downsizing) persist in the future.

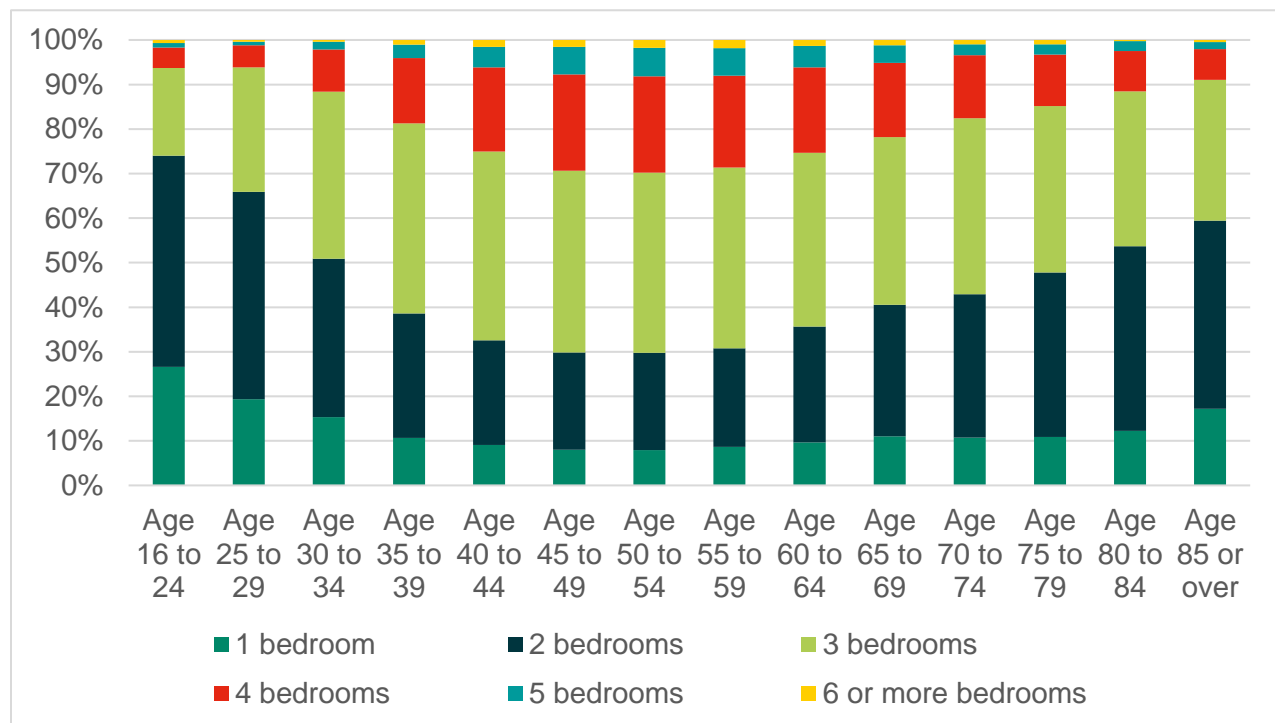
- Broadly, the size of home occupied increases with the age of the household, as shown in Figure 5-12. This reflects the fact that families grow and need more space and, importantly, that income and wealth tends to increase with age and allows these households to buy or rent more space. This trend is more pronounced within owner occupied households. Private rented and social rented households are more heavily dominated by 1, 2, and 3-bedroom dwellings, with these tenures more markedly driven by household size and income limitations. Social renting is also tied to local authority allocation policies.
- There is some decline in the size of homes occupied by those in the oldest age groups (65+) which reflects the fact that some of these households choose to downsize in later life. However, caution must be applied in interpreting these figures since they also reflect the preferences and opportunities of particular generations. The same pattern of downsizing or occupying smaller properties in later life may not be maintained over subsequent generations.

**Table 5-11: Size of dwelling by tenure, 2011**

	<b>Total</b>	<b>Owner Occupied</b>	<b>Private Rented</b>	<b>Social Rented</b>
<b>1-bedroom</b>	11.1%	4.5%	24.8%	36.2%
<b>2-bedroom</b>	29.7%	27.4%	38.1%	33.7%
<b>3-bedroom</b>	38.3%	41.9%	28.9%	27.0%
<b>4-bedroom</b>	15.8%	19.6%	6.5%	2.5%
<b>5-bedroom</b>	4.0%	5.0%	1.3%	0.5%
<b>6+ bedroom</b>	1.2%	1.5%	0.4%	0.1%

*Source: 2011 Census, AECOM Calculations*

**Figure 5-12: Age of household reference person to size, Lewes, 2011**



Source: 2011 Census

- 5.21 Table 5-13 examines the likely change in size mix of homes required in Lewes district for different tenures by the end of the Plan Period. This is based on modelling of household growth, applied to how households occupied their homes and the size mix in the stock at the time of the 2011 Census. 2011 data is used for occupancy patterns by age because multivariate data from Census 2021 is not yet available. It is unlikely that patterns have changed radically in the last 10 years.
- 5.22 Projections for the market housing mix are based on occupancy trends in owner occupied dwellings in 2011 whilst projections for affordable rented housing (including social and affordable rent) is based on 2011 occupancy patterns for social renters.
- 5.23 This modelling suggests that the greatest increase is required in 2-bedroom dwellings overall. This is most prominent in market housing, with a modelled increase of 38.9% in the demand for 2-bedroom dwellings by 2040 compared to 2011 stock. The modelled increase of demand for 3-bedroom market dwellings is also 38.9%. There is a need for an increase in market dwellings of all sizes, as demonstrated in Table 5-13, with affordable rented housing heavily more skewed towards smaller and mid-sized 1, 2, and 3-bedroom dwellings.
- 5.24 However, there are a number of serious caveats to this analysis, which also apply to other similar modelling exercises:

- First, this modelling embeds current patterns of occupancy. These may be undesirable e.g., where households are overcrowded.
- Second, the modelling uses household projections which typically project forward existing trends. If Lewes District Council wish to influence the mix of households in the district, a different pattern of homes may be required as part of any strategy.
- Finally, the modelling does not take account of income and wealth patterns directly. Whilst these factors are included indirectly through current occupancy patterns, household income and wealth patterns may change over time and for different generations, and impact on the way households occupy their homes. As income and wealth is not distributed evenly across households, these changes can have uneven results. For instance, some households may demand (and afford) larger homes, unrelated to their household size, and other households may be unable to afford to buy or rent enough space to meet their needs.

5.25 Additionally, development has taken place between 2011 (from which the baseline stock is derived) and 2021 will have resulted in changes since the Census.

5.26 Completions data by size of property is not available for after 2011. However, Section 6 shows that the current stock of housing in Lewes (based on the spaces that households occupied at the time of the 2021 Census) has changed over this period. The proportion of households living in smaller dwellings has decreased slightly in this period. Households living in 1, 2, and 3-bedroom dwellings marginally decreased their share, with the proportion of households living in 4+ bedroom dwellings increasing from 20.9% in 2011 to 22.7% in 2021. This is likely to reflect both the pattern of new completions in the district as well as changes (e.g. conversion and sub-division) of the existing stock. Overall, the size mix of housing remained relatively stable between 2011 and 2021.

**Table 5-13: Indicative mix of homes needed at the end of the Plan Period to 2040 in Lewes by broad tenure**

Number of bedrooms	Market	Affordable Rented	Overall
<b>1 bedroom</b>	7.1%	55.2%	12.6%
<b>2 bedrooms</b>	38.9%	30.7%	38.0%
<b>3 bedrooms</b>	38.9%	13.3%	36.0%
<b>4+ bedrooms</b>	15.1%	0.8%	13.5%
<b>Total</b>	100.0%	100.0%	100.0%

*Source: AECOM modelling using Census 2011 and ONS 2018 based household projections. Note 'market' includes owner occupied, private rented and affordable home ownership tenures.*

5.27 Table 5-13 indicates that, based on anticipated demographic changes, the majority of market homes required over the plan period to 2040 are likely to be 2-3 bedroom

properties, with lower demand for 1 and 4+ bedroom homes projected. Note that the market category includes private rented housing and affordable home ownership due the uncertainties in projecting how these tenures will expand for the following reasons:

- Private rented homes, with the exception of recent purpose built private rented schemes, are typically delivered through properties switching from owner occupation to private rented homes without a need for planning permission or a change of use. This occurs when owners choose to let out their homes, or as they are sold to landlords who then let them out. There is also some transfer from the social rented sector, via Right to Buy, but owner occupied properties are the key source of private rented homes. This means it is difficult to distinguish between owner occupied and rented properties when they are newly built, until they are occupied, and differences between private rented and owner occupation tenures is generally only recorded during a Census.
- The model uses projected changes in the age of households over the plan period to predict the tenure and size of homes required. As household growth in Lewes district is dominated by older households and because these households are less likely to live in the PRS, modelling in this way suggests a decline in the PRS over time. However, other trends are likely to prevent this happening, including worsening affordability of housing in the district which means that more older households will rent in later life than in previous decades.
- The affordable home ownership sector (primarily shared ownership homes) is too small to produce reliable and meaningful results using this approach.

5.28 However, examining the current characteristics of households living in the PRS and in affordable home ownership can provide useful insight into the likely future mix of homes needed in these tenures. This is considered in more detail in Section 6 which examines tenure by age and households. In both the PRS and affordable home ownership sectors:

- Households tend to be younger but there has been expansion in the number of older households living in the PRS over time (see Table 6-10).
- PRS households primarily live in 1-2 bedroom properties (61% of private renters in 2011), 3-bedroom homes also accounting for a substantial proportion (30% in 2011), but only a limited number of households privately rent larger properties.
- Take up of affordable home ownership (primarily shared ownership properties) is focused on smaller 1-2 bedroom homes, with a small proportion of 3-bedrooms. This is a pattern which is common across the country.

## Income and wealth patterns

- 5.29 Whilst demographic changes influence how much housing is needed and the mix of homes that might meet needs, the type of housing demanded is often more closely related to the income and wealth available to households. This is demonstrated by the fact that many small households choose to occupy larger properties if they can afford to do so.
- 5.30 It is important to keep in mind that household incomes are closely related to the macro economy, including overall economic growth and the particular type of employment opportunities available at the local level. Housing demand, therefore, which is strongly influenced by household income and income growth, is dependent on the performance of the local economy and the scale and nature of jobs created. A shift in some sectors to working from home or hybrid working may result in some decoupling of the relationship between the jobs available locally and demand for housing since some households will be able to choose to live at an increased distance from their workplace, enabled by home working arrangements.
- 5.31 Average household incomes in Lewes district compared to East Sussex are shown in Table 5-14 using CACI Paycheck data. Mean (average) household incomes for Lewes District are considerably higher than the median (the middle number when sorting the data from smallest to largest) at £45,487 and £37,793 respectively. The mean average is affected by the proportion of high income households which skews the average figure. Both the mean and median household incomes in Lewes are higher than average incomes across East Sussex.
- 5.32 Lower Quartile (LQ / lowest 25%) earnings and incomes are also helpful for understanding affordability challenges. Lower quartile earnings data is provided by ONS annual estimates of paid hours worked and earnings for UK employees at local authority level. Lewes' LQ average earnings for 2021 is £17,514. This figure represents earnings before taxes for individual earners. Households with two people on LQ earnings may have incomes of around £35,028.

**Table 5-14: Total household incomes, per annum**

	Lewes District	East Sussex
Mean income	£45,487	£42,710
Median income	£37,793	£35,118
Lower quartile income	£21,664	£19,829

Source: CACI Paycheck 2021

- 5.33 CACI estimates of LQ incomes for Lewes district suggest household incomes of around £21,664. As with average incomes, LQ incomes for Lewes are higher than across East Sussex as a whole. This estimate takes into account single and dual earnings households and so is likely to be more useful than the ONS individual earnings data.

5.34 Figure 5-15 shows the distribution of household incomes within Lewes district, that is, the number of households who have different incomes (presented in £5k income bands). This indicates that the greatest number of households in Lewes district fall within the £15,000 - £20,000 category. From this point onwards, the number of households in each income bracket generally falls as the income increases, with some slight fluctuation in the highest incomes, most notably a peak in the £100,000 - £120,000 bracket.

5.35 Figure 5-16 presents the same data as the percentage of households who have different incomes compared to East Sussex. It shows that Lewes and East Sussex follow very similar trends in terms of income distribution. There is some slight variation when looking at the lower income bands, with East Sussex having a very slightly higher proportion of households on lower incomes than Lewes district.

- Figure 5-17 shows the distribution of household incomes within Lewes as a cumulative percentage of households who have different incomes. This analysis is useful as it allows comparison with the cost of different housing tenures and products. For example, using data on the price of homes within Lewes district to rent or buy, it is possible to estimate that around 78%<sup>34</sup> of households cannot afford to access home ownership on the open market (based on lower quartile house prices in Lewes district).
- 53%<sup>35</sup> of households cannot afford to rent in the market (using 2-bedroom rents as the benchmark).
- Around 24% of households in Lewes district can afford to rent but cannot afford to buy on the basis of incomes, house prices and rents<sup>36</sup>.

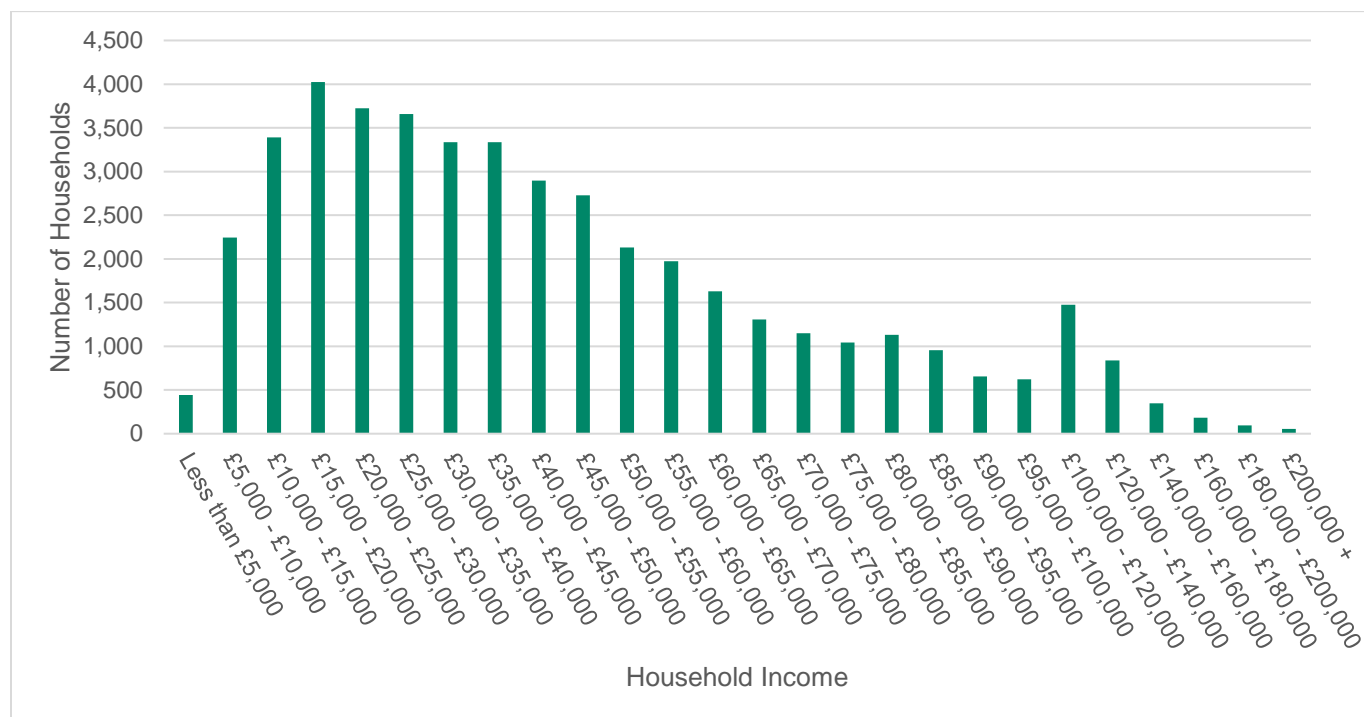
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<sup>34</sup> This is on the basis of households needing an income of £68,100 to afford to buy a LQ property with around 78% of households in Lewes having incomes below this level.

<sup>35</sup> This is estimated on the basis that households need an income of £39,800 to afford to rent a 2 bed property in Lewes, with around 53% of households having incomes below this level.

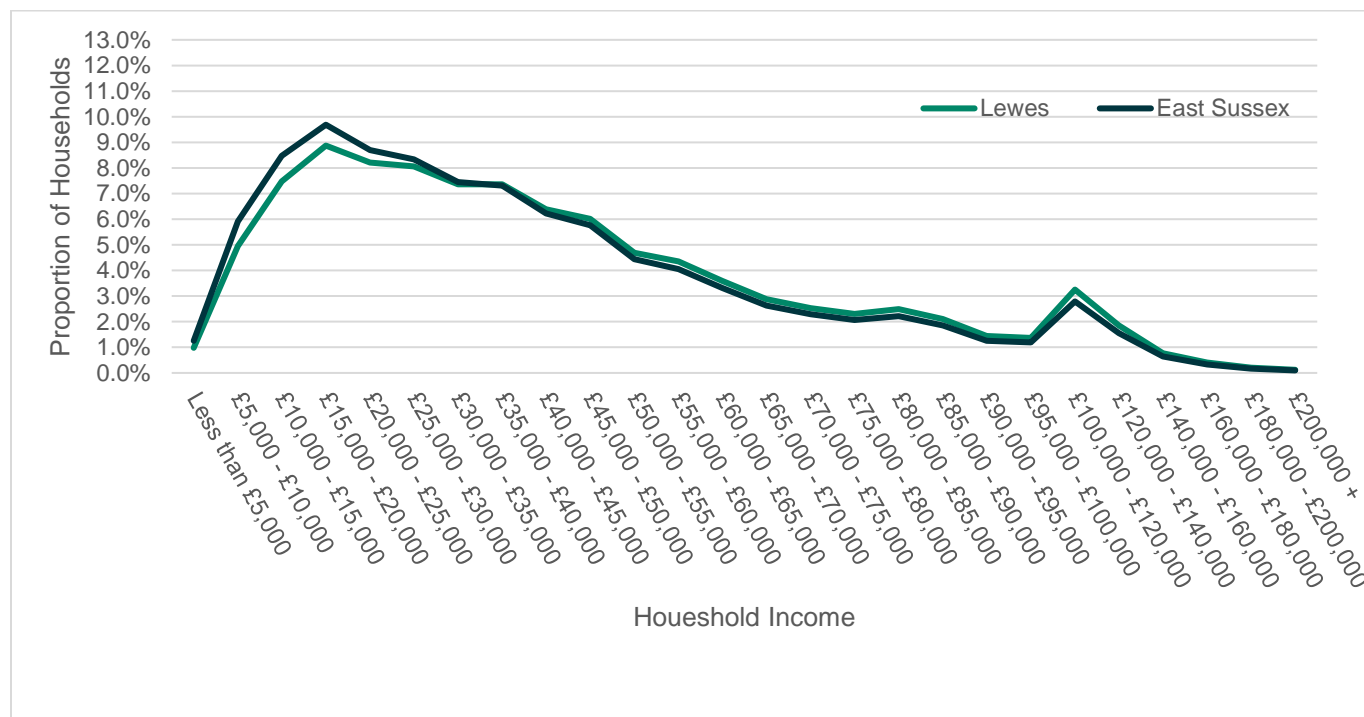
<sup>36</sup> This is the proportion of households who have household incomes between £39,800 and £68,100 – the gap between being able to afford to rent in the market but being unable to afford to buy.

**Figure 5-15: Number of households by household income, Lewes District**



Source: CACI Paycheck 2021

**Figure 5-16: Income distribution (proportion of households) in Lewes District and East Sussex**



Source: CACI Paycheck 2021



**Figure 5-17: Income Distribution (Cumulative Proportion of Households) in Lewes District**



Source: CACI Paycheck 2021, AECOM Calculations

5.36 In practice, households may have savings, equity or wealth which they can put towards their housing costs and which is not reflected in this income data. Moreover, wealth is not evenly distributed within the population.

5.37 The Resolution Foundation report<sup>37</sup> states that wealth has surged relative to income in recent years. In the 10-year period of 2006/08 to 2016/18, typical household incomes increased by 6%, whereas typical household wealth increased by 18% (i.e. three times the rate of income growth). It notes that pensions were the largest and fastest growing category of wealth during this time period. Furthermore, increasing wealth is not experienced evenly across the country. Thus, wealth is unequally shared, across income groups, generations, and spatially.

5.38 Different income groups experience the greatest inequality in wealth. This is not surprising given that higher income households are better able to save and invest. It is important to note that this wealth includes the value of homes owned, with those with higher household incomes more likely to be homeowners and therefore likely to have greater and increasing equity through their homes. This wealth (or equity) can be used to fund further home purchases and so demonstrates the scale of capital that a substantial number of households have and will choose to exercise in the housing market through subsequent purchases. The report outlines that rapid

<sup>37</sup> Available at: <https://www.resolutionfoundation.org/app/uploads/2019/12/Who-owns-all-the-pie.pdf>

house price growth in the South East between 2006-08 and 2016-18 has been a major driver in the wealth gap widening, with a 32% increase in median household wealth in the South East in this time period compared to 18% across England.

- 5.39 Generationally, the proportion of wealth has tended to favour those born in the 1950's as home ownership and (often) generous pensions for this group have allowed for greater wealth accumulation than those born before or after this. This has implications in terms affordability of housing for different age groups. A substantial proportion of households born in the post-war period (1950s) and now entering retirement age can afford more expensive dwellings than those at that age and in that position previously, or indeed in the future.
- 5.40 It is very difficult to take wealth into account in designing housing policies, particularly in relation to affordable housing, but analysis by Shelter, which segments the population according to demographic, income and wealth factors is a useful resource which provides some insight.
- 5.41 Shelter and ACORN collaborated to produce the report 'Housing Insights for Communities'<sup>38</sup>. It splits up UK households into different categories and groups based on how they are likely to respond to housing issues. It provides a useful segmentation of households according to age and life-stage, income and wealth, and the homes they tend to occupy. There is also some insight into their attitudes to housing.
- 5.42 Table 5-18 demonstrates the split between these different categories within Lewes district. It shows that a significant proportion of the population falls within two key categories; 'Wealthy Achievers' (34.0%), and 'Comfortably Off' (36.3%). When looking at the UK as a whole, the most prominent category is again 'Comfortably Off', although at a smaller percentage of the population (27.2%), followed by 'Wealthy Achievers', and then 'Hard Pressed'. The proportion of households in the latter group is greater at a UK level than in Lewes District specifically. This indicates that Lewes is skewed towards the more prosperous groups, with the proportion of households in the most challenging circumstances more significantly represented on a national level.
- 5.43 The groups identified as being dominant in Lewes district tend to represent a range of life stages. Those households classified as 'Comfortably Off' tend to own their own home, often detached or semi-detached dwellings. Within this category, 'Settled Suburbia' is by far the most common in Lewes, with this group characterised by "empty nesters" and retired couples. These households tend to have few housing worries and tend to be coming towards the end of their mortgages on generally mid-sized semi-detached dwellings or bungalows. Areas with a high proportion of

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<sup>38</sup> Note that this report is currently no longer available on the Shelter website, but a copy is available from AECOM if required.

households classified as 'Wealthy Achievers' are often rural or semi-rural with very high levels of owner occupation. These areas tend to predominantly house empty nesters and retirees. 'Affluent Greys' are the dominant sub-category within Wealthy Achievers in Lewes, consisting of prosperous households aged 40 and over living in large detached and semi-detached houses or bungalows. Whilst this group account for approximately 7.9% of UK households, this is much higher in Lewes district at 16.4% of households.

**Table 5-18: Household Types in Lewes District, Shelter 2011**

Key Groups	Household Group	Lewes	UK
<b>Wealthy Achievers</b>	<b>Wealthy Executives</b>	<b>11.3%</b>	8.6%
	<b>Affluent Greys</b>	<b>16.4%</b>	7.9%
	Flourishing Families	6.3%	8.8%
<b>Urban Prosperity</b>	Prosperous Professionals	3.0%	2.1%
	Educated Urbanites	3.5%	5.9%
	Aspiring Singles	3.8%	3.8%
<b>Comfortably Off</b>	Starting Out	4.8%	3.5%
	<b>Secure Families</b>	<b>10.9%</b>	14.9%
	<b>Settled Suburbia</b>	<b>13.6%</b>	5.8%
	<b>Prudent Pensioners</b>	<b>7.0%</b>	3.0%
<b>Moderate Means</b>	Asian Communities	0.0%	1.5%
	Post Industrial Families	2.9%	4.6%
	Blue Collar Roots	5.4%	7.7%
<b>Hard Pressed</b>	<b>Struggling Families</b>	<b>7.0%</b>	13.0%
	Burdened Singles	2.3%	4.2%
	High Rise Hardship	1.4%	1.6%
	Inner City Adversity	0.0%	2.0%

*Source: Shelter (2011) 'Housing Insights for Communities' using ACORN data. Bold highlights groups with highest proportion of households in Lewes*

5.44 Other dominant sub-categories in the district include 'Wealthy Executives', who are considered some of the most affluent households in the UK. This group tends to consist of professionals in senior roles, living primarily in large, detached dwellings. 'Secure Families' are also one of the more significant groups in the district, but the proportion of households that fall into this category is below UK average levels. This group includes a wider range of households, from families to empty nesters and

retirees. As with 'Settled Suburbia', mid-sized semi-detached dwelling are most prominent with this group. The majority of households are homeowners and those not currently aspiring to home ownership.

5.45 The final two categories that make up a substantial proportion of the population include 'Prudent Pensioners', and 'Struggling Families', both at 7.0%. 'Prudent Pensioners' are comfortably off, but less so compared to the other retiree groups discussed. They have a strong connection to their local area and tend to reside in flats or retirement homes. 'Struggling Families' differ from the other dominant groups in Lewes, with a smaller proportion of households falling into this category compared to nationally. This group includes a wide range of households, all with similar financial circumstances, often living in traditional estates of terraced and semi-detached dwellings. This group is generally positive about the delivery Affordable Housing in their area.

5.46 This demonstrates that in Lewes district there are a range of households with different resources and that this pattern will be reflected in the nature of demand for housing including, broadly:

- A substantial proportion of retired households, with 'Affluent Greys', 'Prudent Pensioners', and 'Settled Suburbia' accounting for 37.0% of households. These households are often settled in larger dwellings and may have interest in downsizing or moving to bungalows or other accessible dwellings in future. Some are also likely to have interest in the provision of Affordable Housing for local people, particularly affordable home ownership models for relatives such as grandchildren.
- A relatively large group of family households living comfortably or with significant wealth, generally being able to afford to buy mid-sized to large dwellings on the open market. Some may recognise that young people, including their children, will struggle to access the property ladder.
- A group of households with limited means, in terms of income and wealth. They may benefit from Affordable Housing, with some in need of social and affordable rents whilst others aspire to home ownership but do not currently have the means and would therefore benefit from affordable home ownership products.

### **Aspirations and preferences**

5.47 A review of the research literature and the AECOM team's experience in other areas suggests that there are some common ingredients which are important to meeting the housing needs of many different groups. Demographic factors (such as age and household type) are less important than 'life stage', financial resources and health factors. The latter factors are more likely to determine what people need and want from their homes. Nevertheless, there are a range of key ingredients for good housing which can be identified across a range of household groups. These are:

- **Spacious accommodation** and properties in a range of sizes (1, 2 and 3 bed) are important to all households. The number of bedrooms is not the focus for many households but whether the home feels spacious. This applies to market and affordable homes. For older households there remains demand for single storey as well as two storey house types. Similarly, older households tend to be willing to consider apartment living if the development feels secure, spacious and is in a good location, with appetite for extra facilities such as allotments and shared space for social events. In supported housing there is a need to consider the space for carers and family to stay and/or space for therapeutic activities.

The Covid-19 pandemic has also had an impact on how households use their homes and view spacious accommodation. Post-pandemic there is likely to be an increase in home working, whether this is permanent or temporary as a part of hybrid working, changing the way many households occupy their homes. It may therefore be assumed that households where one or more person works from home would seek more spacious properties, often with an extra bedroom which could be used as an office or study. The 2021 Census may offer greater clarity on the impact of the pandemic on working patterns and the way households occupy their homes.

- **Homes that enable active and fulfilling lifestyles.** The needs and aspirations of most households about their home relate to how it supports their lifestyle. Homes that support active and fulfilling lifestyles can help to reduce feelings of social isolation and loneliness, often associated with older households. Well-designed and adaptable homes are therefore important to allow older persons to continue active and sociable lifestyles, with a recent Anchor report<sup>39</sup> suggesting that, when asked about independence, 75% of older people want to continue to live in their own home as they get older, and 69% want to be able to continue to pursue their current way of living.

Regardless of whether households are older, cars are often essential to accessing services and activities which maintain the lifestyle people want to lead, especially in less urban areas with more limited public transport services. Parking may therefore remain a 'must have' for many households living in such areas. Conversely, expanding the public transport offer can provide a way to reduce the need for and reliance on private transport and car parking. The focus on lifestyle, in part, explains why location is so important in the choices households make about their homes. Whilst this is true across the spectrum of households, the ability of households to access homes which support their desired lifestyle will depend on their financial resources and will be constrained by affordability factors.

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<sup>39</sup> Fragmented UK: Reconnecting people by creating communities where people love living in later life. Anchor. Available at: <https://www.housinglin.org.uk/assets/Resources/Housing/OtherOrganisation/Anchor-Fragmented-UK-report.pdf>

- **Outside space is valued across household groups** and is also a factor in the wellbeing of many occupants. The Covid-19 pandemic has highlighted further the value of private outdoor space to households and may lead to greater demand for properties with gardens. This need not be provided in the form of large gardens for all household types as there will always be households that prefer more manageable spaces such as courtyard gardens, roof terraces, or generous balconies.
- **Good value housing and improved affordability** is important to all households from those renting to those buying, including households considering downsizing in later life. Affordability is largely a function of the operation of the wider housing market and the relationship between prices/rents and incomes. However, homes which have low running costs (e.g. lower energy bills, limited maintenance required etc.) can help to reduce overall housing costs and improve affordability, particularly for vulnerable households and those on fixed incomes. The focus on running costs has increased further recently, in light of the ongoing cost of living crisis caused by the rise in fuel prices and other associated costs.
- **Homes designed with a focus on wellbeing.** Whilst this should be a consideration for all households, it is a factor which is highlighted in particular by supported housing practitioners. Homes which are light and airy, making use of natural lighting, are regarded as beneficial to the health (including mental health) of occupants. Homes which are flexible, accessible, and adaptable also allow households to continue to live independently as their health or mobility needs change.
- **People want to feel 'secure' in their homes.** Feeling secure may mean different things to different households at different points in their lives. For families living in the private rented sector with children, this could mean needing to know they can stay in their rented home whilst their children attend a local school. This raises issues around tenure security in the private rented sector. For some older people, feeling secure may relate to feeling safe in their home and might include design features, outside lighting and access etc. For all households, the character and quality of the surrounding area is likely to influence feelings of security.
- **The importance of wider community services, activities, and networks.** Households of all kinds need and want a sense of community and mutual support. The integration of homes and occupants with the wider community is of critical importance. This is especially important to more vulnerable households where lack of support and isolation can lead to a decline in their health and wellbeing. Community spaces to meet and socialise and where activities can be hosted are an important component of this. During the pandemic, online community spaces have also been essential to keep people

connected (highlighting the need for good quality WiFi access), including those that may not have been able to access in-person spaces pre-pandemic. Whilst the importance of in-person community spaces being utilised post-pandemic cannot be underestimated, the incorporation of hybrid events (e.g. people having the option to join in-person events online, or dedicated online community spaces) may also be essential to ensure the most isolated people are included.

5.48 The aspirations of households are often similar despite differing life circumstances. For most households their aspirations relate to achieving a particular lifestyle from their home; rather than bricks and mortar features such as number of bedrooms or design.

5.49 Further review of specific literature reveals some different preferences and aspirations amongst buyers of *new* homes and amongst renters. The literature on these subjects is relatively limited but can nevertheless provide some useful insight.

### **New homes**

5.50 The Joseph Rowntree Foundation (2004)<sup>40</sup> and the NHBC (National House Building Council) in 2018<sup>41</sup> have examined preferences and priorities for buyers of new-build housing.

- Many households value new-builds for practical reasons such as fixed prices and move in dates and avoidance of bidding or getting involved in an onward chain.
- There is little evidence to suggest that buyers are motivated primarily by the quality or novelty of new builds.
- Buyers tend to prefer developments where there is a good variety of design and layouts (in terms of kitchen/ dining/ living room space) – the internal and external design are seen as important factors.
- Most buyers would like enough external space to have appropriate car parking and private garden provision.
- Purchasers are also often attracted to the lower maintenance effort associated with a new build home.
- Other priorities, particularly amongst suburban markets, include off street parking, location, new home warranty, living space, neighbourhood quality and energy efficiency.
- Different groups may have some different priorities:

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<sup>40</sup> <https://www.jrf.org.uk/report/why-do-people-buy-new-build-housing> (2004)

<sup>41</sup> <http://www.nhbc.co.uk/media-centre/articles/pressreleases/priorities-of-new-home-buyers/> (2018)



- First time buyers are usually concerned with the financial implications of purchasing a house and look to schemes such as Help to Buy;
  - Up-sizers prioritise off street parking as well as the size and design of living space, favouring open plan, as well as having a garden;
  - Relocators attach importance to off street parking and neighbourhood quality/ amenities;
  - Downsizers often desire minimum maintenance and good energy efficiency; and
  - Modern technology (such as smart heating) is rated amongst downsizers and first time buyers.
- Most buyers value amenities associated with location such as local bus stops, health services and schools.

5.51 These preferences do not reveal anything radically different about the buyers of new homes in terms of the size or type of homes they may seek. However, they may be more likely to value the ease of purchase, particularly where they are reliant on products which allow them to access home ownership e.g. Help to Buy or other incentive schemes offered independently by developers. Agents confirm that the Help to Buy caps have driven the size of homes offered on many new schemes as developers ensure that the overall price does not exceed the cap for the scheme.

5.52 Buyers of new homes may also be more attracted to low maintenance and energy efficiency, particularly as materials and energy costs have been rapidly rising recently.

5.53 Buyers of new homes also value spacious living space. This confirms wider research on the preferences of households generally. Properties may be considered 'spacious' whether they have one or four bedrooms. This quality may be more about the internal layout and room size rather than the number of bedrooms. The evidence above suggests that new home buyers value the fact that there is also a variety of internal layouts and external designs on new developments which give them choices about their homes and lifestyles.

## Renters

5.54 There are some specific housing attributes that renters value and which are sometimes different to those of home buyers. Priorities vary according to the type of household. Whilst the UK Tenant Survey in 2019 highlighted the top preference amongst renters as being en-suite bathrooms and dedicated secure parking, this is likely to reflect the larger share of younger renters in the sample.<sup>42</sup>

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<sup>42</sup> <https://www.knightfrank.co.uk/research/the-uk-tenant-survey-2019-6118.aspx> (2019)

5.55 Research by Savills<sup>43</sup> suggests a broader range of preferences and ingredients that are attractive to households who rent in the private sector:

- Allocated off-street parking is preferred over on-street parking and tenants are willing to pay more for the privilege;
- Spacious homes are valued amongst families with children and tenants are willing to pay more for extra space;
- Open plan kitchens tend to be favoured amongst family and younger households but less so by older tenants;
- Tenants who share homes desire to have bedrooms of an equal size and are willing to pay more for en-suites;
- Lack of storage facilities is a current concern for renters. Some would be willing to pay extra for external storage (e.g. for bikes, luggage etc); and
- Other themes include safety considerations, noise reduction, energy efficiency (mainly with regard to heating and insulation) and space and provisions for recycling.

## Summary

5.56 There are a number of observations that are worth highlighting because they shed light on the nature of demand within Lewes.

5.57 The 2021 Census showed that approximately 26.6% of the district's population fell within the SDNP, with the remaining 73.4% outside of the national park. The area outside the SDNP had a greater proportion of the population aged 65+ although the area inside the SDNP had a greater proportion of the population aged 85+. The greatest proportion of the older population (aged 65-84) in 2021 lived in the coastal sub-area, with the greatest proportion of the oldest population (aged 85+) living in the rural sub-area.

5.58 Lewes' 2021 district population has a significantly older skew than the larger comparator geographies, and anticipated growth to 2040 is expected to be led by this older population. Households aged 65+ are projected to make up 47.3% of all households in 2040, compared to 34.7% in 2011. Whilst many older households choose to continue to occupy large properties in later life, particularly in the market sector, some choose to downsize into smaller properties. As the older population grows, therefore, this will increase the demand for more modest sized homes.

5.59 Family households under 65 with dependent children are the dominant household type within Lewes, followed by single person households aged 66 and over. Overall, the district has a higher proportion of family households than the larger comparator

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<sup>43</sup> [http://pdf.savills.com/documents/What\\_do\\_tenants\\_really\\_want\\_pdf\\_report.pdf](http://pdf.savills.com/documents/What_do_tenants_really_want_pdf_report.pdf)

geographies. Generally, this feeds through into need and demand for family sized homes.

- 5.60 Households in Lewes have higher median and lower quartile incomes than across East Sussex as a whole, with the difference in household incomes greater at the median level.
- 5.61 AECOM modelling provides an indicative size mix of homes required in Lewes district for market and affordable housing by 2040. This modelling suggests that the greatest increase is required in 2-bedroom dwellings across all tenures, closely followed by 3-bedroom dwellings. In the market sector, the majority of new homes required are likely to be 2-and 3-bedroom dwellings, with a smaller proportion of need for 1- and 4-bedroom dwellings.
- 5.62 In the affordable rented sector, the model suggests that it is primarily 1- and 2-bedroom dwellings that will be needed. However, this should not prohibit the delivery of larger dwellings for social/affordable rent as there will likely always be larger families in the local authority area with a need for affordable housing to rent. Note that the modelling does not take account of the Council's housing register and the priority given to different households on this.
- 5.63 Between 2011 and 2021 the proportion of households living in smaller and modest sized dwellings has decreased slightly whilst the proportion of households living in 4+ bedroom dwellings increased slightly. Overall, the size of dwellings that households occupy has remained relatively stable over the decade. However, dwelling stock information is not available so this broad pattern of household occupancy from Census 2011 and 2021 data may mask particular concentrations of sizes and types of unoccupied dwellings.

## 6. Housing Stock & Supply

### Introduction

- 6.1 This section considers the existing housing stock in terms of the tenure, type and sizes of homes. It also examines the pattern of recent supply within Lewes district's sub-areas, and comparison geographies. The extent to which the housing supply meets the identified local need and demand of Lewes, and the implications of an unbalanced housing market, are important considerations for housing policy.
- 6.2 The nature of the housing stock reflects historic development patterns which have responded to local demands and needs, employment patterns, infrastructure provision, and the local landscape and context. The nature of the housing stock, including the price, in turn influences the types of households who can live within Lewes. It is a key factor in selective in- and out-migration, i.e. people moving to and from the area in search of a dwelling which is suitable to their household and which they can afford.
- 6.3 It is important to keep in mind that Lewes sits within the Greater Brighton Housing Market Area (HMA) and wider Greater Brighton and Coastal West Sussex Strategic Planning Board Area (SPBA). The housing stock therefore not only contributes to the local mix, but also to the wider geographical scales. Section 2 demonstrated strong links between Lewes district and Brighton and Hove in terms of migration and travel to work. Nevertheless, where there are broad imbalances in the housing stock at the local level, policies which aim to improve the mix of housing, either in terms of tenure, type, or size, are justified to ensure the local need and demand is met.

### Tenure

- 6.4 Table 6-1 identifies the tenure of households in Lewes district and wider comparison geographies in 2021. Table 6-2 identifies the tenure of households in Lewes district and the sub-areas *within* Lewes, including the SDNP, in 2021. The tenure type of households is expressed as a percentage of the total households for a given geography.
- 6.5 Owner occupiers comprise approximately three quarters of households in Lewes (71.7%). The proportion of owner occupier households in Lewes is greater than across the comparison geographies of the Greater Brighton HMA (63.1%), Greater Brighton and Coastal West Sussex SPBA (64.8%), South East (65.7%), and England (61.3%).
- 6.6 The high proportion of owner-occupied households in Lewes is primarily driven by areas outside of the SDNP (71.7%), and within both the Coastal Sub-Area (71.9%) and Rural Sub-Area (73.6%). The area inside the SDNP (69.6%), and the Town Sub-Area (65.3%), which is entirely within the SDNP, have lower proportions of owner-

- occupation. The proportions of owner-occupied households inside the SDNP and Town Sub-Area are more consistent with the comparison geographies of the Greater Brighton HMA (63.1%), Greater Brighton and Coastal West Sussex SPBA (64.8%), South East (65.7%), and England (61.3%).
- 6.7 Just over a quarter of households in Lewes district as a whole live in rented housing (27.8%), with a greater proportion in private rented dwellings (16.9%) compared to social rented (10.9%). Corresponding to the greater level of owner-occupied households, the proportion of rented households in Lewes is less than the comparison geographies of the Greater Brighton HMA (35.9%), Greater Brighton and Coastal West Sussex SPBA (34.1%), South East (32.8%), and England (37.6%).
- 6.8 Consistent with a higher proportion of owner occupier households, the smaller proportion of households who rent (private and social rent) in Lewes is primarily driven by the areas of Lewes outside the SDNP (27.1%), both within the Coastal Sub-Area (27.1%) and Rural Sub-Area (25.0%). The proportion of households who rent in Lewes inside the SDNP (29.7%), is also however, slightly lower than in the larger comparison geographies of the Greater Brighton HMA (35.9%), Greater Brighton and Coastal West Sussex SPBA (34.1%), South East (32.8%), and England (37.6%). This may be primarily due to the smaller proportion of households who rent in the Rural Sub-Area (25.0%) as the proportion of households who rent in the Town Sub-Area (34.1%) is similar to the comparison geographies of the Greater Brighton HMA, Greater Brighton and Coastal West Sussex SPBA, South East, and England.
- 6.9 Breaking down the rented housing market, the proportion of households who rent privately is broadly consistent across Lewes district (16.9%), both inside the SDNP (17.1%) and outside the SDNP (16.8%), and across the Sub-Areas (14.0% to 17.8%). The proportion of social rented households in Lewes district (10.9%) and the immediate comparison geographies – Greater Brighton HMA (12.4%), Greater Brighton and Coastal West Sussex MA (12.2%), the South East (13.6%), and England (17.1%) – are lower than private rented households.
- 6.10 The proportion of social rented households has greater variance than private rented households, both inside the SDNP (12.6%), outside the SDNP (10.3%), and most significantly across the Sub-Areas (9.4% to 16.3%). The Coastal Sub-Area contains the lowest proportion of social rented households (9.4%), below the proportion in Lewes and also below the larger comparison geographies levels. The Lewes Town Sub-Area contains a much greater proportion of social rented households (16.3%), the closest of all comparator areas to national levels.
- 6.11 Owner occupier households are the dominant tenure in Lewes and occupy a significantly larger proportion of housing stock than in the comparison geographies. Conversely, Lewes comparatively does not contain as many rented households.

This may limit the types of households that can live within the district. The proportion of owner occupier and social rented households is a key influencing factor for the tenure profile of the Sub-Areas of the district due to the proportion of private rented households being relatively consistent.

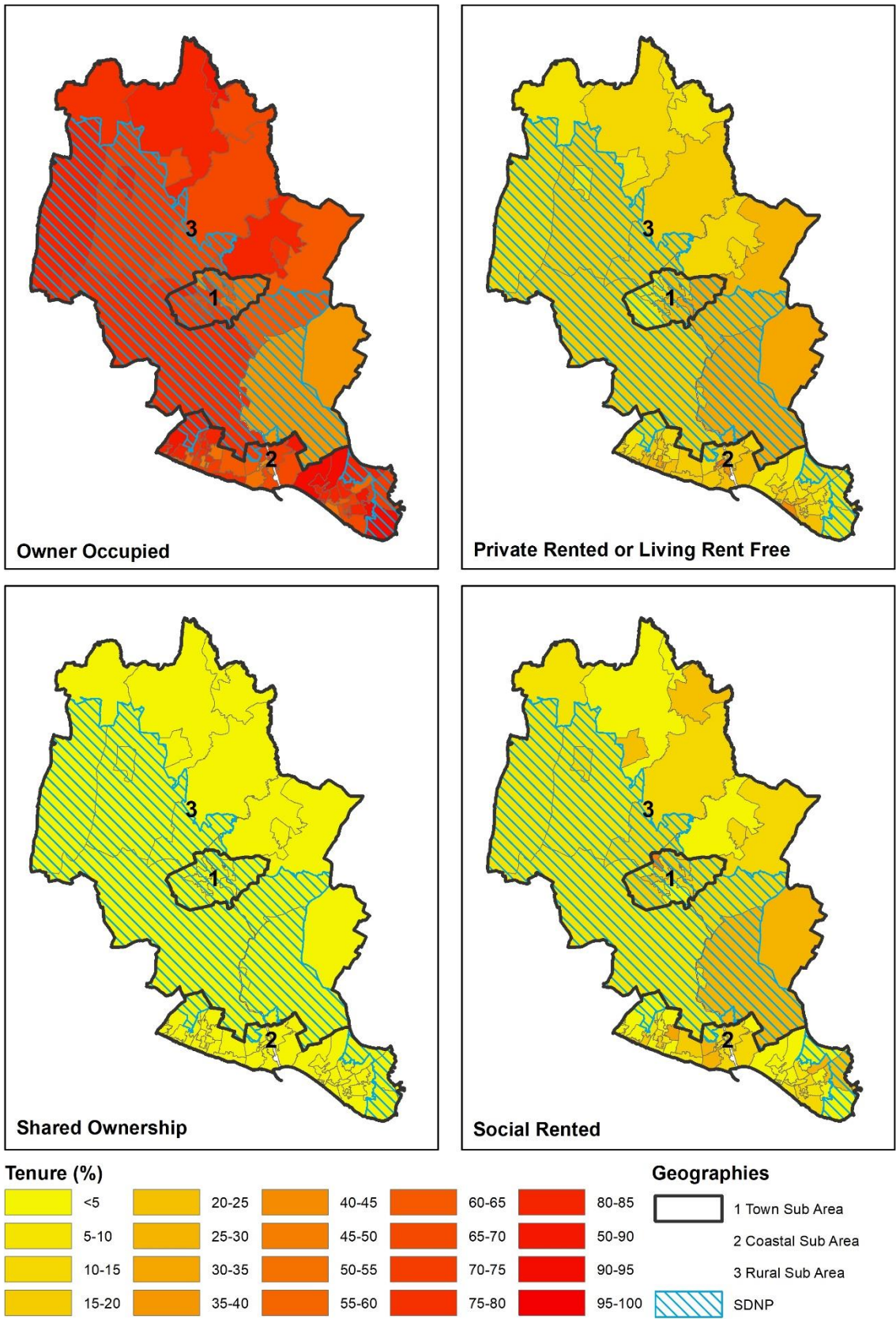
6.12 The prevalence and location of owner occupier households can be attributed to factors such as the local character, dwelling types, and affordability. The Rural Sub-Area and Coastal Sub-Area contain larger dwellings and lend themselves towards home ownership. Lewes Town Sub-Area accommodates a greater proportion of rented households, particularly social rented households. This is expected, given the more urbanised location (where affordable housing has typically been provided in the past) and the greater proportion of smaller and higher density dwelling types which are often more suitable for renting. Map 6-1 overleaf presents this data visually.

**Table 6-1: Tenure across Lewes and comparison geographies, 2021**

Tenure (2021)	Lewes District	Greater Brighton HMA	Greater Brighton & Coastal West Sussex SPBA	South East	England
<b><i>Owned</i></b>	<b>71.7%</b>	<b>63.1%</b>	<b>64.8%</b>	<b>65.7%</b>	<b>61.3%</b>
Owned: Owned outright	42.4%	33.2%	36.1%	34.3%	32.5%
Owned: Owned with a mortgage or loan	28.7%	29.9%	28.6%	31.4%	28.8%
<b><i>Shared ownership (part owned and part rented)</i></b>	<b>0.9%</b>	<b>0.9%</b>	<b>1.0%</b>	<b>1.4%</b>	<b>1.0%</b>
<b><i>Social rented</i></b>	<b>10.9%</b>	<b>12.4%</b>	<b>12.2%</b>	<b>13.6%</b>	<b>17.1%</b>
Social rented: Rented from council (Local Authority)	7.2%	6.1%	5.3%	5.3%	8.3%
Social rented: Other	3.7%	6.3%	6.9%	8.4%	8.8%
<b><i>Private rented</i></b>	<b>16.9%</b>	<b>23.5%</b>	<b>21.9%</b>	<b>19.2%</b>	<b>20.5%</b>
Private rented: Private landlord or letting agency	14.9%	21.5%	19.8%	16.9%	18.2%
Private rented: Other	2.0%	2.0%	2.1%	2.3%	2.2%
Living rent free	0.1%	0.1%	0.1%	0.1%	0.1%

Source: Census 2021

**Map 6-1: Tenure in Lewes District and sub-areas, 2021**



Source: AECOM using Census 2021 data



**Table 6-2: Tenure across district comparison geographies, 2021**

<b>Tenure (2021)</b>	<b>Lewes District</b>	<b>Lewes inside SDNP</b>	<b>Lewes outside SDNP</b>	<b>Coastal Sub-Area</b>	<b>Town Sub-Area</b>	<b>Rural Sub-Area</b>
<b><i>Owned</i></b>	<b>71.7%</b>	<b>69.6%</b>	<b>71.7%</b>	<b>71.9%</b>	<b>65.3%</b>	<b>73.6%</b>
Owned: Owned outright	42.4%	42.5%	42.4%	43.1%	39.0%	43.1%
Owned: Owned with a mortgage or loan	28.7%	27.1%	29.3%	28.7%	26.3%	30.5%
<b><i>Shared ownership (part owned and part rented)</i></b>	<b>0.9%</b>	<b>0.6%</b>	<b>1.1%</b>	<b>0.9%</b>	<b>0.5%</b>	<b>1.4%</b>
<b><i>Social rented</i></b>	<b>10.9%</b>	<b>12.6%</b>	<b>10.3%</b>	<b>9.4%</b>	<b>16.3%</b>	<b>11.0%</b>
Social rented: Rented from council (Local Authority)	7.2%	9.8%	6.3%	6.0%	12.7%	6.4%
Social rented: Other	3.7%	2.8%	4.0%	3.4%	3.5%	4.5%
<b><i>Private rented</i></b>	<b>16.9%</b>	<b>17.1%</b>	<b>16.8%</b>	<b>17.7%</b>	<b>17.8%</b>	<b>14.0%</b>
Private rented: Private landlord or letting agency	14.9%	14.6%	15.0%	16.0%	15.7%	11.5%
Private rented: Other	2.0%	2.4%	1.8%	1.7%	2.1%	2.5%
Living rent free	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%

Source: Census 2021

6.13 Tables 6-3 identifies the changes in tenure of households in Lewes district, the wider comparison geographies, and the different sub-areas, between 2011 and 2021. The tenure type of households is expressed as a percentage, which indicates the change in proportion of the total households for a given geography.

6.14 In Lewes district there has been very little change in owned tenures (+1.4%), which is consistent with the comparison geographies, with the greatest change in the larger geographies a growth of 4.0% across the South East. There were varying changes in the owner occupied tenure across the Sub-Areas of Lewes district, with the Rural Sub-Area experiencing 7.1% growth, whilst the Coastal Sub-Area remained unchanged, and the Town Sub-Area experienced a decline of 1.1% in home ownership.

6.15 The rental sector has grown significantly between 2011 and 2021. Lewes district experienced 42.2% growth in the private rental sector, greater than for the immediate comparison geographies of the Greater Brighton HMA (+16.6%) and Greater Brighton and Coastal West Sussex SPBA (+19.7%). However, the private

rented sector growth in Lewes was less than that experienced in the South East (+26.3%) and England (29.0%). The social rented sector grew less than across Greater Brighton and Coastal West Sussex SPBA (+4.9%) but at a greater rate than Greater Brighton HMA (+2.2%).

6.16 The growth in the private rented sector, although experienced across Lewes district, was most prevalent in the areas outside the SDNP (+23.8%) compared to inside the SDNP (+13.5%). The Coastal Sub-Area experienced the greatest growth in the private rented sector (+24.4%) and social rented sector (+9.4%). Lewes inside the SDNP and the Town Sub-Area were the only geographies to experience a decline in the social rented sector, at -5.3% and -6.7% respectively.

6.17 The increases noted in the rented sector largely reflect declining affordability of home ownership, as more households are forced to rent for longer periods, when in previous decades they may have been more likely able to afford to buy. It also reflects the emergence of the buy to let sector in the 2000s and other mechanisms of institutional investment in the housing market.

**Table 6-3: Change in tenure across regional comparison geographies, 2011 to 2021**

Tenure (2011 - 2021)	Lewes District	Greater Brighton HMA	Greater Brighton & Coastal West Sussex SPBA	South East	England
<b>Owned</b>	<b>+1.4%</b>	<b>+1.2%</b>	<b>+2.4%</b>	<b>+4.0%</b>	<b>+2.8%</b>
Owned: Owned outright	+10.3%	+10.0%	+10.9%	+13.0%	+13.0%
Owned: Owned with a mortgage or loan	-9.4%	-7.0%	-6.5%	-4.3%	-6.7%
<b>Shared ownership (part owned and part rented)</b>	<b>+43.9%</b>	<b>+20.4%</b>	<b>+31.4%</b>	<b>+38.5%</b>	<b>+35.8%</b>
<b>Social rented</b>	<b>+3.6%</b>	<b>+2.2%</b>	<b>+4.9%</b>	<b>+6.5%</b>	<b>+2.6%</b>
Social rented: Rented from council (Local Authority)	-1.1%	-1.9%	-1.8%	-2.9%	-6.5%
Social rented: Other	+14.1%	+6.5%	+10.6%	+13.5%	+13.0%
<b>Private rented</b>	<b>+20.9%</b>	<b>+16.6%</b>	<b>+19.7%</b>	<b>+26.3%</b>	<b>+29.0%</b>
Private rented: Private landlord or letting agency	+17.4%	+14.4%	+16.9%	+23.7%	+25.6%
Private rented: Other	+56.1%	+48.5%	+55.2%	+50.1%	+65.9%

Source: Census 2021, 2011

6.18 The declining affordability of home ownership is also demonstrated by the significant increases in shared ownership across the majority of the geographies. The greatest growth in the larger geographies was in Lewes district (+43.9%), followed by the South East (+38.5%). When looking at the areas within Lewes district, growth in this

category was significantly higher outside the SDNP (+56.2%) than inside the SDNP (+4.4%). The Rural Sub-Area had by far the greatest growth, with the number of households living in shared ownership dwellings doubling between 2011 and 2021. The only decline in this category was noted in the Town Sub-Area (-7.1%).

**Table 6-4: Change in tenure across district comparison geographies, 2011 to 2021**

Tenure (2011 - 2021)	Lewes District	Lewes inside SDNP	Lewes outside SDNP	Coastal Sub-Area	Town Sub-Area	Rural Sub-Area
<b>Owned</b>	<b>+1.4%</b>	<b>+0.1%</b>	<b>+1.8%</b>	<b>+0.0%</b>	<b>-1.1%</b>	<b>+7.1%</b>
Owned: Owned outright	+10.3%	+9.9%	+10.4%	+9.5%	+10.9%	+12.0%
Owned: Owned with a mortgage or loan	-9.4%	-12.2%	-8.4%	-11.6%	-14.7%	+0.9%
<b>Shared ownership (part owned and part rented)</b>	<b>+43.9%</b>	<b>+4.4%</b>	<b>+56.2%</b>	<b>+33.3%</b>	<b>-7.1%</b>	<b>+100.0%</b>
<b>Social rented</b>	<b>+3.6%</b>	<b>-5.3%</b>	<b>+8.0%</b>	<b>+9.4%</b>	<b>-6.7%</b>	<b>+3.8%</b>
Social rented: Rented from council (Local Authority)	-1.1%	-11.0%	+5.4%	+9.6%	-13.1%	-4.4%
Social rented: Other	+14.1%	+21.2%	+12.4%	+9.2%	+26.6%	+18.1%
<b>Private rented</b>	<b>+20.9%</b>	<b>+13.5%</b>	<b>+23.8%</b>	<b>+24.4%</b>	<b>+14.4%</b>	<b>+16.1%</b>
Private rented: Private landlord or letting agency	+17.4%	+7.8%	+21.2%	+22.1%	+10.3%	+9.1%
Private rented: Other	+56.1%	+66.3%	+51.6%	+50.5%	+58.0%	+64.7%

Source: Census 2021, 2011

6.19 Net completions data provides further insight into how tenure has changed over the last 10-year period. Table 6-5 identifies the net dwelling completions, including net affordable and market dwellings, from 2011-12 to 2021-22. Note that the data does not breakdown net completions within the SDNP from 2018-19 onward. Table 6-6 therefore provides a projection to estimate the net completions including within the SDNP from 2018-19 onwards. Figure 6-1 and Figure 6-2 provide a visual representation of this data and cumulative totals.

6.20 The completions of affordable dwellings (14.3%) in Lewes district over this period is limited. Since the delivery of affordable homes within Lewes district in 2014-15, there has been no apparent trend in terms of an increase or decrease in delivery over time, with the affordable delivery remaining consistent over the last three years.

**Table 6-5: Net completions by tenure, Lewes District, 2011 to 2021**

Year	Total	Affordable	Market
2011-12	247	No data	247
2012-13	219	No data	219
2013-14	113	0	113
2014-15	277	59	218
2015-16	286	22	264
2016-17	204	23	181
2017-18	341	67	274
2018-19*	281	30	251
2019-20*	242	66	176
2020-21*	272	72	200
2021-22*	318	62	256
<b>Total</b>	<b>2,800</b>	<b>401</b>	<b>2,399</b>
<b>%</b>	<b>100%</b>	<b>14.3%</b>	<b>85.6%</b>

Source: Lewes District Council \*Note that Lewes Council figures from 2018-19 onwards do not include completions within the SDNP, as Lewes Council no longer monitored completions in the SDNP from this point onwards.

**Table 6-6: Projected net completions by tenure, Lewes District, 2011 to 2021**

Year	Total	Affordable	Market
2011-12	247	No data	247
2012-13	227	No data	218
2013-14	113	0	113
2014-15	277	59	218
2015-16	286	22	264
2016-17	204	23	181
2017-18	341	67	274
2018-19	324*	36*	288*
2019-20	292*	72*	220*
2020-21	309*	77*	232*
2021-22	347*	67*	280*
<b>Total</b>	<b>2,967*</b>	<b>423*</b>	<b>2,534*</b>
<b>%</b>	<b>100%</b>	<b>14.3%</b>	<b>85.4%</b>

Source: AECOM calculations \*Projected figures based on extrapolating the average proportion of market and affordable housing to additional completions within the SDNP from 2018-19 onwards, as the data for completions within the SDNP from 2018-19 onwards is not available by tenure.

6.21 The tenure profile within Lewes district has an impact on the type of households who live within the district. Table 6-7 identifies tenure by age in Lewes district in 2011. This is expressed as a percentage of the total persons for a given age group. Table

6-8 and Table 6-9 turn this analysis around and examine which age groups are dominant across all tenures and for each tenure. Although 2021 Census data is available for both age and tenure, multivariate data is not yet available and so the 2011 Census must be relied upon here. It can be assumed that patterns of occupancy in terms of age and tenure will have remained similar over the last decade.

- 6.22 The dominant age groups across all tenures in Lewes district are those aged 35 to 49 and 50 to 64 (55.2% of total households). Whilst older age groups of 65 years and over are less prevalent, they still occupy 34.2% of households, mostly within the owner-occupied sector, followed by social rented sector. There are fewer households within the age groups of 34 and below (10.6%), which overwhelmingly occupy private and social rented households.
- 6.23 As Table 6-7 shows, in Lewes district, the rate of home ownership increases steadily between the ages 25 and 49, before plateauing at the highest rate of home ownership (80.3% to 83.5%) at the age groups of 50 and over. Table 6-8 and Table 6-9 identify that the 50 to 64 year age group is the turning point, at which the proportion of owned households is consistently greater than rented households. Conversely, the proportion of private rented households gradually decreases with age. Below the age of 50, the proportion of rented households is greater than those owned.
- 6.24 The range of both private rented and owned households varies significantly across the age groups (50% to 64%), which may signify households moving from private renting to home ownership with age, and older residents (50+ years) moving to owner occupied households within Lewes.
- 6.25 Looking at the social rented sector, the proportion of social rented households decreases with age. 24.6% of the youngest age group live in this tenure. This then decreases to 10.4% by the age of 35 to 49 years, and thereafter plateaus (at 9.1% to 12.4%). The proportion of social rented households does not vary as significantly across age groups as private rented and owned households. This is particularly notable above the age of 25. This is reflective of the fact that households of all age groups may need (and are entitled to) social rented housing and that many of the social rented dwellings are likely to have been occupied long-term, especially by older households.

**Table 6-7: Age by Tenure, Lewes, 2011**

<b>Tenure 2011 (Lewes)</b>	<b>24 and under</b>	<b>25 to 34</b>	<b>35 to 49</b>	<b>50 to 64</b>	<b>65 to 74</b>	<b>75 to 84</b>	<b>85+</b>
<b><i>Owned or shared ownership: Total</i></b>	<b>18.7%</b>	<b>42.6%</b>	<b>67.5%</b>	<b>80.3%</b>	<b>82.7%</b>	<b>83.5%</b>	<b>80.7%</b>
Owned: Owned outright	5.4%	4.3%	10.1%	38.9%	71.3%	77.0%	75.6%
Owned: Owned with a mortgage or loan or shared ownership	13.4%	38.3%	57.4%	41.4%	11.4%	6.5%	5.1%
<b><i>Social rented: Total</i></b>	<b>24.6%</b>	<b>15.0%</b>	<b>10.4%</b>	<b>9.1%</b>	<b>10.8%</b>	<b>10.9%</b>	<b>12.4%</b>
<b><i>Private rented or living rent free: Total</i></b>	<b>53.6%</b>	<b>41.4%</b>	<b>21.0%</b>	<b>9.7%</b>	<b>5.5%</b>	<b>3.8%</b>	<b>3.9%</b>
Private rented: Private landlord or letting agency	50.6%	40.3%	19.9%	8.8%	4.6%	2.0%	0.8%
Private rented: Other private rented or living rent free	3.0%	1.1%	1.1%	1.0%	0.9%	1.8%	3.1%

Source: Census 2011

- 6.26 The English Housing Survey 2018-19 confirms the tendency for younger age groups to rent, with 67% of households in the private rented sector having an HRP age of under 45 years. In addition, it also shows that the increase in proportion of outright owners is partially explained by population ageing, with large numbers of 'baby boomers' recently reaching retirement age and paying off their mortgages.
- 6.27 The survey confirms the overrepresentation of under 35's in the private rented sector. In 2013-14, 48% of those aged 25-34 lived in this type of tenure. However, since then, there has been a decrease to 41% in 2018. This may indicate that some of the affordable routes to home ownership driven by the government in these years have had the intended impact of increasing home ownership for these age groups (to some degree). Owner occupiers in this group have increased from 36% in 2013-14 to 41% in 2018-19.
- 6.28 In 2018-19, 68% of first-time buyers outside of London have an average age of 32, paid a deposit of less than 20% and a small proportion (6%) bought their first home outright. In addition to this, almost half (45%) had a mortgage with a repayment period of over 30 years.

**Table 6-8: Tenure by Age, Lewes District, 2011**

Age of HRP 2011	All Tenures	Owned	Social Rented	Private Rented
Total	42,180	30,933	4,608	6,639
Age of HRP 24 & under	763	143	188	432
Age of HRP 25 to 34	3,717	1,583	556	1,578
Age of HRP 35 to 49	10,964	7,402	1,144	2,418
Age of HRP 50 to 64	12,307	9,877	1,118	1,312
Age of HRP 65 to 74	6,488	5,368	701	419
Age of HRP 75 to 84	5,417	4,523	589	305
Aged of HRP 85+	2,524	2,037	312	175

Source: Census 2011

**Table 6-9: Tenure by Age, Percentage, Lewes, 2011**

Age of HRP 2011	All Tenures	Owned	Social Rented	Private Rented
Age of HRP 24 & under	1.8%	0.5%	4.1%	6.5%
Age of HRP 25 to 34	8.8%	5.1%	12.1%	23.8%
Age of HRP 35 to 49	26.0%	23.9%	24.8%	36.4%
Age of HRP 50 to 64	29.2%	31.9%	24.3%	19.8%
Age of HRP 65 to 74	15.4%	17.4%	15.2%	6.3%
Age of HRP 75 to 84	12.8%	14.6%	12.8%	4.6%
Aged of HRP 85+	6.0%	6.6%	6.8%	2.6%

Source: Census 2011

6.29 Table 6-10 shows tenure change by age in Lewes between 2001 and 2011. This shows a very clear reduction in homeownership in the two younger age groups aged 16 to 24, and in those aged over 65. Homeownership has slightly increased in the 35 to 64 age group. In addition, there has been significant increase in private rented tenure across the three youngest age groups (aged 16 to 64). The private rented sector is becoming increasingly important to older households as they rent for longer or spend their whole lives in the sector.

**Table 6-10: Tenure Change by Age, Lewes District, 2001-2011**

Tenure	16-24	25-34	35-64	65-74
Owned	-25.5%	-38.6%	+6.0%	-22.4%
Social rented	+3.9%	-1.9%	+30.4%	-20.5%
Private rented	+27.1%	+61.5%	+89.3%	-8.7%

Source: Census 2001, 2011

6.30 Table 6-11 shows the tenure by number of bedrooms in Lewes district in 2011. As above, multivariate data is not yet available with the 2021 Census and so 2011 Census data is relied upon when comparing tenure and number of bedrooms. The



tenure by number of bedrooms is expressed as a percentage of the total households.

- 6.31 Large owner occupier dwellings are most prevalent in Lewes district with a significantly greater proportion of 2-, 3- and 4-bedroom owner occupier dwellings. Both social and private rented dwellings are not as prevalent, and are weighted towards smaller dwellings containing 1-, 2- or 3-bedrooms. Lewes district's social housing stock is almost exclusively made up of 1-, 2-, or 3-bedroom dwellings. This pattern is mirrored in the private rented sector, although there is a slightly greater proportion of 4-bedroom dwellings. It is worth noting that private rented dwellings are skewed more towards 2- and 3-bedroom dwellings than social housing.
- 6.32 Social rented dwellings tend to be smaller than private rented and owned dwellings. Most social rented dwellings contain 1 bedroom (4.0%), followed by 2 bedroom (3.7%) and 3 bedroom (3.0%). There are a very limited number of 4 bedroom (0.3%) or 5+ bedroom dwellings (0.1%). This may be due to the limit of benefit working age households are entitled to, which is limited according to household size and thereby the size of home they can afford to occupy. As an example, a family with two children would only usually be entitled to a 2-bedroom property. Children of the same sex are expected to share a room up to adulthood; siblings of different sex are expected to share up to the age of 10 under housing benefit rules. This means that social rented homes are usually fully occupied, and typically do not have access to spare rooms, studies etc.
- 6.33 The English Housing Survey 2018-19 shows that overcrowding is more prevalent in rented sectors than for owner occupiers; 1% of owner occupiers are overcrowded at the national level, compared to 6% of private renters and 8% of social renters. In the social rented sector overcrowding is at the highest level since 1995-96. The limited number of larger rented dwellings in Lewes district may add to this challenge locally.

**Table 6-11: Tenure by size for Lewes District, 2011**

<b>Tenure 2011 (Lewes)</b>	<b>1 bed</b>	<b>2 bed</b>	<b>3 bed</b>	<b>4 bed</b>	<b>5+ bed</b>
<b><i>Owned or shared ownership: Total</i></b>	<b>3.3%</b>	<b>20.1%</b>	<b>30.7%</b>	<b>14.4%</b>	<b>4.8%</b>
Owned: Owned outright	1.9%	12.6%	16.1%	7.0%	2.3%
Owned: Owned with a mortgage or loan or shared ownership	1.4%	7.5%	14.6%	7.4%	2.5%
<b><i>Social rented: Total</i></b>	<b>4.0%</b>	<b>3.7%</b>	<b>3.0%</b>	<b>0.3%</b>	<b>0.1%</b>
<b><i>Private rented or living rent free: Total</i></b>	<b>3.8%</b>	<b>5.9%</b>	<b>4.7%</b>	<b>1.1%</b>	<b>0.3%</b>
Private rented: Private landlord or letting agency	3.6%	5.5%	4.2%	0.9%	0.2%
Private rented: Other private rented or living rent free	0.2%	0.4%	0.5%	0.1%	0.0%

Source: Census 2011

## Type and Size

6.34 Table 6-12 shows the dwelling types across Lewes district and the comparison geographies in 2021. Table 6-13 identifies the dwelling types in Lewes and the comparison district geographies within Lewes, including the SDNP and Sub-Areas, in 2021. The dwelling type is expressed as a percentage of total households for a given geography.

6.35 Lewes district is characterised by a greater proportion of houses or bungalows, which in the Census are combined rather than separate categories, (particularly detached or semi-detached), and fewer flats, maisonettes, or apartments than the comparison geographies. The variances between Lewes district and the wider HMA are notable, most significantly the greater proportion of detached houses or bungalows (35.0%) and fewer flats, maisonettes, or apartments (18.8%) in Lewes compared to the Greater Brighton HMA (21.3% and 34.3% respectively).

6.36 The comparison geographies within Lewes district provide insight into the variation in dwelling types across the district. Notably, the Town Sub-Area contains a greater proportion of higher density typologies such as terraced housing or bungalows (34.3%) and flats, maisonettes, or apartments (24.9%) compared to the other comparison geographies. Conversely, the Rural Sub-Area contains a comparatively greater proportion of lower density housing typologies such as detached and semi-detached housing or bungalows (75.3%). The supply of dwelling types in the Coastal Sub-Area aligns more closely with Lewes district as a whole.

6.37 The variation between the proportion of dwelling types outside and inside the SDNP is limited for flat, maisonette, or apartment dwelling types, and semi-detached houses or bungalows. However, there is a significant variation between detached and terraced houses inside the SDNP (25.7% and 26.4% respectively) and outside the SDNP (38.3% and 15.2% respectively). The variation is likely to be partially influenced by the denser Town Lewes Sub-Area contained wholly inside the SDNP.

**Table 6-12: Dwelling type (measured by households) across regional comparison geographies, 2021**

<b>Dwelling Type (2021)</b>	<b>Lewes District</b>	<b>Greater Brighton HMA</b>	<b>Greater Brighton &amp; Coastal West Sussex SPBA</b>	<b>South East</b>	<b>England</b>
Whole house or bungalow: Detached	35.0%	21.3%	25.1%	28.0%	22.9%
Whole house or bungalow: Semi-detached	27.3%	25.2%	25.6%	28.4%	31.5%
Whole house or bungalow: Terraced	18.1%	18.8%	18.9%	21.3%	23.0%
In a purpose-built block of flats or tenement	14.1%	21.7%	19.6%	16.8%	17.1%
Part of a converted or shared house (including bed-sits)	2.6%	10.3%	8.0%	3.1%	3.5%
Part of another converted building, for example, former school, church, or warehouse	1.1%	1.1%	1.1%	0.8%	0.8%
In a commercial building, for example, in an office building, hotel, or over a shop	1.0%	1.3%	1.1%	0.9%	0.8%
<i>Flats Total</i>	<i>18.8%</i>	<i>34.3%</i>	<i>29.9%</i>	<i>21.6%</i>	<i>22.2%</i>
Caravan or other mobile or temporary structure	0.8%	0.3%	0.6%	0.7%	0.4%

*Source: Census 2021*

**Table 6-13: Dwelling type (by household) across district comparison geographies, 2021**

<b>Dwelling Type (2021)</b>	<b>Lewes District</b>	<b>Lewes inside SDNP</b>	<b>Lewes outside SDNP</b>	<b>Coastal Sub-Area</b>	<b>Town Sub-Area</b>	<b>Rural Sub-Area</b>
Whole house or bungalow: Detached	35.0%	25.7%	38.3%	38.2%	12.2%	43.6%
Whole house or bungalow: Semi-detached	27.3%	28.3%	26.9%	25.3%	28.5%	31.7%
Whole house or bungalow: Terraced	18.1%	26.4%	15.2%	14.8%	34.3%	15.0%
In a purpose-built block of flats or tenement	14.1%	14.3%	14.0%	15.6%	18.1%	7.0%
Part of a converted or shared house (including bed-sits)	2.6%	2.3%	2.7%	3.0%	3.0%	1.2%
Part of another converted building, for example, former school, church, or warehouse	1.1%	1.5%	0.9%	1.0%	1.9%	0.8%
In a commercial building, for example, in an office building, hotel, or over a shop	1.0%	1.4%	0.9%	1.0%	1.9%	0.5%
<i>Flats Total</i>	<i>18.8%</i>	<i>19.4%</i>	<i>18.6%</i>	<i>20.6%</i>	<i>24.9%</i>	<i>9.4%</i>
Caravan or other mobile or temporary structure	0.8%	0.1%	1.0%	1.1%	0.1%	0.3%

*Source: Census 2021*

6.38 Although 2021 Census data is the most up-to-date data for dwelling sizes across the geographies, a clear drawback to the data is the fact that bungalows and houses are counted as one category across terraced/semi-detached/detached dwellings (mainly the latter two). To derive an idea of the proportion of bungalows in Lewes and some of the wider geographies in 2021. Valuation Office Agency (VOA) data is presented in Table 6-14 below which counts bungalows as an independent category.

6.39 The data shows that Lewes district had a significantly greater proportion of bungalows than the South East and England, at 21.3%, 9.8%, and 9.2% respectively. Comparing the VOA data to the 2021 Census data for terraced, semi-detached, and detached dwellings shows that in the Census nearly all of these were counted within the detached and semi-detached categories.

**Table 6-14: Dwelling type, 2021**

<b>Dwelling Type (2021)</b>	<b>Lewes District</b>	<b>South East</b>	<b>England</b>
Bungalow	21.3%	9.8%	9.2%
Flat	19.4%	22.7%	23.7%
Terrace	20.2%	23.9%	26.1%
Semi-detached	17.3%	21.4%	23.7%
Detached	19.5%	20.4%	15.8%

Source: VOA 2021

6.40 Tables 6-15 and 6-16 show the size of dwellings, in terms of number of bedrooms, across the comparison geographies and sub-areas in 2021. The dwelling size is expressed as a percentage of the total households for a given geography.

6.41 In Lewes district there is a high proportion of 3+ bedroom dwellings and a lower number of dwellings with both 1- and 2-bedroom dwellings relative to the immediate comparison geographies of the Greater Brighton HMA and Greater Brighton and Coastal West Sussex SPBA. The proportion of dwelling sizes in the district is relatively consistent with the other comparison geographies of the South East and England. The proportions of various dwelling sizes in Lewes are not surprising, given the dominance of larger detached and semi-detached houses and bungalows in the District. This reflects the bias in the district as a whole towards larger dwellings which are typically owner occupied.

6.42 The Sub-Areas of Lewes have relatively marked dwelling mixes, with the Rural Sub-Area containing the greater proportion of 3, and 4+ bedroom dwellings. The Coastal and Town Sub-Areas contains the greatest proportions of 1- and 2-bedroom dwellings. The size of dwellings is largely reflective of the dominant dwelling types within the Sub-Area.

**Table 6-15: Size of dwellings across regional comparison geographies, 2021**

<b>Area</b>	<b>1 bedroom</b>	<b>2 bedrooms</b>	<b>3 bedrooms</b>	<b>4+ bedrooms</b>
Lewes District	10.9%	28.5%	38.0%	22.7%
Greater Brighton HMA	17.4%	29.2%	32.7%	20.8%
Greater Brighton & Coastal West Sussex Market Area	15.4%	29.2%	34.2%	21.1%
South East	11.6%	25.9%	37.5%	25.0%
England	11.6%	27.3%	40.0%	21.1%

Source: Census 2021

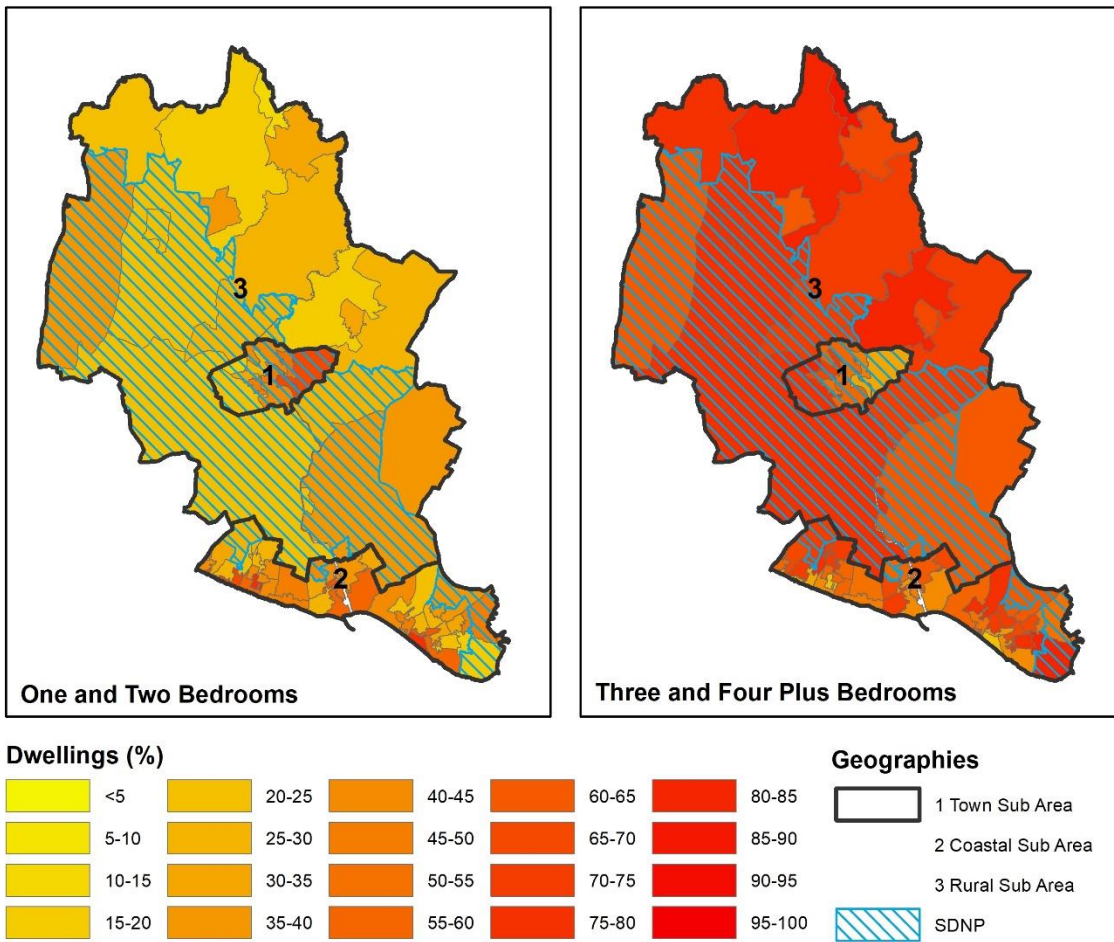
**Table 6-16: Size of dwellings across district comparison geographies, 2021**

<b>Area</b>	<b>1 bedroom</b>	<b>2 bedrooms</b>	<b>3 bedrooms</b>	<b>4+ bedrooms</b>
Lewes District	10.9%	28.5%	38.0%	22.7%
Lewes inside SDNP	10.6%	27.4%	36.4%	25.6%
Lewes outside SDNP	11.0%	28.8%	38.5%	21.7%
Coastal Sub-Area	11.9%	31.1%	38.2%	18.7%
Town Sub-Area	14.0%	28.9%	35.9%	21.2%
Rural Sub-Area	5.7%	21.1%	38.8%	34.5%

*Source: Census 2021*

6.43 Map 6-2 presents the distribution of small and larger dwellings visually, showing differences across the district's sub-areas. Both Lewes town and Coastal Lewes have areas with higher concentrations of smaller dwellings. The rural area (both inside and outside the SDNP) displays similar characteristics, with greater concentrations of larger homes.

**Map 6-2: Distribution of small (1-2 bed) and larger (3-4+ bed) dwellings in Lewes District and sub-areas, 2021**



- 6.44 To understand the changes in dwelling size over the last decade, Table 6-17 compares dwelling size for the geographies between 2011 and 2021. This exercise was not undertaken for dwelling type due to differences in the way the data was collected in 2011 and 2021. In 2011 dwelling type, the unit of measurement is dwellings, taking account of all stock, whilst in 2021 the unit of measurement is currently households. The latter therefore only shows dwelling type data of dwellings occupied by households. The datasets are therefore not directly comparable when using raw figures to track change over time.
- 6.45 Table 6-17 shows that between 2011 and 2021 there was a clear increase in 4+ bedroom dwellings (+12.5%) in Lewes, with this increase more significant outside the SDNP (+15.3%) than inside the SDNP (+6.4%). The Coastal Sub-Area had the greatest growth in this dwelling size, with the Rural Sub-Area the least. Looking at the larger geographies, Lewes experienced a smaller increase in larger dwellings than the nearby HMAs, region, and country. It should be noted that increases in dwelling size captured here may not solely be due to larger development, but also reflect increases in dwelling size through extensions (or decreases if for example two bedrooms are knocked through into one).
- 6.46 Changes in all other bedroom sizes across all of the geographies were minimal (ranging from a decline of 6.6% to an increase of 6.7%). Notably the Town Sub-Area experienced a decline in 1-bedroom dwellings of 6.6%, alongside a decline in 1-bedroom dwellings in Lewes inside the SDNP of 5.2% (with these areas overlapping significantly). Lewes as a whole experienced an increase of 1.7% in 1-bedroom dwellings. The only decline in dwelling size across the District was in 2-bedroom dwellings, with a decline of 0.7% between 2011 and 2021.

**Table 6-17: Change in size of dwellings, 2011-2021**

Area	1 bedroom	2 bedrooms	3 bedrooms	4+ bedrooms
Lewes District	+1.7%	-0.7%	+2.6%	+12.5%
Lewes inside SDNP	-5.2%	-2.7%	-1.3%	+6.4%
Lewes outside SDNP	+4.4%	+0.0%	+3.9%	+15.3%
Coastal Sub-Area	+4.4%	-1.2%	+3.1%	+15.3%
Town Sub-Area	-6.6%	-5.4%	-1.2%	+11.5%
Rural Sub-Area	+4.1%	+6.7%	+3.8%	+9.1%
Greater Brighton HMA	-2.5%	-0.4%	+1.2%	+20.9%
Greater Brighton & Coastal West Sussex Market Area	-1.2%	+1.1%	+3.7%	+19.5%
South East	+4.6%	+5.7%	+3.1%	+16.8%
England	+2.8%	+4.1%	+3.1%	+18.3%

Source: ONS 2011, ONS 2021, AECOM calculations



## Summary

- 6.47 There are a number of observations that are worth highlighting because they shed light on the nature of supply within Lewes district, how this relates to demand and the implications for future development.
- 6.48 Owner occupier households are the dominant tenure in Lewes District and occupy a significantly larger proportion of homes than in comparison geographies. Lewes district is also characterised by a greater proportion of houses or bungalows, and fewer flats, maisonettes, or apartments than the comparison geographies. The proportion of bungalows in Lewes is more than twice that of the comparison geographies. Between 2011 and 2021 there has been an increase in the number (and proportion) of households living in larger 4+ bedroom dwellings, although the size breakdown of dwellings occupied by households has not changed significantly over the last decade.
- 6.49 The Coastal, Town, and Rural Sub-Areas have a significant influence over the housing stock and supply across Lewes. The proportion of owner occupier, private rented, and social rented households varies across the sub-areas. The Rural sub-area has the greatest proportion of owner occupying households whilst the Town sub-area contains the greatest proportion of social rented households (by a significant margin), and the Coastal and Town sub-areas have the greatest proportion of private rented households. Households in the Rural sub-area tend to occupy larger dwellings (3-bedroom and 4+ bedroom) than the comparator sub-areas, more associated with home ownership. The Town Sub-Area accommodates a greater proportion of rented households, particularly social rented households, which is expected given the local character and smaller 1-bedroom dwellings in comparison with the Rural and Coastal sub-areas.
- 6.50 From the age of 25, the proportion of residents in social rented dwellings does not significantly vary, which reflects allocation of these homes in terms of needs and that many of the social rented dwellings are likely to have been occupied long-term. The 50 to 64 year age group is the turning point, at which the proportion of owned households becomes consistently greater than rented households, indicating a trend towards home ownership with increasing age.

# 7. Prices, Rents & Affordability

## Introduction

- 7.1 The relationship between the demand for homes and the supply of homes determines prices and rents and ultimately, the affordability of housing to rent or buy for individual households in Lewes. This section presents a range of data which reflects the interaction of demand and supply in Lewes district. Specifically, it focuses on the affordability of house prices and private rents in Lewes district and its sub-areas, and the extent to which local households can afford market housing and various affordable tenures.
- 7.2 There is broad academic and political consensus, since the publication of the Barker Review of Housing Supply in 2004, that the undersupply of homes in relation to need and demand is largely responsible for house price growth in recent decades that has far outstripped the growth in earnings and incomes.
- 7.3 At the national level, the Government has committed to expanding housing supply and this is underpinned by national planning policy and funding to support the delivery of housing. The Standard Method calculation of the overall need for housing in Lewes district (outside of the SDNP), calculated by the Council in 2021 and verified by AECOM, results in a needs figure of 12,040 dwellings over the Local Plan period 2020-2040 (602 homes per year multiplied by 20 years). This does not include the parts of the district that overlap with the South Downs National Park. If included, the total needs figure would be 15,640 (782 homes per annum). Section 4 explains how the housing need figure may vary depending on household projections and how the figure is apportioned within the district.
- 7.4 The Standard Method was designed to take account of demand pressures, reflected in prices and affordability, and to boost local housing supply accordingly. As such, the overall housing need figure resulting from the standard method is designed to take account of the poor affordability of housing and to uplift the housing need figure accordingly.
- 7.5 Prices and rents can also provide an indication of demand pressure on particular types of housing. They can be used to examine the affordability of homes to rent or buy, helping to inform policies around affordable housing. This section examines house prices and rents (both for private rented and for affordable rented tenures) within Lewes compared to the wider Greater Brighton HMA, the Greater Brighton & Coastal West Sussex Strategic Planning Board Area (SPBA), East Sussex, the South East, and England as a whole. These prices are then used to assess the affordability of housing to buy or rent for local people.
- 7.6 The rest of this section presents evidence on:

- House prices and how these have changed over time;
- Private rents;
- Social/ affordable rents; and
- The affordability of different tenures and products to Lewes households.

## House Prices

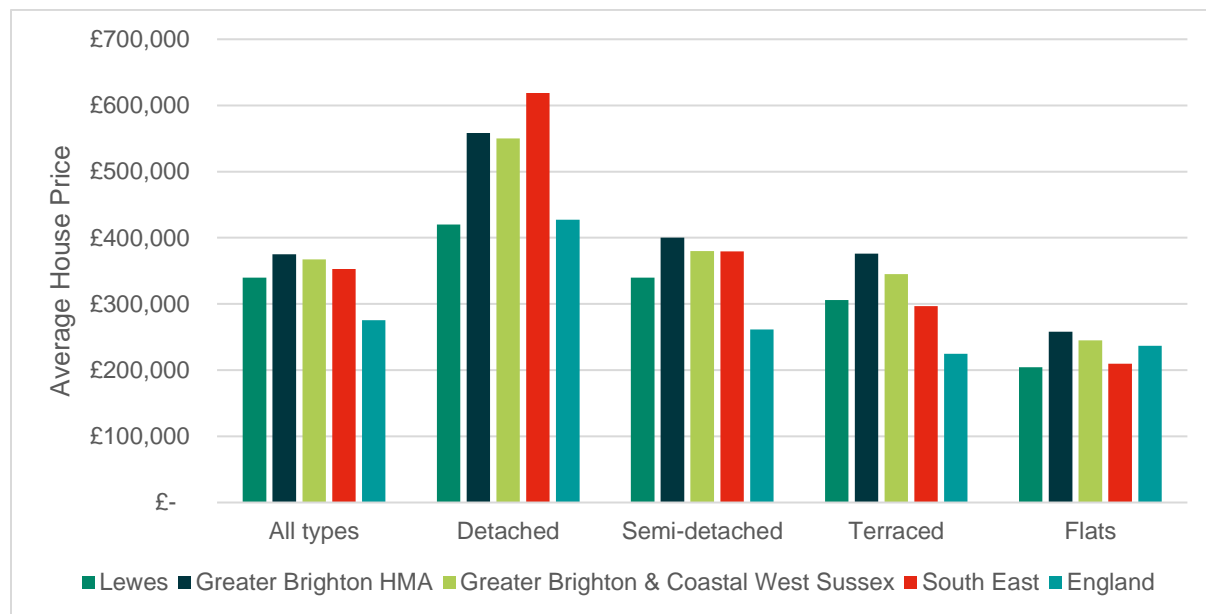
7.7 Median house prices within Lewes district, as at end 2021, are around £340,000. This is the median for all stock, both new and existing. This places Lewes district at the lower end of property values across the wider areas of which it forms a part. The 2021 median values for the HMA, SPBA, and South East are higher, at £375,000, £367,500 and £352,705 respectively. The median price in East Sussex is, however, lower than in Lewes district at £312,777. The median price in Lewes district is also substantially above the national average of £275,551. This comparative data is broken down by dwelling type in Table 7-1 and Figure 7-1.

**Table 7-1: Median House Prices by Type, 2021, Lewes and Comparison Areas**

	<b>Lewes District</b>	<b>Greater Brighton HMA</b>	<b>Greater Brighton &amp; Coastal West Sussex SPBA</b>	<b>East Sussex</b>	<b>South East</b>	<b>England</b>
<b>Detached</b>	£420,000	£558,500	£550,000	£523,491	£618,732	£427,503
<b>Semi-Detached</b>	£340,000	£400,000	£380,000	£340,551	£379,374	£261,355
<b>Terraced</b>	£305,750	£376,100	£345,000	£274,232	£296,581	£224,933
<b>Flats</b>	£204,250	£258,000	£245,000	£180,334	£209,630	£236,825
<b>All Types</b>	£340,000	£375,000	£367,500	£312,777	£352,705	£275,551

*Source: Land Registry Price Paid Data, UK HPI*

**Figure 7-1: Median House Prices by Type, 2021, Lewes District and Comparison Areas**



Source: Land Registry Price Paid Data, UK HPI

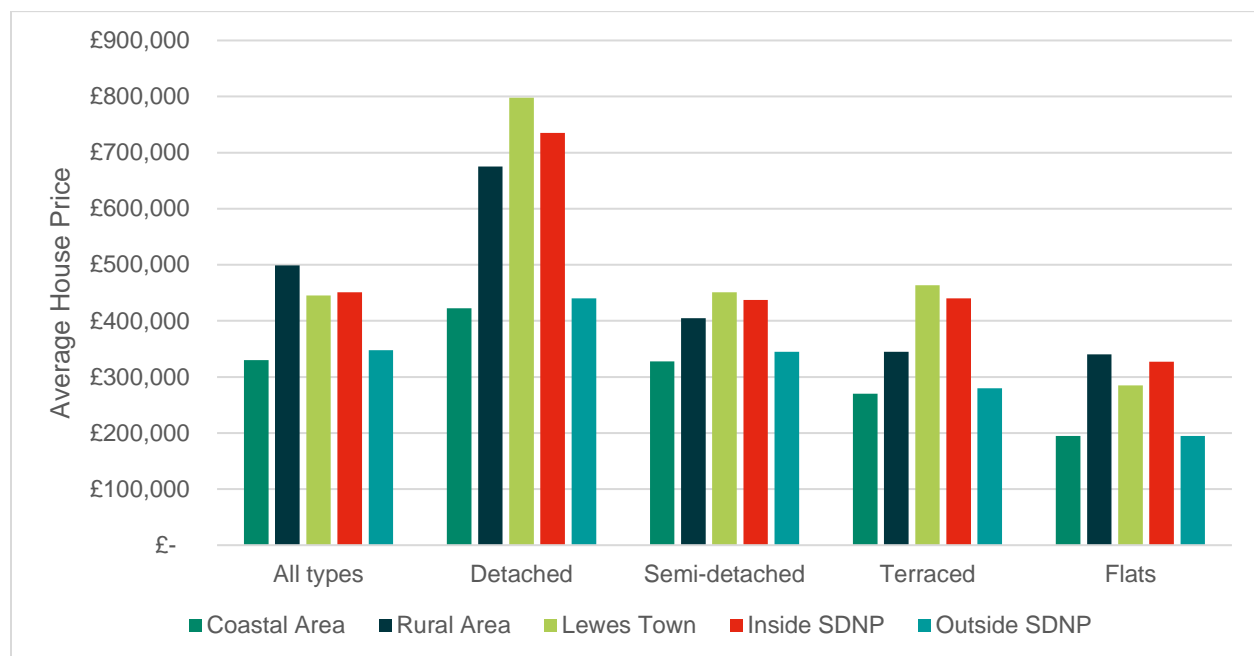
7.8 House prices vary significantly within the district. The median 2021 price varies from £330,000 in the Coastal Area to in £445,000 in Lewes Town and £498,975 in the Rural Area. Following a similar pattern, with more rural areas tending to have higher prices due to the mix of types that predominate, the area inside of the SDNP has a median price of £451,000 compared with £347,500 outside of the SDNP. To account for variance in the mix of types in each location, the overall median is broken down by type in Table 7-2 and Figure 7-2 below. When compared on a like for like basis, it is clear that values within Lewes Town are the highest in the district. Values by type remain higher inside of the SDNP than outside of it.

**Table 7-2: Median House Prices by Type, 2021, Sub Areas**

	Lewes Town	Coastal Area	Rural Area	Inside SDNP	Outside SDNP	Lewes Overall
<b>Detached</b>	£798,000	£422,250	£675,000	£735,000	£440,000	£420,000
<b>Semi-Detached</b>	£451,000	£327,500	£405,000	£437,000	£345,000	£340,000
<b>Terraced</b>	£463,500	£270,000	£345,000	£440,000	£280,000	£305,750
<b>Flats</b>	£285,000	£195,000	£340,000	£327,000	£195,000	£204,250
<b>All Types</b>	£445,000	£330,000	£498,975	£451,000	£347,500	£340,000

Source: Land Registry Price Paid Data, UK HPI

**Figure 7-2: Median House Prices by Type, 2021, Sub Areas**



Source: Land Registry Price Paid Data, UK HPI

7.9 Between 2012 and 2021, median prices have increased relatively evenly across Lewes and the various comparison geographies considered, although the rate of growth is highest in Lewes district. Lewes house prices increased by 63.5%, compared to 60.6% in the HMA, 57.0% in the SPBA, 59.7% in East Sussex, 57.1% in the South East and 54.4% across England. Therefore, it can be summarised, that while home values in Lewes district remain slightly below wider averages, they are increasing at a slightly faster rate, indicating higher demand pressures within the district. The 10-year growth rates for the various geographies are presented in Table 7-3.

**Table 7-3: Median House Price Change by Type, 2012-2021, Lewes District and Comparison Areas**

	Lewes District	Greater Brighton HMA	Greater Brighton & Coastal West Sussex SPBA	East Sussex	South East	England
<b>Detached</b>	69.4%	61.9%	61.8%	62.0%	60.6%	57.1%
<b>Semi-Detached</b>	61.9%	62.6%	58.4%	63.5%	61.7%	56.3%
<b>Terraced</b>	62.4%	62.1%	54.7%	64.4%	58.5%	54.6%
<b>Flats</b>	73.5%	51.8%	48.5%	49.6%	43.9%	48.7%
<b>All Types</b>	63.5%	60.6%	57.0%	59.7%	57.1%	54.4%

Source: Land Registry Price Paid Data, UK HPI

7.10 This analysis is again repeated for the district's sub-areas in Table 7-4. Price appreciation is very consistent between Lewes Town, the Coastal Area, and the area outside of the SDNP, all of which are close to the overall average growth for Lewes district. Rates of price growth are lower in the Rural Area and the SDNP (which overlap to a significant degree). The average growth rate in some categories, such as flats in the Rural Area, is affected by smaller sample sizes. It is worth observing that the overall growth rate for Lewes can exceed the rates in all the district's constituent parts, because the highest and lowest transactions in all areas in the starting and finishing year are pooled together.

**Table 7-4: Median House Price Change by Type, 2021, Sub Areas**

	Lewes Town	Coastal Area	Rural Area	Inside SDNP	Outside SDNP	Lewes District Overall
<b>Detached</b>	42.2%	68.9%	47.1%	31.0%	63.0%	69.4%
<b>Semi-Detached</b>	37.7%	67.1%	47.3%	34.5%	64.3%	61.9%
<b>Terraced</b>	71.7%	54.3%	42.3%	69.2%	53.2%	62.4%
<b>Flats</b>	58.3%	57.9%	15.3%	34.8%	57.3%	73.5%
<b>All Types</b>	61.8%	61.8%	51.2%	52.9%	61.6%	63.5%

*Source: Land Registry Price Paid Data, UK HPI*

7.11 Table 7-5 sets out the lower quartile property price alongside the mean and median property prices for Lewes for each year between 2012 and 2021. Lower quartile prices give an indication of the cost entry-level housing, typically smaller homes such as flats or terraces that may not be suitable for all households but may be well-suited to first time buyers.

7.12 Lower quartile prices in Lewes follow broadly the same trend as the median, increasing by 58.7% between 2012 and 2021. This is again a slightly steeper rate of increase than wider averages: lower quartile prices increased by 57.3% across the HMA and by 55.8% across the SPBA over the same period.

7.13 The difficulty with relying on average prices, or even lower quartile prices, is that these are affected by the mix of homes sold in an area. For example, the median price of flats within Lewes district is lower than the lower quartile average, with current flat prices being around £204,000 compared to the lower quartile price of £265,000. This is to be expected when a comparatively small proportion of the stock takes the form of flats (19% compared with 35% across the HMA). This means that they have a lower impact on the lower quartile house price than they might in other areas. The median dwelling price by type and year for Lewes district is shown in Table 7-6.

**Table 7-5: House Prices, Lewes District, 2012-2021**

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	% Change	Absolute Change
<b>Mean</b>	£209,180	£219,003	£245,967	£268,222	£287,587	£290,801	£299,627	£309,926	£319,781	£354,071	69.3%	£132,000
<b>Median</b>	£208,000	£212,500	£235,000	£259,175	£275,000	£280,500	£290,000	£295,000	£305,000	£340,000	63.5%	£132,000
<b>Lower Quartile</b>	£167,000	£172,500	£187,250	£196,000	£221,000	£228,250	£236,000	£244,500	£240,250	£265,000	58.7%	£98,000

Source: Land Registry Price Paid Data

**Table 7-6: Median House Prices by Type, Lewes District, 2012-2021**

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	% Change	Absolute Change
<b>Detached</b>	£248,000	£250,000	£296,500	£320,000	£338,000	£350,000	£350,000	£355,000	£377,500	£420,000	69.4%	£172,000
<b>Semi- Detached</b>	£209,975	£218,000	£240,000	£265,000	£278,500	£289,000	£299,999	£310,000	£325,000	£340,000	61.9%	£130,025
<b>Terraced</b>	£188,250	£197,000	£220,000	£245,000	£264,950	£273,000	£280,000	£271,000	£278,500	£305,750	62.4%	£117,500
<b>Flats</b>	£117,750	£125,000	£156,600	£155,000	£165,000	£175,000	£185,000	£186,250	£187,950	£204,250	73.5%	£86,500
<b>All Types</b>	£208,000	£212,500	£235,000	£259,175	£275,000	£280,500	£290,000	£295,000	£305,000	£340,000	63.5%	£132,000

Source: Land Registry Price Paid Data

7.14 It is important to consider the price of new build homes because they best represent the cost of housing that will be built in the near future, and over which planning policy has most influence.

7.15 The price of new build homes is generally higher than the price of homes in the existing housing stock. The Barker Review of Housing Supply<sup>44</sup> in 2003/04 examined the reasoning for this, concluding that the premium on new build homes was partly a factor of location, with new developments generally delivered in places people want to live. The new build premium is also in part due to new homes providing brand new fixtures and fittings, including kitchens and bathrooms, as buyers are willing to pay more for these features. Less is known about the willingness of buyers to pay more for homes which have improved energy efficiency (as most new homes do), and which have improved adaptability (e.g. built to M4(2) or M4(3) standards). These features clearly add significant value to some new homes, whether this is priced in or not. The factor of energy efficiency may also increase in importance to buyers, as the cost of living crisis worsens and fuel prices rise at the time of writing.

7.16 In Lewes district, there were 967 new build transactions between 2012 and 2021 in total. The annual average is therefore 97, ranging from 55 in 2012 to 142 in 2019.

7.17 Table 7-7 shows median new build house prices based on transactions in 2020 and 2021 (to obtain a more robust sample) compared to overall house prices in the same period. This includes both new and existing properties. It shows that new build house prices are around 11.1% higher than house prices overall. The greatest difference is in the value of flats. The apparent new build premium of 30.5% for this type may be due to the age or condition of existing flats or the quality, size, and location of the new units delivered. The new build premium for the other property types is more moderate and generally close to the overall average premium of 11.1%.

**Table 7-7: New Build House Prices, Lewes District, 2020/2021**

	<b>New Build Median</b>	<b>Overall Median</b>	<b>Difference</b>	<b>% Growth</b>
Detached	£487,473	£440,000	£47,473	9.7%
Semi-Detached	£375,000	£340,000	£35,000	9.3%
Terraced	£364,995	£310,000	£54,995	15.1%
Flats	£294,950	£205,000	£89,950	30.5%
Overall	£393,495	£350,000	£43,495	11.1%

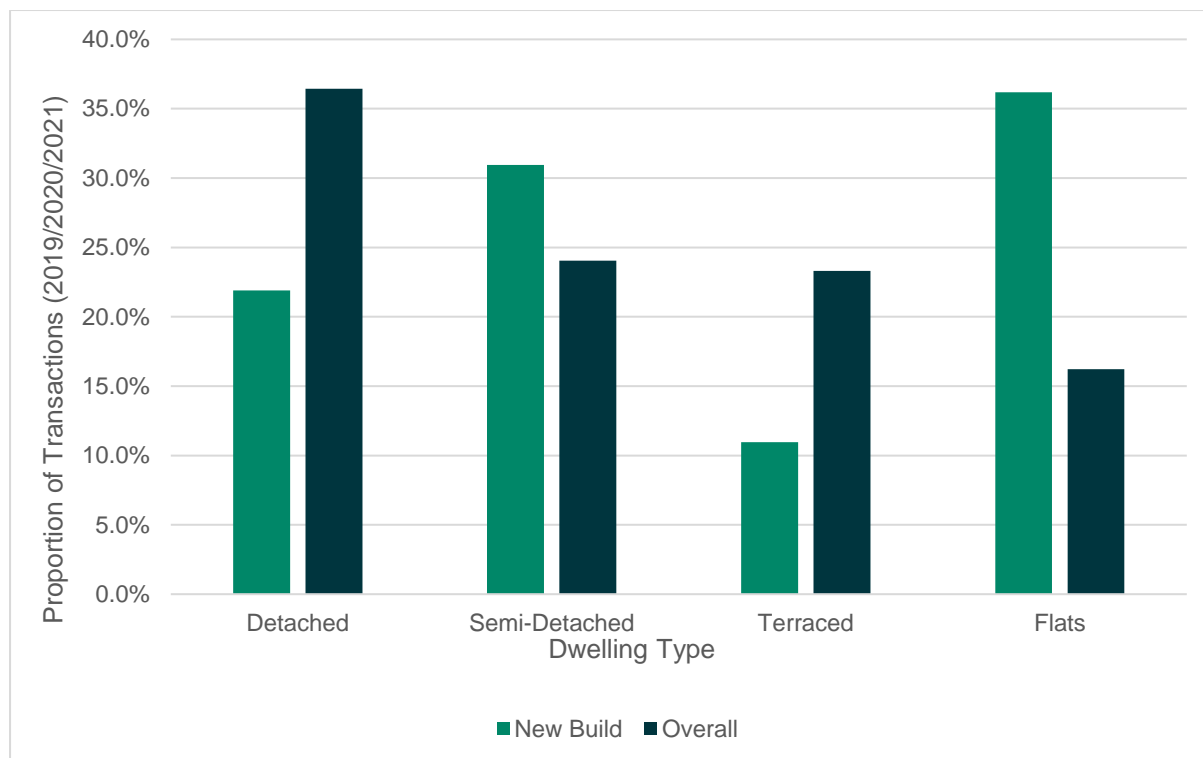
Source: Land Registry, AECOM Calculations

<sup>44</sup> [Barker Review of Land Use Planning: final report recommendations - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/362222/barker-review-land-use-planning-final-report-recommendations.pdf)



7.18 Figure 7-3 shows the proportion of transactions by dwelling type for new build and all sales. Interestingly, flats were the most common form of new housing while being the least common form of housing sold overall.

**Figure 7-3: Proportions of Transactions by Dwelling Type, Lewes District, 2020/2021**



Source: Land Registry

7.19 Although new build prices are generally found to be higher, they are also more volatile than overall house prices. They can be more responsive to a housing market downturn, with new build prices often falling more rapidly in these circumstances. The price premium is then effectively reversed so that homes in the existing stock can be higher priced than new build properties. This is because developers often need to cut prices substantially or offer incentives to ensure sales and cashflow. Unlike properties in the existing stock, new build homes do not contain owners who may be willing to ‘sit out’ a downturn. Therefore, price falls in the new build homes are realised, whereas price falls of homes in the existing stock may not be realised as homeowners wait for an improving market. The result for the existing market is large falls in the number of transactions rather than in prices.

7.20 Transactions or sales fell dramatically across England following the credit crunch and housing market downturn from 2008, falling by more than half in many locations. The implication for Lewes district is that, in a housing market downturn, sales rates can fall dramatically and take some time to recover. Transactions have broadly recovered since the downturn but there has been some volatility in recent years due to uncertainty over Brexit and the Covid-19 pandemic.

7.21 During the pandemic the UK Government imposed a ‘Stamp Duty Holiday’ between 8<sup>th</sup> July 2020 and 30<sup>th</sup> September 2021. The amount of Stamp Duty Land Tax (SDLT) payable on residential property from 8<sup>th</sup> June 2020 to 30<sup>th</sup> June 2021 this period was zero up to a property value of £500,000, regardless of whether the purchaser was a first-time buyer or not. This began to be phased out with the maximum property value for zero SDLT reduced to £250,000 between 1<sup>st</sup> July 2021 and 30<sup>th</sup> September 2021. Rates were also reduced for properties in higher value bandings in both circumstances. This caused a boom in the property market as people took advantage of the tax relief, increasing the turnover in stock. There have been a number of potential impacts in the housing market generally due to the temporary reduction in SDLT:

- Increased demand, outstripping the supply of homes, led to a sharp increase in house prices;
- Downsizers, who would ordinarily have been put off moving due to having to pay SDLT, may have taken advantage of the ‘holiday’ to move, freeing up larger properties;
- First-time buyers lost the advantage they have in the housing market due to all buyers benefitting from the stamp duty break, potentially making accessing the housing ladder in this time more challenging; and
- It is likely to have distorted sales figures and the impact may not be seen for a number of years when looking at trends in housing sales and prices.

## Private Rents

7.22 Table 7-8 and Figure 7-4 set out average private (median) rents in Lewes district by size of property between April 2021 and March 2022, compared to East Sussex, the South East, and England. Median average rents in Lewes were around £1,000 per month, and lower quartile rents were around £850 per month, both of which are higher than all of the comparison areas.

7.23 Average rents mask differences between property types and sizes. Average (median) rents in Lewes district range from £600 pcm for a studio to £1,350 pcm for a 4+ bedroom home. As well as having a greater number of bedrooms, the largest properties are likely to include other features such as large gardens, car parking, and other desirable features which attract higher rental values. Lewes district has consistently higher rents across all size categories, although the South East average exceeds that for Lewes district in a small number of cases. This pattern of higher rents in Lewes district is in contrast to the relationship of average purchase prices between the same areas, which are more mixed and less suggestive that Lewes district is a particularly high-value area.

7.24 That said, there is only a relatively slight difference between median and lower quartile rents in Lewes district. Given the lower proportion of flats in the Lewes district’s stock than wider averages, it may be that the lower quartile and median

rental property is larger or more likely to be a house than across the larger comparison areas, thereby driving up the average.

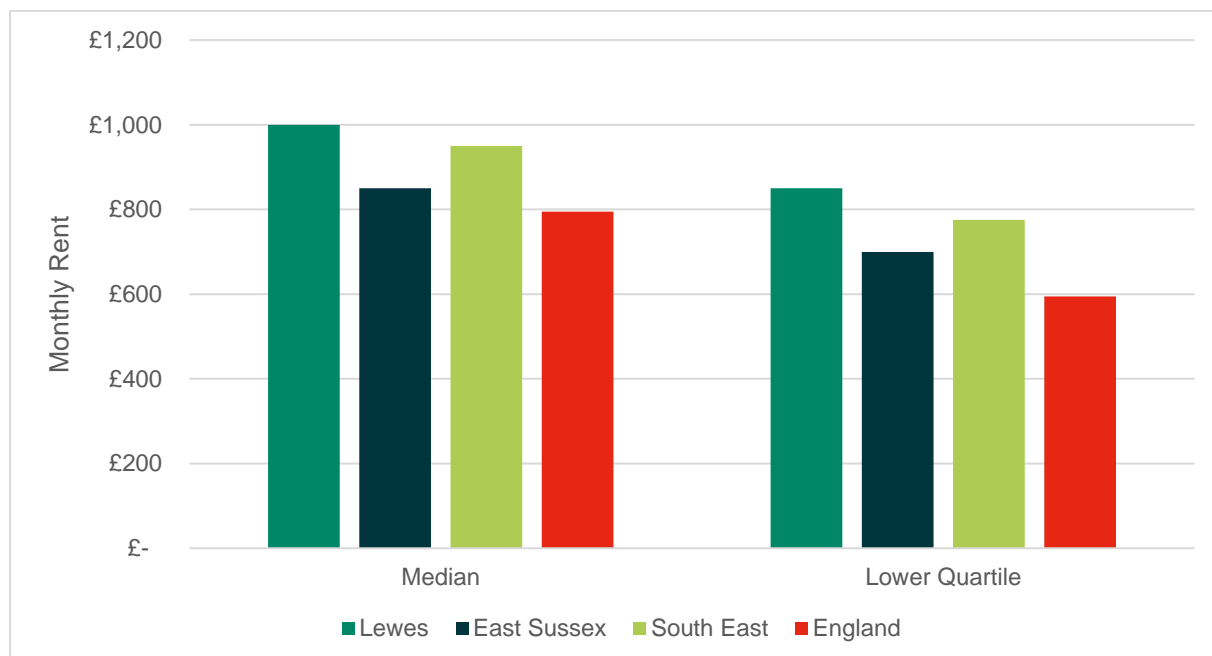
7.25 There is no data from this source for the average cost of a room in a shared house in Lewes. Given the relative similarity of Lewes and South East rental costs, room rates in the former are assumed to be the same as the latter. These are marked as estimated in the table. However, in practice there may be a very limited number of rooms available for £400 pcm because the private rented sector is small in the District as a whole.

**Table 7-8: Monthly Private Rental Price by Property Size, April 2021 – March 2022**

	Median				Lower Quartile			
	Lewes	East Sussex	South East	England	Lewes	East Sussex	South East	England
<b>Room</b>	£450 (est.)	£425	£450	£425	£400 (est.)	£390	£400	£373
<b>Studio</b>	£600	£525	£625	£615	£588	£450	£550	£480
<b>1 bed</b>	£750	£695	£775	£700	£708	£625	£675	£550
<b>2 bed</b>	£995	£850	£950	£769	£900	£770	£835	£600
<b>3 bed</b>	£1,200	£1,100	£1,200	£850	£1,100	£950	£995	£675
<b>4+ bed</b>	£1,528	£1,550	£1,733	£1,450	£1,350	£1,300	£1,400	£1,050
<b>All</b>	£1,000	£850	£950	£795	£850	£700	£775	£595

Source: Valuation Office Agency Private Rental Data (now published by ONS)

**Figure 7-4: Monthly Private Rental Price, April 2021 – March 2022**



Source: Valuation Office Agency Private Rental Data (now published by ONS)

7.26 Table 7-9 provides a comparison of median rents within Lewes's postcode Districts. Broadly speaking, BN7 represents Lewes Town and its environs; BN8 represents the wider rural area; and BN9 (Peacehaven), BN10 (Newhaven) and BN25 (Seaford) cover the coastal area. Small parts of Lewes also fall into other postcode areas, but these are more representative of other locations, notably

Brighton. This data is a snapshot of rental asking prices as at September 2022 rather than a full accounting of agreed rental prices. The sample size is relatively small, but sufficient to give a broad sense of the variation.

7.27 Rents are generally highest in BN7 around Lewes Town, which aligns with the findings on house prices earlier in this section. The picture is more mixed elsewhere: the rural area (BN8) has the next highest rents, but primarily when looking at larger property sizes, while BN10 has higher values at the smaller end of the size spectrum in accordance with Newhaven's relatively more dense housing stock.

**Table 7-9: Median monthly Private Rental Price by Property Size, Sub Areas, September 2022**

	BN7	BN8	BN9	BN10	BN25
<b>1 bedroom</b>	£1,100	£896	£800	£913	£850
<b>2 bedrooms</b>	£1,450	£1,295	£1,050	£1,225	£1,100
<b>3 bedrooms</b>	£2,175	£1,698	£1,275	£1,400	£1,450
<b>4 bedrooms</b>	£2,895	£2,000	-	£1,750	£1,750
<b>All properties</b>	£1,500	£1,350	£1,050	£1,150	£1,100
<b>Sample size</b>	18	12	10	10	24

Source: Valuation Office Agency Private Rental Data (now published by ONS)

## Affordable/Social Rents

7.28 Table 7-10 sets out the gross monthly affordable and social rents for Lewes District based on the size of dwelling. It shows that the rent for an average affordable rented dwelling is 56.6% higher than that of an average social rented dwelling.

7.29 Note that the high cost of an affordable rented bedsit relative to a 1-bedroom affordable rented home may be an anomaly in the data, which is based on a sample of only 23 such units.

**Table 7-10: Gross Monthly Affordable and Social Rent, Lewes District, 2019**

	Affordable Rent	Social Rent
Bedsit	£642.97	£327.48
1-bedroom	£550.60	£386.88
2-bedroom	£701.37	£428.46
3-bedroom	£816.08	£497.37
4+ bedroom	£1,063.09	£535.00
All stock sizes	£679.12	£433.67

Source: SDR 2019

## Affordability of Different Tenures

7.30 The relationship between prices and rents and local incomes determines how affordable homes are to households in Lewes. The rest of this section examines affordability and, specifically, whether lower quartile and average income households and individuals can afford to rent or buy in Lewes district. It then presents affordability analysis based on the existing affordable home ownership products (First Homes and shared ownership) at varying discounts/equity levels, and social/affordable rents.

### Affordability of Market Housing to Buy and Rent

7.31 Table 7-11 presents the cost of home ownership in Lewes district, the cost of renting in the open market, and the income required to buy or rent, based on a number of assumptions:

- Households have a 10% deposit. Households may be able to secure a mortgage with a smaller deposit (e.g. 5%) but would need higher incomes to access the same property, all other things being equal.
- Households can borrow 3.5 times their income when they are purchasing a home (including a share in the case of shared ownership). Some lenders may offer higher multiples (e.g. 4 or 4.5 times income). However, mortgage options narrow at these higher multiples and they will not be available to all households. Hence, AECOM use 3.5 times income as a reasonable assumption based on the common multiple available to most households.<sup>45</sup>
- Renters can spend up to one third of their gross income on their rent. It does not factor in any service charges and these can add substantial additional costs in some cases. The picture becomes more complex when benefits are factored into incomes. Benefits are not included in the incomes/earnings presented in Table 7-11. Where households claim full or partial housing benefit, applying a threshold that relates to one third of their income may not be appropriate. This is because a large portion of their income can only be spent on rent and flexes (to a limit) dependent on the rental cost.

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<sup>45</sup> In AECOM's housing need assessments (whether LHNA, neighbourhood level or site specific), we use a standard assumption that households can borrow 3.5x their income and that they have access to a 10% deposit. We have done periodic cross checking exercises by reviewing other consultants' analysis and generally they adopt similar assumptions. We also recently checked what major lenders were offering and found that 3.5x was the most robust assumption and that whilst some lenders will offer mortgages at higher multiples these are more limited in availability. This can also be checked by using the 'how much can I borrow' calculator on the Money Saving Expert website. [How much can I borrow: mortgage calculator - MoneySavingExpert](#) Their calculator is based on typical banks' lending criteria. For example, a household with an income of £50,000 (two earners on £25k each) is calculated to be able to borrow between £125,000 and £200,000 (2.5 to 4 times their income). The calculator shows that most households with this income are likely to be able to borrow up to £125,000 (the lower level of the multiplier range). There is decreasingly likelihood of being able to borrow from £125,000 upwards. How much individual households can borrow will depend on their individual circumstances but this calculator suggests that it is very unlikely overall that households will be able to borrow 4x their income. In summary, the majority of households will not be able to borrow more than 4x their income from a bank and so to assume homes are affordable on the basis of this assumption would exclude the majority of households.

Nevertheless, one third of income provides a reasonable threshold for rental affordability.

- It assumes shared owners pay a rent of 2.5% per annum of the value of the rented share of their property. The rental value may vary according to the registered provider but 2.5% is considered a typical value and is commonly used in analysing the sector.

**Table 7-11: Affordability of Different Market Products in Lewes District**

Tenure	Price	Mortgage Value	Deposit	Rent	Income required	Affordable on median household incomes? £37,793	Affordable on LQ household incomes? £21,664	Affordable on median individual earnings? £26,250	Affordable on LQ individual earnings? £17,513
<b>Market Purchase – General</b>									
Mean – all types	£354,070	£318,664	£35,407	-	£91,047	No	No	No	No
Median – all types	£340,000	£306,000	£34,000	-	£87,429	No	No	No	No
LQ – all types	£265,000	£238,500	£26,500	-	£68,143	No	No	No	No
Median detached	£420,000	£378,000	£42,000	-	£108,000	No	No	No	No
Median semi-detached	£340,000	£306,000	£34,000	-	£87,429	No	No	No	No
Median terrace	£305,750	£275,175	£30,575	-	£78,621	No	No	No	No
Median flat	£204,250	£183,825	£20,425	-	£52,521	No	No	No	No
<b>Market Purchase – New Build</b>									
Overall median	£393,495	£354,146	£39,350	-	£101,184	No	No	No	No
Median detached	£487,473	£438,726	£48,747	-	£125,350	No	No	No	No
Median semi-detached	£375,000	£337,500	£37,500	-	£96,429	No	No	No	No
Median terrace	£364,995	£328,496	£36,500	-	£93,856	No	No	No	No
Median flat	£294,950	£265,455	£29,495	-	£75,844	No	No	No	No
<b>Market Rent/ Rent to Buy</b>									
4+ bed	-	-	-	£18,336	£61,059	No	No	No	No
3-bed	-	-	-	£14,400	£47,952	No	No	No	No
2-bed	-	-	-	£11,940	£39,760	Marginal	No	No	No
1-bed	-	-	-	£9,000	£29,970	Yes	No	No	No
Studio	-	-	-	£7,200	£23,976	Yes	No	Yes	No
Room	-	-	-	£5,400	£17,982	Yes	Yes	Yes	Marginal

Source: AECOM modelling, using Land Registry Price Paid Data, ONS Private Rental Market Data, CACI Paycheck income data and ASHE earnings data. NB -household incomes and earnings do not include any benefits eg housing benefit.

- 7.32 To afford a median priced property for market purchase in Lewes district, households would need an income of around £87,429 based on the assumptions above. Households with lower incomes but higher savings or equity for a deposit may be able to afford the same property.
- 7.33 There is a large degree of variation in the income required to afford different types of market housing. Median detached properties require an income of £108,000 while flats require the lowest income of the dwelling types at £52,521.
- 7.34 New build properties are, on average, higher priced than median average properties across the stock as a whole, as established previously. Households need, on average, incomes of around £101,184 to afford a median priced new build home, but again could afford a flat with a lower income of £75,844, though this is still nearly double the average household income in the district.
- 7.35 Where households have access to a deposit that is greater than 10%, this would reduce the income requirements for purchasing. Whilst wealthier households in Lewes district are likely to have significant equity or savings, first time buyers tend to have limited deposits, and therefore face a particularly high barrier to home ownership in Lewes district.
- 7.36 Cheaper properties are available within the district, which enable some households to access home ownership. Lower quartile priced properties and existing flats have lower income thresholds, although they remain above the average income. However, smaller properties may not be suitable for all households (e.g., families with children looking to buy for the first time).
- 7.37 Median household incomes<sup>46</sup> within Lewes district are around £37,793. The affordability tables use this benchmark along with lower quartile household incomes of £21,664 to determine the tenures affordable to different local households. To take into consideration the affordability of housing to individuals, rather than households, ONS figures for median and lower quartile individual earnings<sup>47</sup> are also used (£26,250 and £17,513 respectively).
- 7.38 Table 7-11 shows that both median and lower quartile priced properties for market purchase are unaffordable to any of the benchmarked individual and household income groups. Market housing, regardless of the type of dwelling, or whether it is new build or not, is out of reach to all average income groups considered. The implication is that households need to have above average incomes, and/or, more substantial deposits, to be able to afford to buy in the district.
- 7.39 In terms of market rents, average rents for dwellings of 2-bedrooms or fewer are potentially affordable to households on median incomes. All sizes of private rented dwellings except for studios and rooms are, however, unaffordable to median individual earners. Lower quartile individual earners are not able to

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<sup>46</sup> Household incomes are derived from CACI data

<sup>47</sup> Individual earnings are derived from ASHE

access any market rents other than rooms in shared houses. This suggests that many households on lower quartile incomes and earnings will need subsidy (e.g. housing benefit) to access market housing rents. Alternatively, they may be able to access cheaper housing outside of the district, but this may involve commuting into Lewes to access work, with added transport costs. Analysis of prices and rents in the wider market area suggests that more affordable locations nearby are limited.

- 7.40 Note that the data above estimates the cost and therefore the affordability of a privately rented room in a shared house based on the South East average in the absence of Lewes-specific data, as noted in the section on rents above. In practice there may be very few rooms available at this rent.

### **Affordability of Affordable Home Ownership Products**

- 7.41 Table 7-12 estimates the cost of affordable home ownership products in Lewes district. These products have been priced in relation to median house prices, new build terraced prices, and new build flat prices. The median is used as it is not realistic to assume that affordable home ownership products will be priced at a discount to existing entry level priced properties because of the new build premium discussed earlier in the section. New build terraced prices are used as a reasonable estimate for new build entry-level house prices in Lewes district, whilst new build flat prices offer a lower-cost alternative.
- 7.42 Any product with a cost that falls below LQ (entry level) house prices has the potential to extend home ownership within Lewes district. However, unless the cost of affordable home ownership properties is substantially below the cost of buying an entry level home in the open market, it is unlikely to extend home ownership very far. Furthermore, take up is likely to be more subdued as buyers can choose between affordable and entry-level open market homes.
- 7.43 Shared ownership has been the main model of affordable home ownership in recent years, with households purchasing an equity share of a property and paying rent on the remaining portion. The only income level considered here that enables households to afford any form of shared ownership is the overall median household income. These households can afford a 10% equity share in a shared ownership property based on the overall median house price or the median price of a new terrace in Lewes district. However, to afford an equity share of 25%, only newly built flats are likely to be affordable to this group.
- 7.44 Individuals and households on lower quartile incomes are unable to access any of the shared ownership products estimated here based on Lewes district house prices.
- 7.45 In May 2021, the Government introduced a new affordable home ownership product called First Homes, targeted specifically at first time buyers. This new tenure is expected to be an important part of Government strategy for improving access to home ownership, with First Homes required to account for at least 25% of all affordable housing units delivered by developers through planning



obligations. It differs from shared ownership in that the property is fully owned by the occupant, with no rent payments. First Homes should be available to buy with a minimum discount of 30% below their full market value but this discount level can also be set higher at 40% or 50% where this can be suitably evidenced. Table 7-12 assesses the affordability of the First Homes product at all 3 discount levels to households and individuals in Lewes.

- 7.46 Table 7-12 demonstrates that when using the price benchmark of median housing in Lewes districts, even a 50% discount is not sufficient to make First Homes affordable to households on median incomes or any of the other income groups considered. The same is true when using new build terraced properties as the benchmark. Only First Homes brought forward as flats appear affordable to average earning households. Even in this case, the maximum 50% discount level is required to make First Homes (very nearly) affordable.
- 7.47 However, it is important to note that even though average and below average earners are not well served by First Homes, they do provide value to a large pool of higher earning potential buyers. Recall that the income required in Lewes is £78,621 for an existing terrace and £52,521 for an existing flat (rising to £93,856 and £75,844 for new builds). First Homes at a 50% discount bring the income required to own newly built terraces and flats down to £46,928 and £37,922 respectively. Only 14% of households in Lewes can afford the existing terrace threshold of £78,621, but 34% can afford the First Home terrace threshold of £46,921. So while average earners are likely to remain priced out, a relatively large additional segment of the population potentially gain access to home ownership. Discounts of both 30% and 40% would also extend home ownership to some households currently unable to buy, but would not be sufficient to support those on average incomes.
- 7.48 The First Homes discounted prices are all below the £250,000 cap, with the exception of new build terraces at the minimum 30% discount level. The incomes required to afford these properties are all below the cap of £80,000, above which households would not be eligible for the product.
- 7.49 Another caveat worth including here is 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. However, as an illustration, the build cost for a 2 bedroom home (assuming 70 sq. m and a build cost of £1,500 per sq. m) would be around £105,000. This cost excludes any land value or developer profit. Viability of discounted sale homes is therefore unlikely to be an issue in Lewes district but could be relevant on particular sites.
- 7.50 The Planning Practice Guidance (PPG) for First Homes<sup>48</sup> implicitly targets households with savings sufficient only for a 5% deposit mortgage and therefore reliant on 95% loan to value mortgages. Therefore, the calculations for First Homes in Table 7-12 were repeated with an assumed 5% deposit as opposed to

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<sup>48</sup> Paragraph 008 - <https://www.gov.uk/guidance/first-homes>

10% deposit. This has a slight impact on the income thresholds required for these products to be affordable, increasing the thresholds by roughly £2,000-£5,000. This means that households need *higher* incomes to access these homes where they have a lower deposit, although their access to ownership may be improved if the deposit rather than income is the main impediment.

7.51 First Homes with a 5% deposit are still unaffordable to the same groups as shown in the table for a 10% deposit. Although, new build flats at a 50% discount, labelled marginally affordable at a 10% discount, may slip out of reach for this income group.

7.52 These figures must be treated with caution as the actual prices of new build properties may vary, particularly across different types and sizes or locations within the district. Nevertheless, the Council will need to assess whether the discounts offered, and proposed sales price of affordable home ownership products, would meaningfully extend home ownership.

**Table 7-12: Affordability of Affordable Home Ownership Products in Lewes**

Tenure	Price	Mortgage Value	Deposit	Rent	Income required	Affordable on median household incomes? £37,793	Affordable on LQ household incomes? £21,664	Affordable on median individual earnings? £26,250	Affordable on LQ individual earnings? £17,513
<b>First Homes</b>									
Median, 30%	£238,000	£214,200	£23,800	-	£61,200	No	No	No	No
Median, 40%	£204,000	£183,600	£20,400	-	£52,457	No	No	No	No
Median, 50%	£170,000	£153,000	£17,000	-	£43,714	No	No	No	No
New Build Terrace, 30%	£255,497	£229,947	£25,550	-	£65,699	No	No	No	No
New Build Terrace, 40%	£218,997	£197,097	£21,900	-	£56,314	No	No	No	No
New Build Terrace, 50%	£182,498	£164,248	£18,250	-	£46,928	No	No	No	No
New Build Flat, 30%	£206,465	£185,819	£20,647	-	£53,091	No	No	No	No
New Build Flat, 40%	£176,970	£159,273	£17,697	-	£45,507	No	No	No	No
New Build Flat, 50%	£147,475	£132,728	£14,748	-	£37,922	Marginal	No	No	No
<b>Shared Ownership</b>									
Median, 10%	£34,000	£30,600	£3,400	£7,650	£34,243	Yes	No	No	No
Median, 25%	£85,000	£76,500	£8,500	£6,375	£43,107	No	No	No	No
Median, 50%	£170,000	£153,000	£17,000	£4,250	£57,881	No	No	No	No
Median, 75%	£255,000	£229,500	£25,500	£2,125	£72,665	No	No	No	No
New Build Terrace, 10%	£36,500	£32,850	£3,650	£8,212	£36,760	Yes	No	No	No
New Build Terrace, 25%	£91,249	£82,124	£9,125	£6,844	£46,276	No	No	No	No
New Build Terrace, 50%	£182,498	£164,248	£18,250	£4,562	£62,136	No	No	No	No
New Build Terrace, 75%	£273,746	£246,372	£27,375	£2,281	£77,996	No	No	No	No
New Build Flat, 10%	£29,445	£26,501	£2,945	£6,625	£29,655	Yes	No	No	No
New Build Flat, 25%	£73,613	£66,251	£7,361	£5,521	£37,332	Yes	No	No	No
New Build Flat, 50%	£147,225	£132,503	£14,723	£3,681	£50,127	No	No	No	No
New Build Flat, 75%	£220,838	£198,754	£22,084	£1,840	£62,921	No	No	No	No

Source: AECOM modelling, using Land Registry Price Paid Data, CACI Paycheck income data and ASHE earnings data. NB – benefits, including housing benefit are not included in the incomes/earnings in Table 7-12

7.53 Rent to Buy properties are starting to become available in Lewes, with two schemes in Newhaven in progress. Rent to Buy is covered in Figure 7-11 by market rent prices and affordability, since households accessing this product are

expected to be able to afford market rents. The Rent to Buy scheme then allows households to rent at a discount on market rents (20% off). The saving is accumulated and designed to be used as a deposit so that the household has the option to buy the home in the longer term. There is usually a 5-year commitment required, with the household receiving the accumulated proportion of the rent back after this period. Given the relative affordability of this option to Lewes households on median incomes, this is likely to present an attractive option for some households, particularly those who lack sufficient deposits to access mortgages, even for First Homes and shared ownership.

7.54 AECOM suggests that a reasonable benchmark for the affordability of affordable home ownership products is median household incomes. Lower quartile incomes represent the incomes of some of the poorest households, many of whom are likely to need subsidy to access rented housing. If the objective is to extend home ownership to these households, discounts on the price of market housing would need to be very large and by implication, the level of subsidy much greater.

7.55 Table 7-13 specifies the exact discount required for the key household groups to afford First Homes based on the different potential price benchmarks, further underscoring the justification for attaining the highest possible discount level subject to viability and other considerations.

**Table 7-13: Discounts Required for Lewes Households to Afford First Homes**

	<b>Median Household Income</b>	<b>Lower Quartile Household Income</b>	<b>Median Individual Earnings</b>	<b>Lower Quartile Individual Earnings</b>
<b>Median Property (New and Existing)</b>	56.8%	70.0%	71.8%	80.0%
<b>New Build Terrace</b>	59.7%	72.0%	73.7%	81.3%
<b>New Build Flat</b>	50.2%	65.4%	67.5%	76.9%

*Source: AECOM modelling, using Land Registry Price Paid data, ONS income estimates at MSOA area, CACI Paycheck income data, ASHE earnings data. Assumes households have a 10% deposit and borrow 3.5 times their incomes*

7.56 Table 7-14 analyses the income required for social and affordable rented housing of different sizes within Lewes district. Households on median incomes are able to afford all of the affordable and social rented properties with the exception of 4-bedroom affordable rented homes. However, they are unlikely to be eligible for these tenure products which are focused on those in acute need.

7.57 Excluding this group, households on lower quartile incomes are expected to be able to afford all sizes of socially rented units, including potentially those with 4+ bedrooms. Individuals with lower quartile earnings have significantly greater challenges with affordability, only seemingly able to marginally afford the smallest socially rented units. Many such individuals will, if unable to secure a social

rented dwelling, require additional subsidy through Housing Benefit to access housing.

7.58 Turning to affordable rent, households on lower quartile incomes are only marginally able to afford rents for 1-bedroom dwellings, while individuals on lower quartile earnings are not able to afford any of the dwellings priced at affordable rents. Again, these households may be able to secure housing benefit to support their housing costs.

7.59 Note again that the high cost of a bedsit relative to a 1-bedroom affordable rented home may be an anomaly in the data, which only includes a sample of 23 bedsit units.

**Table 7-14: Affordability of Affordable Rents in Lewes District**

Tenure	Price	Mortgage Value	Deposit	Rent	Income required	Affordable on median household incomes? £37,793	Affordable on LQ household incomes? £21,664	Affordable on median individual earnings? £26,250	Affordable on LQ individual earnings? £17,513
<b>Social Rent</b>									
4-bedroom	-	-	-	£6,420	£21,379	Yes	Marginal	Yes	No
3-bedroom	-	-	-	£5,968	£19,873	Yes	Yes	Yes	No
2-bedroom	-	-	-	£5,142	£17,123	Yes	Yes	Yes	No
1-bedroom	-	-	-	£4,643	£15,461	Yes	Yes	Yes	Yes
Bedsit	-	-	-	£3,930	£13,087	Yes	Yes	Yes	Yes
<b>Affordable Rent</b>									
4-bedroom	-	-	-	£12,757	£42,481	No	No	No	No
3-bedroom	-	-	-	£9,793	£32,611	Yes	No	No	No
2-bedroom	-	-	-	£8,416	£28,025	Yes	No	Marginal	No
1-bedroom	-	-	-	£6,607	£22,001	Yes	Marginal	Yes	No
Bedsit	-	-	-	£7,716	£25,694	Yes	No	Yes	No

Source: AECOM modelling, SDR tables, CACI Paycheck income data and ASHE earnings data. NB – benefits, including housing benefit, are not included in the incomes/earnings in Table 7-14.

7.60 The evidence gathered clearly demonstrates that the affordable rented sector performs a vital function Lewes as the only option for a large segment of those on the lowest incomes. Social rents are cheaper 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. However, where households are supported by housing benefit, 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 households supported by housing benefit may be no better off in social rented accommodation than affordable rented accommodation because they

receive a lower rate of housing benefit to cover their rent. Cheaper rents would make a substantial difference to households in the social rented sector who are not supported by housing benefit since the saving in rental costs would increase their disposable income.

7.61 Whilst it is too uncertain to forecast the future path of prices, rents, and household incomes, it is reasonable to assume that if current trends continue the affordability of housing to buy and rent will worsen over time. The cost of other essentials such as energy, food, and transport is also likely to impact on what households can afford to spend on housing costs, as inflation increases rapidly in the short term. The affordability of different housing options may be more closely linked to other living costs to a greater extent in the future.

## Summary

7.62 A number of observations about prices and rents are worth highlighting. Average (median) house prices have risen by around 64% over last 10 years in Lewes. House price growth in the district has slightly exceeded the rate of growth across the wider areas considered here, although current median prices in Lewes remain below those of the HMA and SPBA.

7.63 At the sub-district level, prices are highest around Lewes Town, followed by the Rural Area (particularly within the SDNP), with lower prices in the Coastal Area. A similar picture exists in the private rented sector. Price appreciation over the past decade is around 62% in Lewes and the Coastal Area, and 52% in the more rural parts of the district.

7.64 The price of newly built housing in Lewes district is consistently around 10% higher than housing overall (including existing and new homes). The new build premium is greater for flats, potentially because the new flats built in recent years have been in more desirable locations and/or in a more appealing condition than existing units. Flats were also the most common form of newly built housing sold in 2020-21.

7.65 Households on median incomes in Lewes district appear unable to afford median and lower quartile house prices (whether newly built or existing). This is the case regardless of the type of dwelling. Although flats are significantly more affordable than terraced dwellings, especially in terms of new builds, they are still out of reach to average households.

7.66 Private renting is generally more expensive in Lewes district than across the wider county, the South East, and country. This pattern is more consistent than for the value of homes for market purchase, suggesting Lewes district has a more competitive private rented sector than ownership sector. That said, there is only a relatively slight difference between median and lower quartile rents in Lewes district. Given the lower proportion of flats in the Lewes district stock compared to wider averages, it may be that the lower quartile and median rental properties

in Lewes district are larger or more likely to be a house than across the larger comparison areas, thereby raising the average.

- 7.67 Rental costs are high in comparison to lower quartile incomes. Only rooms in shared dwellings are accessible to lower earning households and individuals without additional subsidy. However, for households on median incomes, entry-level rents (two or fewer bedrooms), appear accessible, and median earning individuals can potentially afford studio units.
- 7.68 Substantial discounts would be required to make home ownership affordable in Lewes district. AECOM's estimates suggest a discount of around 57% on the price of median homes in the district would be needed to make them affordable to households on median incomes. A 60% discount is needed to bring new terraces within range of average earning households, but this falls to 50% for flats.
- 7.69 The precise discount would need to be determined by size of new home, the type of dwelling (such as terraces or flats), and the estimated sales price. However, on this basis it is fair to conclude that the maximum discount of 50% on First Homes is necessary from the perspective of affordability. Although only higher than average earners would benefit, a 50% discounted terraced First Home could be accessible to 34% of Lewes district's households, compared with 14% for existing terraces with no discount.
- 7.70 Whilst very substantial discounts would be needed to ensure households on average incomes can afford to buy, discounts of 30% or 40% (possible under the First Homes product) would extend home ownership to some households currently priced out of the market.
- 7.71 Rent to Buy appears to offer a relatively affordable route to home ownership for Lewes households on average incomes, with 2-bedroom properties appearing accessible. Section 8 suggests deposit requirements are a significant barrier for many households in the area and so this product may improve access to home ownership for those households who currently lack savings.
- 7.72 The affordable rented sector plays a vital role in Lewes district as the only option for a large segment of those in the greatest need, with individuals on lower quartile earnings only seemingly able to marginally afford the smallest socially rented units without additional subsidy in the form of housing benefit.

## 8. The Need for Affordable Housing

### Introduction

- 8.1 This section assesses the scale of need for affordable housing to rent and affordable housing to buy in Lewes district. This assessment is specifically tailored to meet the requirements of NPPF policy and PPG guidance in terms of estimating affordable housing needs. The section examines what types of households are considered to be in affordable housing need in Lewes district; and how local affordable housing supply and need can be calculated.
- 8.2 Given the price of housing to buy and rent and the pattern of affordability within Lewes district as discussed in the previous section, it is unsurprising that a proportion of households are unable to meet their needs within the market. These households are likely to need subsidised homes, either to rent or buy.
- 8.3 AECOM produce two estimates of the need for affordable housing:
- **Households who cannot afford to rent in the market and largely need social/affordable rented homes** - These are the households that are traditionally counted in affordable housing need assessments. They often lack their own homes, live in unsuitable or overcrowded housing, or have urgent social or medical needs; and
  - **Households who can afford to rent but cannot afford to buy and may need affordable home ownership products** - These households often do not lack their own housing. They typically live in the private rented sector but would prefer to own their own home. These households represent potential demand for affordable home ownership products. It is important to acknowledge that these households have more choice within the market than those who cannot afford to rent.
- 8.4 The NPPF (paragraph 62-63) requires local authorities to identify the need for housing overall, and specifically includes those who require affordable housing as one of the groups in the community for which housing needed should be assessed. Furthermore, the NPPF recommends that planning policies should specify the type of affordable housing required, where there is such need.
- 8.5 Affordable housing is defined in Annex 2 of the NPPF. This includes both affordable rented and affordable home ownership tenures. The NPPF therefore includes households requiring affordable home ownership in the total need for affordable housing. Whilst the practice guidance that accompanies the NPPF is not explicit in identifying how to assess the need for affordable home ownership, with the greatest focus being on identifying the more urgent needs of those who need affordable rent, PPG (see Figure 8.1) does recognise the need to identify these households. PPG on Housing needs of different groups explicitly states that those who cannot afford to own a home, where that is their aspiration, are considered as in need of affordable housing.



## Figure 8.1: PPG on Affordable Housing Needs of Different Groups<sup>49</sup>

### **Affordable housing**

#### **What types of households are considered to be in affordable housing need?**

All households whose needs are not met by the market and which are eligible for one or more of the types of affordable housing set out in the definition of affordable housing in [Annex 2 of the National Planning Policy Framework](#) are considered to be in affordable housing need.

*Paragraph: 005 Reference ID: 67-005-20190722; Revision date: 22 07 2019*

#### **How can affordable housing need be calculated?**

Strategic policy-making authorities will need to estimate the current number of households and projected number of households who lack their own housing or who cannot afford to meet their housing needs in the market.

The unmet (gross) need for affordable housing by assessing past trends and current estimates of:

- the number of homeless households;
- the number of those in priority need who are currently housed in temporary accommodation;
- the number of households in over-crowded housing;
- the number of concealed households;
- the number of existing affordable housing tenants in need (i.e. householders currently housed in unsuitable dwellings); and
- the number of households from other tenures in need and those that cannot afford their own homes, either to rent, or to own, where that is their aspiration.

Care should be taken to avoid double-counting, which may be brought about with the same households being identified on more than one transfer list, and to include only those households who cannot afford to access suitable housing in the market.

Suggested data sources: Local authorities will hold data on the number of homeless households, those in temporary accommodation and extent of overcrowding. The Census also provides data on concealed households and overcrowding which can be compared with trends contained in the English Housing Survey. Housing registers and local authority and registered social landlord transfer lists will also provide relevant information.

*Paragraph: 006 Reference ID: 67-006-20190722; Revision date: 22 07 2019*

#### **How can the current total affordable housing supply available be calculated?**

There will be a current supply of housing stock that can be used to accommodate households in affordable housing need. As well as future supply. Therefore, assessing the total affordable housing supply requires identifying:

the number of affordable dwellings that are going to be vacated by current occupiers that are fit for use by other households in affordable housing need;

suitable surplus stock (vacant properties); and

the committed supply of new net affordable homes at the point of the assessment (number and size).

Sources of data: Ministry of Housing, Communities and Local Government affordable housing supply statistics to show recent trends, and local authority and Registered Social Landlord records including housing register, transfer lists, demolition and conversion programmes, development programme of affordable housing providers.

*Paragraph: 007 Reference ID: 67-007-20190722; Revision date: 22 07 2019*

#### **How is the total annual need for affordable housing calculated?**

The total need for affordable housing will need to be converted into annual flows by calculating the total net need (subtract total available stock from total gross need) and then converting total net need into an annual flow based on the plan period.

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

*Paragraph: 008 Reference ID: 67-008-20190722; Revision date: 22 07 2019*

<sup>49</sup> Last updated at the time of writing on 24<sup>th</sup> May 2021

## Approach

- 8.6 This section provides an assessment of the need for affordable housing in Lewes district. It draws on information from the local authority's Waiting List, CORE lettings data, data on prices and rents set out in Section 7 of this report; household incomes as set out in Section 5; and the demographic projections contained in Section 5 of this report.
- 8.7 The rest of this section deals with the inputs and assumptions at each stage in estimating the need for affordable housing. A separate estimate is provided for a) households who cannot afford to rent in the market; and b) households who can afford to rent but are unable to afford to buy.
- 8.8 It is important to emphasise that this analysis presents estimates of the need for affordable housing based on the available data and evidence-based assumptions. This is not a precise science; rather it is about identifying the broad scale and nature of needs. This section does not discuss policy implications or make judgements about how affordable housing needs should be met, since this is a matter for Lewes District Council and the South Downs National Park Authority in their policy development roles.
- 8.9 Data in this section relates to the whole of Lewes district. It has not been possible to disaggregate needs to the areas within and outside of the South Downs National Park. It may be possible to update this if data from the Waiting List can be provided. Otherwise, figures can be pro-rated on the basis of dwelling stock or population share in the two areas (as with the Standard Method discussed in Section 4). AECOM estimate that around 125 (rounded) households need affordable rented housing in the Lewes Local Plan area (area of the district outside of the SDNP).<sup>50</sup> AECOM estimates a further 165 households each year who can afford to rent but cannot afford to buy if the Lewes district estimate is apportioned to the Lewes Local Plan area (part district outside of SDNP). Taken together, this estimates around 290 households in need of some form of affordable housing in the part of Lewes district outside of the SDNP.

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<sup>50</sup> This is based on 73.4% of people and dwellings in Lewes District located outside of the SDNP

## Households in Need of Affordable Rented Housing

8.10 This sub-section estimates the need for affordable housing amongst those unable to rent in the market.

**Figure 8.2: The Need for Affordable Rented Housing in Lewes District**

Stage and Step in Calculation	Total	Description and sources
<b>STAGE 1: CURRENT NEED</b>		
1.1 Current households in need	1,090.0	Latest Waiting List data available from DLUHC Local authority housing statistics data return (households in priority need).
1.3 Total current need	1,090.0	
1.2 Per annum	<b>54.5</b>	1.1 divided by the plan period (20 years)
<b>STAGE 2: NEWLY ARISING NEED</b>		
2.1 New household formation	558.8	ONS 2014-based household projections, consistent with Lewes Standard Method calculation
2.2 Proportion of new households unable to rent in the market	53.0%	Proportion of households with incomes insufficient to afford to rent (2 bed lower quartile property)
2.3 New households unable to rent per annum	<b>296.2</b>	2.1 * 2.2
<b>STAGE 3: SUPPLY OF AFFORDABLE HOUSING</b>		
3.1 Supply of social/affordable re- lets (including transfers)	<b>181.3</b>	Average lettings in LA and nominations to RP stock (last 3 years) - includes general needs and supported
<b>NET SHORTFALL OF RENTED UNITS PER ANNUM</b>		
Overall shortfall per annum	<b>169.7</b>	Step 1.2 + Step 2.3 - Step 3.1
Overall shortfall over the plan period	<b>3,393.3</b>	Shortfall per annum * plan period

Source: data sources detailed in table

8.11 AECOM estimate that there is a need for around 3,393 new subsidised rented homes in the district over the plan period. This would entail the provision of 170 (rounded) new affordable rented homes each year over a 20-year plan period. Note that a key input in this calculation is household formation (2.1) based on the 2014 based household projections. As discussed in Section 4, if these household projections are reviewed by Government in the future this may reduce the affordable housing shortfall identified here (in line with any reduction in overall household projections). As this estimate relates to the whole district, it is possible to estimate that around 125 (rounded) households need affordable rented housing in the Lewes Local Plan area (area of the district outside of the SDNP).<sup>51</sup>

8.12 Figure 8.2 summarises the estimated need for affordable rented housing and shows each step in the calculation. Every effort has been taken to avoid double counting of households. The summary shows the need for the number of affordable homes required each year provided at affordable (or subsidised) rents.

8.13 The estimates exclude supply from the delivery of new affordable housing in the future since this is uncertain. The assessment is designed to inform how much new affordable housing might be required. The estimates also exclude the supply of private rented properties that will be released when these households are

<sup>51</sup> This is based on 73.4% of people and dwellings in Lewes District located outside of the SDNP

housed in affordable housing. At present, these properties play a significant role in meeting some housing needs.

8.14 The need for homes of those who are able to pay market rents but are unable to access home ownership is considered separately in this section.

## **Stage 1: The Current Need for Affordable Rented Homes**

8.15 Stage 1 of the assessment considers the number of existing and hidden households who are currently in housing need.

8.16 The inputs to this assessment are based on a variety of data sources which, in most cases, represent actual numbers and the real circumstances of individual households who have approached the Council for assistance regarding their housing situation. This approach reflects the recommendation in PPG that this assessment is undertaken using secondary data.

8.17 The estimates set out in Figure 8.2 include only those applicant households whose circumstances fall within the housing need criteria set out in the PPG. This includes the following:

- the number of homeless households;
- the number of households in priority need who are currently housed in temporary accommodation;
- the number of households in over-crowded housing;
- the number of concealed households;
- the number of existing affordable housing tenants in need (i.e. householders currently housed in unsuitable dwellings); and
- the number of households from other tenures in need, including those that cannot afford their own homes, either to rent, or to own, where that is their aspiration.

8.18 Lewes District Council maintains a Housing Waiting List which makes it possible to identify applicants with these needs. The exception is the number of households from other tenures who cannot afford to own. These households are considered separately in the estimate of need for affordable home ownership. It is also possible that the Waiting List does not fully reflect the number of concealed or overcrowded households since not all will register with the Council.

8.19 AECOM has therefore cross checked the Waiting List figures with the numbers of overcrowded households recorded in the Census 2021. In 2021, 1,059 households were overcrowded in the district. However, this figure was lower than the Waiting List figure at this time so it cannot be assumed that there are additional overcrowded households who are not on the waiting list by relying on this data set alone.

8.20 Census data on concealed households in 2021 record 513 concealed families in the district. This is an increase of 36% since 2011, similar to the increase in the South East as a whole (40%). As with overcrowded households, the figure for concealed households is lower than the waiting list so we cannot be sure there are additional households who should be counted as in need. However, AECOM would suggest it is highly likely that there are additional households in need of affordable rented accommodation either by virtue of their overcrowded homes, or that they are concealed households, but have not registered on the Council's waiting list. It is worth noting that most concealed families are couples without children (286 in 2021), followed by single parents with children (142 in 2021). 12% of the growth in families in Lewes District between 2011 and 2021 was amongst concealed families. 1.7% of all family households were concealed in 2021, similar to the South East at 2%.

8.21 Figure 8.3 shows that there are just over 1,090 households currently on the Council's Housing Waiting List in Lewes District. These households meet one or more of the criteria in paragraph 8.19. Note that LDC confirm there were 1,127 households on the waiting list as at July 2022. This implies that levels of need have increased in the most recent year and would have the effect of increasing the shortfall.

**Figure 8.3: Households in Need on the Lewes Waiting List**

Year	Total	1 bed	2 bed	3 bed	4 bed
2020/21	1,090	537	265	213	75
2019/20	1,053	506	288	199	60
2018/19	869	412	235	166	56

Source: Lewes District Council's Local Authority Housing Statistical Return (DLUHC website)

8.22 It is also clear that not all households who live in the private rented sector (PRS) and claim Housing Benefit are registered on the Waiting List. In May 2022, there were 3,729 households claiming housing benefit or universal credit with housing entitlement<sup>52</sup> and living in the PRS in Lewes District. By definition these households cannot afford to rent in the market so can be considered in need of affordable housing. Given that there are 1,090 households on the Waiting List, it is clear that some households living in the PRS and supported by housing benefit are not registered. However, some will be receiving only small amounts of housing benefit, and some may prefer living in the PRS because they have more flexibility over their location (e.g. to be within a school catchment area or close to their workplace).

8.23 Since Government endorses the use of the PRS to meet housing needs through the administration of housing benefit and allows local authorities to discharge homelessness duties in the PRS, it is assumed that unless households living in

<sup>52</sup> Housing Benefit is in the process of being moved across to Universal Credit (with housing entitlement). DWP are aware that there may be some double counting of households (although this is believed to be minimal) and AECOM consider that it is more accurate to use the sum of both than solely the Housing Benefit figure.

the PRS are registered on the Waiting List, they are not in need of affordable housing.

## Stage 2: Newly Arising Need for Subsidised Rented Housing

8.24 Stage 2 of the assessment considers the number of new and existing households who are likely to fall into housing need in the future. This stage of the assessment is based upon:

- Projected household formation<sup>53</sup> and the proportion of these newly forming households unable to rent in the market<sup>54</sup>; and
- Existing households falling into need during the course of the plan period.

8.25 The 2014 based household projections estimate the formation of 558 new households each year in Lewes between 2021 and 2031. This period is used to be consistent with the Lewes local housing need calculation, in line with the Standard Method (as set out in Section 4). The annualised figure is assumed to extend to the whole plan period. The assessment then estimates the number of these households unable to afford private rent. It assumes the following:

- The cost of renting a two-bedroom dwelling is used, as this represents a good proxy for all households on the Waiting List, who require a range of differently sized properties.
- It has been assumed that households can spend up to 30% of their gross household income on rent.<sup>55</sup> In practice, households may be able to spend more or less in order to retain sufficient funds for other essentials (e.g. food and fuel). The addition of Housing Benefit further complicates this assumption, since households who are wholly reliant on benefits for their incomes will spend substantially more than 30% on their rent.

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<sup>53</sup> There is some uncertainty in the guidance as to whether it intends assessments to use gross or net household projections. The projected level of gross household formation is different to the net household projections used in Section 5, in the Standard Method and in the estimate in Figure 8.2. Gross household projections only count new households and do not take account of the dissolution of existing households. When existing households dissolve (e.g. through death, divorce or when single households join to form couples) they release a property, even if they go on to form a new household. A justification for using gross household projections is that there is no guarantee that any properties released when households form would be of suitable tenure or cost for those in need. Nevertheless, it is likely that some of these homes could be used to meet needs and so excluding them is likely to result in an overestimate of need. Furthermore, gross household projections are not publicly available and their use would be inconsistent with the use of net projections in other parts of the LHNA.

<sup>54</sup> AECOM has checked whether there are cheaper alternatives to private renting in the shared ownership market; and, if so, whether the affordability of shared ownership should be used instead of the affordability of private renting to identify households who could meet their own needs.

<sup>55</sup> A review of the assumptions used by other SHMA/LHNA studies was undertaken by the AECOM team. Studies used assumptions in the range of 25-40% gross incomes with 30% or 33% being most commonly used. It was concluded that 30% represented a reasonable and robust assumption and is used across AECOM's LHNA and neighbourhood level HNA studies.

- The range of household incomes in the district is provided by CACI modelled income data (detailed in Section 5). This range applies to all households in the district and does not specifically reflect the incomes of new households which are likely to be lower on average.
- 8.26 On this basis, 53% of new households are unable to afford to rent in the market in Lewes district. This equates to 296 households who will form each year over the plan period and need affordable rented housing.
- 8.27 2014 based household projections are used for consistency with the Government's standard method. If, as proposed in its December 2022 consultation, the household projections used in the standard method are reviewed in line with the Census 2021, this affordable housing estimate could be updated along with the standard method calculation. It is likely that household projections developed post Census 2021 will be lower than the 2014 based projections and this would therefore reduce the LHN and affordable housing estimate is likely to reduce in proportion to this.
- 8.28 The second component of the estimate of newly arising need is the number of existing households falling into need. PPG does not provide any guidance on how to calculate this element, or how to ensure that double counting between new households and existing households does not occur. The two commonly used sources for estimating the number of existing households falling into need are changes in Waiting List figures over time and changes in the number of housing benefit claimants. If either of these indicators exceeds the number of newly forming households in need then it is possible to assume that the additional households are existing households falling into need.
- 8.29 However, in the case of both the Waiting List and housing benefit data, the number of applicants and claimants recorded over recent years does not provide evidence of existing households falling into need. Figure 8.3 shows that the number of applicants in priority need on the Waiting List in Lewes has increased over the last 3 years by an average of 110 per annum. This is substantially lower than the expected increase in new households falling into need (296 per annum) which is already included as an input. For this reason, AECOM assumes that the figure for new households falling into need adequately covers the flow of existing households into need, otherwise the growth in the Waiting List would be higher.
- 8.30 The number of housing benefit claimants (both housing benefit and Universal Credit with a housing element) in Lewes District increased over the same period to 3,538 in 2022 from 3,087 in 2020, an increase of 150 households. Housing benefit data does not provide evidence of an additional flow of existing households falling into need which is not already captured by the assessment.
- 8.31 AECOM suggest that whilst the guidance includes existing households falling into need as an input to this estimate, the data suggests that there are not additional households, beyond the figure of new households falling into need,



which should be counted in this assessment without the risk of double counting and it is therefore assumed this figure is zero.

### **Stage 3: Affordable Rented Housing Supply to Offset Need**

8.32 Stage 3 in the assessment establishes the supply of affordable housing that can be used to offset need. According to the guidance (paragraph 22 of PPG on Housing and economic needs assessment, last updated December 2020) this takes into account:

- the number of affordable dwellings that are going to be vacated by current occupiers and are fit for use by other households in need;
- suitable surplus stock (vacant properties); and
- the committed supply of new net affordable homes at the point of the assessment (number and size). Note that this supply is not included in the estimate of need here for reasons discussed in para 8.32 below.

8.33 AECOM has used the average number of lettings in Lewes district in the last three years at the time of writing, including lettings to transfer tenants and lettings of supported housing. This data includes both local authority and registered provider lettings to households on the Lewes Waiting List. This provides the number of affordable dwellings to be vacated by current occupiers for use by other households in need (first bullet point in PPG paragraph 22).

8.34 Overall, 181 homes were re-let on average in the last 3 years. It is assumed that this supply can be used to offset the needs identified in Stages 1 and 2 of the assessment. Note that this figure includes lettings to transfer tenants because transfer tenants are included in the waiting list figure above.

8.35 Figure 8.4 includes lettings of supported housing units, which takes into account lettings of sheltered housing and lettings which provide support for vulnerable people. Whilst not all households on the Waiting List are eligible for supported housing, supported housing is nevertheless included in the supply of affordable housing. This is because households in need of supported accommodation are included in the assessment of affordable housing need through the Waiting List.

8.36 The PPG does not give any detail on how vacant properties should be treated. Previous government SHMA guidance<sup>56</sup> stated that ‘a certain level of voids is normal and allows for transfers and works on properties. However, if the rate is in excess of approximately 3 per cent and properties are vacant for considerable periods of time, these should be counted as surplus stock.’ As vacant properties account for less than 1% of the social rented stock in Lewes district, they are not considered as part of the available supply.<sup>57</sup>

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<sup>56</sup> [\[Withdrawn\] Strategic housing market assessments: practice guidance - GOV.UK \(www.gov.uk\)](#)

<sup>57</sup> In the 2020/21 Local Authority Housing Statistics Return, 32 social rented dwellings were vacant compared to over 3,218 in the stock and therefore accounting for less than 1% of the stock.



- 8.37 The estimated supply of affordable units in AECOM's calculation (Figure 8.2) does not contain the committed supply of affordable units over the assessment period. AECOM suggest the PPG is misleading in this respect since the aim is to establish the need for affordable homes so that Local Plans can develop appropriate policies. If future supply is included and used to offset identified needs it risks confusing the picture. This would mean the assessment only identified *net additional* affordable housing needs, over and above those provided for by the application of current policies. In practice, LPAs need to know their full affordable housing need and to consider what level and mix of affordable housing is required to meet it. Furthermore, future commitments are uncertain – not all planning permissions will be built out – so the inclusion of future commitments risks underestimating overall needs. Future commitments can nevertheless be used at a later point, to estimate supply which may address identified full need, if it comes forward.
- 8.38 The estimate of need for affordable rented housing (in Figure 8.2) also excludes any supply of affordable home ownership products such as shared ownership. These options are likely to be unaffordable to the households identified in this part of the affordable housing needs assessment, who are in acute housing need and likely to need some form of affordable rented accommodation.<sup>58</sup> Need for affordable home ownership is considered separately in this section.
- 8.39 Finally, our estimate of need for affordable rented housing also excludes the supply of private rented properties which may provide affordable rented accommodation when households are in receipt of housing benefit. Unlike the re-lets within the social/affordable rented sector, these private rented dwellings are not used to offset identified need. Whether the PRS should play an active role in meeting housing needs, either by addressing the need for subsidised rental accommodation or by deeming it as a suitable alternative for those who aspire to home ownership or both, is a policy decision for the Council.
- 8.40 Lewes District Council's Homelessness review (2021) identified barriers to accessing the PRS amongst households on low incomes (and on housing benefit). LDC's review noted that Local Housing Allowance rates are much lower than the rents of available rental homes advertised on Rightmove in the District<sup>59</sup>. Furthermore, the Rightmove search illustrated the low number of PRS vacancies available across Lewes, returning a total of 37 vacancies across the whole District. Only six of the homes listed were available at rents below the respective LHA rates. The Council's review concluded that the limited size of the PRS market in Lewes was likely to continue to restrict the role it could play in meeting housing needs across the district.

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<sup>58</sup> In AECOM's experience of analysing LPA Waiting Lists, there is often some limited overlap between households on local authority Waiting Lists for affordable rented housing and households who are interested and may be able to afford affordable home ownership. In the LPAs where the AECOM team have worked, this is consistently below 10% of applicants. Even those with sufficient incomes are unlikely to have savings to meet deposit requirements.

<sup>59</sup> Right move search conducted for rental properties across the district – 4<sup>th</sup> June 2021.

8.41 The gap between PRS rents and what households can claim in housing benefit or the housing element of Universal Credit, under Local Housing Allowance rates, means that where households are living in the PRS many are likely to be topping up their rent, stretching themselves further financially and reducing disposable income for other essentials such as food and energy costs. The ability of households to do this in the future is likely to be severely impacted by increases in the cost of living, including the rising cost of energy bills and knock on inflation in food and other prices.

## **Current Size Requirements for Affordable Rented Housing**

8.42 Analysis of the characteristics of applicant households on the Waiting List and the profile of lettings together provide evidence of the pressures on different sized properties in Lewes. Figures 8.5 to 8.8 show the proportion of households in need by the size of property that they require, the size of homes re-let over the last three years, and the number of households waiting for each size of property.

8.43 It is important to remember that the size of property that each household requires is determined by the local authority's allocation policy. In reality, even those households judged to 'need' a one-bed property may prefer a larger home. However, given the shortage of affordable housing, local authority allocation policies will generally only provide households with properties meeting their minimum requirements. This means that households identified on Waiting Lists as needing a one-bed property include couples as well as single people. Many of these couples may go on to start a family and would then need re-housing.

8.44 Similarly, households containing two young children may be allocated a home with just two bedrooms, with the expectation that the children can share a bedroom. The size requirements of households accessing the affordable rented sector are therefore fundamentally different to the market sector because households are only allocated a property that meets their basic minimum requirements. In contrast, in the market sector households may be able to choose more space to allow for the expansion of their family or to provide space for other activities, visitors, home working or studying, if they can afford this.

8.45 In examining the size requirements of those identified as in housing need, it is important to keep this rationing process in mind. Furthermore, small properties become available for re-let most frequently, both because they are more numerous and because households living in these properties are more likely to move for the reasons discussed above. There are fewer larger properties and households living in larger homes are less likely to move. The stock of larger properties in the affordable rented sector has also been depleted disproportionately through Right to Buy.

8.46 The spare room subsidy (sometimes referred to as the 'bedroom tax') may have had an effect on the release of larger social rented homes as households reliant on housing benefit have their payments reduced where they are under-occupying a property. However, this reduction in housing benefit and disincentive to under-

occupy only applies to working-age households, so will not encourage downsizing amongst older households who are much more likely to be under-occupying their homes.

8.47 Figures 8.4 and 8.5 show that the largest need for affordable rented homes is smaller (1 and 2 bed) properties, with almost three quarters of households in priority need on the Waiting List entitled to this size of property. A smaller, but substantial proportion of households need homes with 3 or more bedrooms (27% of applicants in 2020/21). This pattern is consistent with most local authority areas the AECOM team has worked in.

8.48 The availability of affordable housing for these households through lettings within the stock of primarily social rented homes in Lewes district is skewed towards 1- and 2- bedroom homes (Figure 8.6). In 2018/19 (latest available data broken down by size) 88% of lettings were 1-bedroom properties. Just 12% were 3+ bedroom.

**Figure 8-4: Lewes District Waiting List by size of property required**

Waiting list	Total	1 bed	2 bed	3 bed	4 bed
2020/21	1,090	537	265	213	75
2019/20	1,053	506	288	199	60
2018/19	869	412	235	166	56
Average (3 years)	1,004	485	263	193	64

Source: Local authority housing statistics data returns (DLUHC)

**Figure 8-5: Lewes District Waiting List by size of property required (%)**

Waiting list	Total	1 bed	2 bed	3 bed	4 bed
2020/21	100%	49%	24%	20%	7%
2019/20	100%	48%	27%	19%	6%
2018/19	100%	47%	27%	19%	6%
Average	100%	48%	26%	19%	6%

Source: Local authority housing statistics data returns (DLUHC)

**Figure 8-6: Lettings by size of property in 2018/19 (latest available data by size)**

Size	Number	%
1 bed	78	48%
2 bed	66	40%
3 bed +	20	12%
Total	164	100%

Source: CORE data returns (excludes supported housing)

8.49 Comparing households needing different sized properties to the size of homes available through lettings gives an indication of pressures on different sized homes which is not evident from the size requirements of households on the Waiting List.

8.50 Figure 8-7 shows that the highest pressure is on 3-bedroom plus properties. In 2018/19 (latest data where households and lettings can be compared), there were 13 households for every 3-bedroom or larger property let. For 2-bedroom homes, there were 4 applicant households for every property let. For 1-bedroom homes, 6 applicants were waiting for every available property. The pressure was greatest on larger properties and relatively lower on smaller properties. This pattern contrasts with the high absolute need for smaller dwellings.

**Figure 8-7: Pressure on Different Sized Affordable Rented Lettings, Lewes District**

Size	Households in Need	Lettings	Ratio of households in need to lettings of size required
1 bed	485	78	6.2
2 bed	263	66	4.0
3 bed +	256	20	12.8

Source: 3 year average Waiting List figures; 2018 CORE lettings reports for social and affordable rented general needs lettings.

## Households in Need of Affordable Home Ownership

8.51 There is no policy in NPPF or guidance in PPG on how to quantify need or demand from households who can rent but would prefer to buy. However, products aimed at these households are included in the definition of affordable housing in Annex 2 of the NPPF. AECOM has developed an approach for estimating the scale of need from these households (set out in Table 8-8 and explained in paragraphs 8.56 onwards). It is based on the approach to estimating more traditional forms of housing need. This therefore includes a process of identifying a backlog, estimating newly arising needs over the plan period, and offsetting these against any suitable affordable housing supply through resales and surplus stock (not including commitments for new supply to be build).

8.52 AECOM’s estimate suggests there may be around 225 households each year who can afford to rent but cannot afford to buy in Lewes district and would prefer to do so. If this figure is apportioned to the Lewes Local Plan area (part district outside of SDNP), this would equate to an estimated 165 households. It is

important to remember that most of these households are likely to be adequately housed in the private rented sector. They do not lack housing in the same way as those households who cannot afford to rent.

**Figure 8-8: Need or Potential Demand for Affordable Home Ownership**

Stage and Step in Calculation	Total	Description and sources
<b>STAGE 1: CURRENT NEED</b>		
1.1 Current number of private renters in Lewes	7,431	Census 2021 number of renters
1.2 Number of private renters on housing benefit in LA	3,729	Renters in March 2021 on housing benefit and universal credit with housing entitlement (Stat-Xplor)
1.3 Number of private renters outside home buying age group	742	Renters not on housing benefit but under age of 24 or over age of 65 (PRS by age data from 2011 Census)
1.4 Renting by choice	740	$(1.1) - (1.2 + 1.3) \times 25\%$
1.4 Current potential demand (households)	2,220	$(1.1) - (1.2 + 1.3 + 1.4)$
1.5 Per annum	111	Step 1.4 divided by plan period (20 years)
<b>STAGE 2: NEWLY ARISING NEED</b>		
2.1 New household formation	558.8	LA household projections for plan period (2014 based)
2.2 % of households unable to buy but able to rent	24%	Proportion of households who can afford 2 bed LQ rent but cannot afford LQ purchase
2.3 Total newly arising need per annum	134	Step 2.3 divided by plan period
<b>STAGE 3: SUPPLY OF AFFORDABLE HOUSING</b>		
3.1 Supply of affordable housing	410	Number of shared ownership homes (Census 2021)
3.2 Supply - intermediate resales	21	Step 3.1 * 5% (assume rate of re-sale)
<b>NET SHORTFALL (OR SURPLUS) PER ANNUM</b>		
Overall shortfall (or surplus) per annum	225	$(\text{Step 1.5} + \text{Step 2.4}) - \text{Step 3.2}$
Overall shortfall (or surplus) over the plan period	4,492	$(\text{Step 1.4} + \text{Step 2.3}) - \text{Step 3.2} * \text{number of years to end of plan period}$

Source: data sources provided in table

8.53 The estimate in Figure 8-8 suggests there is substantial potential demand from these households for affordable home ownership products. However, this potential demand does not necessarily equate to the need or demand for 225 affordable home ownership homes each year as these households have various options within the market. For example, they may decide to stay in the PRS for longer to save funds for a deposit, with the expectation of being able to buy in the open market at a later date. Alternatively, they may choose to move to a cheaper location where they are able to buy in the open market.

8.54 It is important to state that most of those households identified as unable to afford to buy are living in the private rented sector. As with the estimate of households unable to rent, any PRS properties released as these households access affordable housing are not counted as supply which can be offset to meet need.

8.55 The Council may make policy decisions to use these properties to meet needs, either for those who cannot afford to rent or those unable to buy. It is important to note that these PRS properties may provide suitable housing for other groups (those that rent out of choice) or may be sold on the open market in future and so become available for home buyers.

8.56 The rest of this section sets out how the estimate of the need for affordable home ownership products is calculated.

## **Current Households Who Cannot Afford To Buy**

8.57 The first step (1.1 in Figure 8-8) identifies the level of ‘current need’ in a similar way to how the assessment in Figure 8.2 identifies current need for affordable rented homes. This step recognises that the majority of households living in the private rented sector would prefer to access home ownership. This is supported consistently in national surveys, most recently one undertaken by IPSOS Mori confirmed that 80% of all households aspire to own their own home.<sup>60</sup> At the national level, home ownership rates have fallen in recent years as affordability has declined, particularly amongst younger households, and there is a significant backlog of households who have been priced out of home ownership.

8.58 The approach taken here to estimate this backlog is to identify the current size of the private rented sector in Lewes district using Census data from 2021.

8.59 It would be inappropriate to assume all of the PRS households identified in Figure 8-8 are potential home-owners. The estimate of current need, or potential demand, thus subtracts households who are housing benefit claimants. It also discounts households in the youngest and oldest age groups because they are unlikely to be in a position to buy. Finally, a proportion of households will rent out of choice for the flexibility it provides. In summary the following households were discounted:

- Housing benefit claimants: there were 3,729 households supported by housing benefit or universal credit (housing entitlement) in the private rented sector in Lewes district at the time of the 2021 Census. Households who are supported by housing benefit are unable to afford market rents and so cannot be considered as part of the group who ‘can rent but can’t buy’ and are unlikely to represent potential demand for affordable home ownership.
- Youngest and oldest households: AECOM has assumed that households in the PRS age 24 and under are unlikely to be able to buy at the present time. Some of these households are students and others will not have had sufficient time to build a deposit. The average age of first-time buyers nationally is 30+. Whilst it might be desirable for younger households to afford to buy, AECOM consider it is reasonable to discount the youngest group. This does not mean some of these households should not access affordable home ownership. Rather, it is a reasonable assumption that most

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<sup>60</sup> <http://www.ipsos-mori-generations.com/housing.html>

will not yet be in a position to do so. AECOM has also discounted households living in the PRS who are aged 65 and over. The vast majority of these households will not be seeking to buy and may not be able to obtain a mortgage. It is assumed that these households will remain in the PRS.

- Some households rent out of choice: whilst national studies suggest that the vast majority of households aspire to own a home, around 20-25% of households generally do not wish to buy. Households will rent out of choice at certain stages of their lives for flexibility, or because they are recent in-migrants to the area (particularly if moving from overseas).

8.60 When these groups are discounted from the total number of households in the PRS in Lewes district, this suggests there are 2,220 households who may be considered potential home-owners. They can afford private rents but are unable to afford home ownership. These households represent 'current need' for affordable home ownership. If their needs were addressed over the plan period this would equate to 111 households each year.

8.61 Figure 8-8 also estimates newly arising need for affordable home ownership as households form over the plan period. 558.8 households are estimated to form each year over the plan period according to household projections. This is based on 2014 based household projections, consistent with the Government's standard method. AECOM has estimated that 24% of these new households are able to afford to rent but unable to buy on the basis of rents, house prices, and local incomes, as contained in Section 7. As such, there may be 134 households forming each year who need or want affordable home ownership.

8.62 The estimate then discounts the annual supply of affordable home ownership property resales from the annual need (or potential demand). Supply is assumed to be around 21 homes per annum on the basis of an assumed level of resales (5%)<sup>61</sup> within the existing stock of affordable home ownership properties in Lewes (there 410 shared ownership properties in 2021).

8.63 It is important to emphasise that private rented properties are not considered suitable supply to meet this need because it is assumed these households would prefer home ownership. However, these households do have other choices in the market and do not lack housing. Rather, they would prefer a different tenure.

8.64 It is also possible that some of the households identified in this estimate would be able to afford to buy in the open market if they are able to access properties priced below lower quartile levels. The supply of properties at the cheapest end of the market may therefore meet some of this need. It is difficult to quantify this accurately without more detailed data on the incomes of households living in the PRS. It is also uncertain to what extent the cheapest properties for sale would be a suitable size or condition to meet these needs. As such, lower quartile prices are used as the benchmark for affordability for this group and this is considered a reasonable assumption to make. This may, however, result in some over-

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<sup>61</sup> This is a reasonable assumption based on transactions of market sale properties.

estimation of the scale of need for affordable home ownership. However, AECOM would emphasise that this should be expressed as potential demand rather than a precise level of need. Therefore, the estimate may be regarded as an upper estimate of potential demand.

## **Characteristics of Households Needing Affordable Home Ownership**

- 8.65 The Help to Buy Agent which covers Lewes district maintains a list of households who are interested in affordable home ownership. The data from this register can shed insight onto the type of households who may need or want affordable home ownership. It is likely that this register underrepresents the scale of potential demand for affordable home ownership as not all of those who may need it will be aware of the register and others may not be actively pursuing the route at this time. Nevertheless, the households living in Lewes district who are registered give an indication of the scale of the active market for these products and the data also provides valuable information on the characteristics of these households.
- 8.66 There are 53 households currently registered as interested in affordable home ownership products in Lewes district. It is relevant to note that this is a small number compared to other LPAs where this data has been obtained. This may reflect more limited active demand, or could indicate that households are unaware of the register or reluctant to register for some other reason (eg low expectations of availability or affordability). The 53 registered households equate to around 1/5 of the estimated annual potential demand for these products as identified by AECOM in Table 8-8.
- 8.67 The vast majority of applicants (81%) on the register currently live in the private rented sector (including living with friends and family). 2 households (4%) are existing shared owners. 5 households (9%) are social housing tenants.



**Figure 8-9: Household Size of Help to Buy Applicants, Lewes District**

Household Size	Number	%
1 person	17	32%
2 people	23	43%
3 people	6	11%
4 people	7	13%
Total	53	100%

Source: Help to Buy South register, data obtained by LDC

8.68 The largest proportion (64%) of households are young (aged under 40), with 11% aged 16-24 and a further 53% aged 25-39.<sup>62</sup>

**Figure 8-10: Property Size Required by Help to Buy Applicants**

Dwelling Size (Bedrooms)	Number	%
1 bed	11	21%
2 beds	32	60%
3 beds	9	17%
4 beds	1	2%
Total	53	100%

Source: Help to Buy South register, data obtained by LDC

8.69 The majority of applicants households are small, with 32% single people and 43% containing two people. However, a substantial proportion (23%) contain 3 or more people and are likely to need family sized accommodation (Figure 8-9). In terms of the size of property required, 60% require a two-bedroom property. Only 21% require a 1-bedroom property (compared to 32% single person applications), indicating that many single person households are seeking homes with 2 or more bedrooms. 19% of households require a home with 3 or more bedrooms.

8.70 This is a profile which is typical of demand for affordable home ownership in other parts of the South East, in AECOM's experience. However, the profile of demand will, to some extent, reflect the nature of the products that have been available in recent years (e.g. largely shared ownership). Availability will have shaped potential demand to some extent since households may be reluctant to apply if they do not think there is a prospect of the available products meeting their needs.

<sup>62</sup> Not all applicant ages are recorded so these percentage reflect the ages of those who responded (38 out of 53 households)

**Figure 8-11: Income of Households on Help to Buy Register, Lewes District**

Income	Number	%
Under £20k	17	32%
£20k to less than £30k	12	23%
£30k to less than £40k	12	23%
£40k to less than £50k	8	15%
£50k+	4	8%
Total	53	100%

Source: *Help to Buy South, data obtained by LDC.*

8.71 Figure 8-11 provides a broad breakdown of the incomes of households on the Help to Buy register. The majority of households have incomes under £40k with almost one third having incomes under £20k. It is relevant to note that the income required to afford a LQ property (see Section 7) is estimated to be around £68,100. This is based on the LQ price of £265k. None of the households on the register have incomes sufficient to afford a LQ property therefore. This analysis confirms that those households registered on the Help to Buy list are unable to afford market sale properties.

8.72 It is useful to consider the extent to which affordable home ownership options might be to these households:

- An LQ property at either a 30% discount (under First Homes) or 50% share (under Shared Ownership) would be affordable to households with incomes of around £47,700 (see Table 7-11 in Section 7). Based on the incomes and savings of households on the Help to Buy register, 12 households have sufficient incomes, but the data suggests none have sufficient savings for the deposit.
- An LQ property available at a 50% discount (under First Homes) or 25% share (Shared Ownership) would be affordable to households with incomes just over £34,100. Based on the incomes and savings of households on the Help to Buy register, 24 households have sufficient incomes, of which 6 also have sufficient savings for the deposit.
- Therefore, these products would extend home ownership to some of the households on the register, but the scope is limited, particularly because of deposit requirements.

8.73 As the evidence in this LHNA suggests, there is a much larger cohort of households who live in the PRS and have sufficient incomes to rent but not buy and affordable home ownership products are also likely to extend home ownership to many of these households. However, the Help to Buy analysis suggests sufficient deposits are a significant barrier to accessing home ownership and this is likely to be true in the wider population of households who cannot afford to buy in the open market. Greater discounts (e.g. 50% discount

under First Homes or 25% share under Shared Ownership) enable more households to afford, largely because they reduce the deposit requirements.

## **The Role of the Private Rented Sector**

8.74 AECOM has excluded supply from any private rented properties that would be released by households identified in this assessment. However, Lewes District Council may decide that it is appropriate to use this supply to offset need for affordable rent or affordable home ownership.

8.75 A substantial proportion of households in housing need as defined above (in both groups) are accommodated in the PRS. If households currently living in the PRS who have been identified by this assessment as potential affordable homeowners were to be able to access affordable home ownership, this would release 111 private rented properties each year. These properties could either be let to other households needing rented housing, resold on the market for owner occupation, or even sold to registered providers for letting at affordable rents. It is not possible to be certain what the precise effect would be, but the release of PRS properties will have a role in meeting overall needs.

8.76 For this reason, caution should be applied in assuming the estimates of affordable housing need justify an uplift in the delivery of housing overall because the estimates are not strictly net figures due to the release of PRS properties.

## **Overall Need for Affordable Housing**

8.77 It is estimated that there is a need for 170 affordable rented homes each year in Lewes District over the 20-year period to meet the needs of households that are unable to afford to rent privately. The estimated figure for the part of the district outside of the SDNP would be 125 households based on its share of population and dwellings.

8.78 Within the authority area, it is additionally estimated that there are 225 households each year who are able to afford market rents but are unable to access home ownership. The estimated figure for the part of the district outside of the SDNP would be 165 households based on its share of population and dwellings. This is an annualised figure which takes account of potential homeowners currently living in the private rented sector and new households likely to form in the future. These households largely aspire to home ownership, in part, to achieve greater tenure security, particularly for families, but also because of the financial stability and ability to build up equity through home ownership.

8.79 Taken together, these estimates suggest the need for 395 affordable homes per annum over the plan period in the district as a whole. The estimated figure for the part of the district outside of the SDNP would be 290 households based on its share of population and dwellings.

- 8.80 The overall housing need figure for Lewes District as calculated by the Government's Standard Method is 782 homes per annum (see Section 4). This is not the housing requirement for the District, rather the starting point for determining a requirement. The estimated need for affordable housing equates to 51% of the Standard Method figure.
- 8.81 If it were possible to deliver 395 new affordable homes each year through new development, this would release a substantial number of properties in the private rented sector which are currently occupied by households in need of affordable housing. AECOM estimate that at least 111 PRS properties would be released each year.<sup>63</sup> It is possible that some of this PRS supply could be used to accommodate households in need of affordable rented housing supported by housing benefit, or could be sold in the open market to increase the supply of properties available to potential home-owners, or sold to social landlords looking to buy up existing properties to let at affordable rents.
- 8.82 If all of the 111 PRS properties could be used to address identified affordable housing needs, the net effect would be to reduce the need for affordable housing to 284 homes per annum, equating to 36% of the Standard Method overall need figure of 782 homes per annum. It is important to emphasise that this is a theoretical illustration. However, it suggests that, even with PRS properties taken into account in supply, at least 36% of new housing provision is needed to be affordable housing.
- 8.83 A consideration emerging from this analysis is whether the estimate of the need for affordable housing should affect the District's housing requirement. It is important to make clear that the NPPF and PPG, while including an adjustment in Stage 2 of the Standard Method based on affordability ratios (as explained in section 4 of our report), do not require the housing requirement from the Standard Method to be uplifted to meet all affordable housing needs. However, the Council may wish to take the estimates of affordable housing need into account in determining their housing requirements, alongside other considerations.
- 8.84 Finally, it is worth noting that these estimates would change if the household projections are updated in line with the Census 2021. Government has set out its intention to review the projections in 2024 and this is likely to impact on the standard method results thereafter. The affordable housing estimates would also change in line with this given that new household formation is an input in the calculation of newly arising need.

## Summary

- 8.85 There are a number of observations about affordable housing needs that are worth highlighting because they shed light on the nature of need within Lewes district.

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<sup>63</sup> The figure of 111 is the estimated release of PRS properties from private renters who are potential affordable home owners. It does not include PRS properties occupied by households in need of affordable rented housing as it has not been possible to identify the number of these on the Council's Waiting List.

- 8.86 There is an estimated need for 170 affordable homes each year for households who need affordable rented accommodation in the district as a whole (estimated 125 households in the part of the district outside of the SDNP). These households are typically in acute housing need and are unable to meet their needs in the market. There is also an additional potential demand for 225 affordable homes each year for households who need affordable home ownership (estimated 165 households in the part of the district outside of the SDNP). These households are typically living in the private rented sector and would prefer to own their own home but cannot afford to buy in the open market.
- 8.87 Taken together, the need for affordable housing is estimated to be 395 homes per annum (estimate 290 in the part of the district outside of the SDNP), which equates around half of the overall Lewes district housing need figure of 782 homes per annum calculated through the Government's Standard Method (602 homes in the part of the district outside of the SDNP).
- 8.88 However, a substantial number of PRS properties (at least 111 per annum) could be released if 395 affordable homes could be delivered each year. As such, these properties could be relet or sold to meet the needs of other households and could offset the need for some affordable housing.
- 8.89 The most substantial need for affordable rented homes is for smaller (1 and 2 bed) properties, with almost three quarters of households in priority need on the Waiting List entitled to this size of property. A smaller but substantial proportion of households need homes with 3 or more bedrooms (27% of applicants in 2020/21). The availability of affordable housing for households through lettings within the stock of primarily social rented homes in Lewes is also skewed towards smaller, particularly 1-bedroom, homes. In 2018/19 (latest available data broken down by size) 88% of lettings were 1- and 2-bedroom properties. Just 12% were 3 bedroom or larger.
- 8.90 Comparing the number of households needing different sized properties to the size of homes available through lettings gives an indication of the pressure on different sized homes which is not always evident from the apparent size requirements of households on the Waiting List. The highest pressure is on 3-bedroom plus properties. In 2018/19 there were 13 households waiting for every 3-bedroom property let. For 2-bedroom homes, there were 4 applicant households waiting, and for 1-bedroom homes, 6 applicants were waiting for every available property. The pressure was greatest on larger properties and lower on smaller properties. This pattern contrasts with the high absolute need for smaller dwellings.
- 8.91 Evidence on households actively registered for affordable home ownership on the Help to Buy South register confirms that the vast majority of potential affordable home-owners currently live in the PRS. Most of those registered are smaller households and they are primarily looking for 2-bedroom homes (60% of applicants). This corresponds to the current PRS occupants, who are

households are typically younger, living in and requiring homes with 1-3 bedrooms.

- 8.92 Potential affordable home-owners are likely to have incomes of £30,000 to £68,100. This is the income range where households are able to afford market rents (income required to rent a 1 bed home is around £30,000) but unable to afford to buy a lower quartile priced property (income required to buy a LQ home is around £68,100). Data on households on the Help to Buy South register shows that most applicants have incomes under £40,000, falling within the 'can rent; can't buy' group implied by the gap between the cost of renting and buying. However, most of those registered have incomes at the lower end of the range.
- 8.93 Analysis of affordability suggests a small number of these households can afford affordable home ownership products when there are sufficient discounts. However, savings for a deposit are a key barrier and mean that most are only priced in at higher discounts because this reduces the deposit requirement.
- 8.94 The analysis in this LHNA shows the importance of pricing to ensure affordable home ownership properties meet the needs of those who can afford to rent but cannot buy. Evidence in this report suggests that discounts on open market prices need to be substantial, in order for households in the target group to be able to afford them.

## 9. Specialist Housing for Older People

### Introduction

- 9.1 This section considers in detail the specific housing needs of older people in Lewes district. It focuses on specialist forms of provision but recognises that the majority of older people will live in the mainstream housing stock. The section also explores the need for older persons' accommodation in different tenures, and briefly examines the supply of and need for care home accommodation.
- 9.2 Like most authority areas in the country, anticipated growth in Lewes district's population is expected to be led by the older population. Growth in the oldest age groups is likely to result in a rising need for housing with some level of care or support over the plan period, as the majority of households in the oldest age groups will need care or support at some point in their lives.

### What do we mean by Older People?

- 9.3 People experience ageing differently. Much depends on their health, lifestyle, and relationship with work. Some people live healthy and active lives into advanced old age while others may need support and care much earlier in their lives. Some will be interested in moving to a suitable home closer to services while for others ageing independently in place will be key to their wellbeing.
- 9.4 Our analysis presents data on people and households aged 65 and over, reflecting the traditional retirement age in the past. However, it is also relevant to examine the size of the population aged 75+ and 85+ as the need for support and care typically increases with age, with most of those in the 85+ age group likely to need care or support at some stage.
- 9.5 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. They are an idea of the broad scale of potential need rather than a requirement that must be met.

### What do we mean by Older Persons' Housing?

- 9.6 This section considers the housing needs of older people and the implications for the need for specialist housing. There is a spectrum of accommodation that might be suitable to different households, depending on their needs. Typically, different forms of specialist and mainstream housing can be distinguished between the level of care and support they provide.
- 9.7 The level of care associated with different specialist housing schemes can vary widely, and is broadly categorised, in descending order from highest to lowest care level, as follows

- Specialist schemes that have 24-hour onsite care and support, typically including onsite catering (e.g. extra care (or assisted living), flexicare, and enhanced care);
- Specialist housing that is designed with the relevant group in mind. This may be suitable for receiving care or support, but this is not typically provided onsite or at all times of day (e.g. sheltered housing); and
- Mainstream housing that is adapted or capable of adaptation so that the inhabitant can live independently and care or support can be provided in the home. Mainstream housing is not the focus of this section but can often be used as a substitute for specialist housing where appropriate support or care can be provided in the home. These overlaps need to be acknowledged.

9.8 This section primarily focuses on the need for housing, i.e. buildings that the planning system classifies as Use Class C3 (private dwellings).<sup>64</sup> Residences that fall into Use Class C2 (institutions, which can include some care homes for the elderly) are largely separate outside the scope of this research, although LDC wish to understand the likely need or demand for C2 (care homes). As such, this section considers two estimates of the likely need for residential and nursing care over the plan period.

9.9 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 section 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.

9.10 As a general guide, we consider characteristics of C3 specialist accommodation private dwellings (as opposed to C2 institutional accommodation) to usually include:

- being a self-contained dwelling (flat, house, bungalow or other), with its own front door;
- that care is made available on an individual basis with care and support staff coming to the person in their own personal dwelling;
- that residents might live in the accommodation without having care needs or accessing care / units are not only available to those who need care; and
- that units are / can be offered for sale in the open market<sup>65</sup>.

## Data Sources

9.11 When projecting need, this section of our report predominantly uses the ONS mid-year population estimates for Lewes district for the year 2020 as a baseline, instead of Census data, as this represents the start date of the Local Plan period

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<sup>64</sup> For a full description of Planning Use Classes, please refer to [https://www.planningportal.co.uk/info/200130/common\\_projects/9/change\\_of\\_use](https://www.planningportal.co.uk/info/200130/common_projects/9/change_of_use)

<sup>65</sup> See for example [Planning Use Classes and Extra Care Housing \(housinglin.org.uk\)](https://www.housinglin.org.uk)



2020-2040, and because 2011 Census data is dated and 2021 multivariate data is unlikely to be fully released before 2024 (and so tenure by age cannot be updated for 2021).

9.12 When projecting forward to the end of the plan period, the latest sub-national population projections at the time of writing are 2018-based projections published in 2020. As these population figures for 2020 and 2040 are estimates only, they do not offer the same level of certainty as Census results. However, when compared to the first early results of population figures by age from the 2021 Census, it is evident that the 2020 estimates look relatively accurate, if slightly too high:

**Table 9-1: Lewes District population by age, mid-2020 estimates and 2021 Census**

<b>Data Source</b>	<b>All ages</b>	<b>Aged 65 and over</b>	<b>Aged 75 and over</b>
<b>UK mid-2020 population estimates</b>	103,925	26,881	13,357
<b>Early Census 2021 results</b>	99,900	26,500	13,100

Source: ONS SNPP 2020, Census 2021

9.13 For some measurements, 2011 Census data was used instead of 2020 estimates, such as for data on the tenure of households aged 55-75 in the district, which is only available from this source. In a few instances where we have early release Census 2021 data, this is also included.

9.14 Another important source of information is Projecting Older people Population Information (POPPI) data<sup>66</sup>. Originally developed for the Department of Health, this source provides population data on older persons by age band, gender, ethnic group, and tenure, for English local authorities. Estimates project numbers of older people with different health and disability conditions and with various accommodation and care needs. Data was provided by POPPI as at May 2022, based on POPPI version 14.2.

## Older people in Lewes

9.15 Lewes district's current population, as per the 2021 Census, has a slightly older age profile than the wider Greater Brighton and Coastal West Sussex Market Area, and a more significant older bias compared to the population of the South East and England as a whole.

9.16 The proportion of older people aged 65+ in Lewes district is 27%, compared to 22% in the wider market area, 20% across the region, 18% across England as a whole. The proportion of the population aged 75 and older in Lewes district was 13% in 2021, compared to 9% across England. Map 9-1 also shows how the proportion of older people (aged 75+) varies across the Lewes district sub-areas.

<sup>66</sup> [Projecting Older People Population Information System \(poppi.org.uk\)](http://poppi.org.uk)

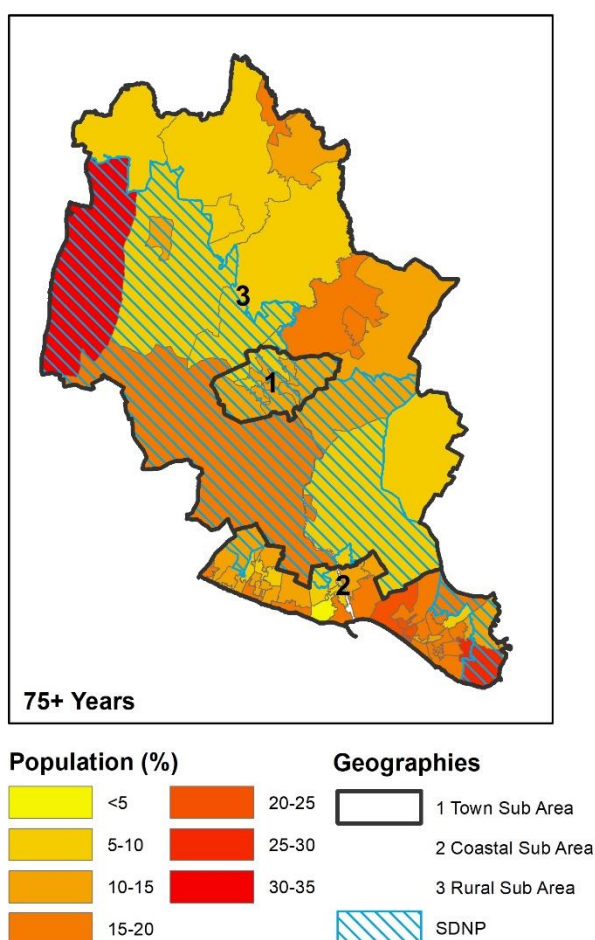
Unsurprisingly, there are higher concentration in the Coastal sub-area and pockets within the SDNP rural area.

**Table 9-2: Age Structure Lewes 2021 compared to different geographies**

<b>Geography</b>	<b>% Aged 65+</b>	<b>% Aged 75+</b>
Lewes District	27%	13%
Greater Brighton HMA	19%	9%
Greater Brighton & Coastal West Sussex Market Area	22%	11%
South East	19%	9%
England	18%	9%

Source: Census 2021

**Map 9-1: Older population (aged 75+) in Lewes District sub-areas, 2021**



Source: AECOM using Census 2021 data

9.17 Ageing of the population is experienced at similar rates across all the geographies. ONS projections suggest that the proportion of population aged 75+ will increase to 19% in Lewes district by 2040.

**Table 9-3: Lewes District population by age in 2011, 2020, 2021, and 2040**

Geography	Data Source	All ages	Aged 75 and over
Lewes	Census 2011	97,502	11,265 (12%)
	Population estimate for <b>2020</b>	103,925	13,357 ( <b>13%</b> )
	Census 2021	99,900	13,100 (13%)
	Population projection for <b>2040</b>	113,335	21,136 ( <b>19%</b> )

Source: Census 2011, ONS SNPP 2020, Census 2021

## The Scale of Need for Specialist Housing

### Estimating the need for Specialist Housing

9.18 The specialist housing needs of older people in Lewes are assessed in this LHNA using two methods. The first is a tenure-led estimate, based on rates of mobility limitation among this age group and the tenure of housing they currently occupy. The second, included for the purposes of comparison, is based on the Housing Learning and Improvement Network (HLIN) Strategic Housing for Older People (SHOP) tool,<sup>67</sup> which is based on best practice nationally and sets a recommended level of provision per 1,000 head of population.

#### Tenure-led estimate

9.19 When determining future need for specialist housing, the first step is to review data on the tenure of households aged 55-75 across Lewes district.

9.20 The 55-75 age bracket from the 2011 Census is considered the best proxy for the group likely to fall into need for specialist accommodation during the Plan period to 2040. It is assumed that those occupying their own home in 2011 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.

9.21 According to Table 9-4 below, the vast majority of those aged 55-75 in 2011 in Lewes District owned their own home (87%), mostly outright without a mortgage. Around 13% of this age group rented at the time of the last Census. This tenure is divided roughly into three quarters social renters (from the Council or other registered social landlord) and one quarter of private renters. Only a very minor percentage neither owns nor rents, and lives rent free, for example with family (0.2%).

<sup>67</sup> Available at <https://www.housinglin.org.uk/Topics/browse/HousingExtraCare/ExtraCareStrategy/SHOP/SHOPv2/>

**Table 9-4: Tenure of households aged 55-75 in Lewes District, 2011**

All owned	Owned outright	Owned with a mortgage or loan or shared ownership	All rented	Social rented	Private rented	Living rent free
<b>12,065</b>	8,479	3,586	<b>1,797</b>	1,433	341	23
<b>87.0%</b>	61.2%	25.9%	<b>13.0%</b>	10.3%	2.5%	0.2%

Source: Census 2011

9.22 To compare different geographies, we use data for households aged 65+, as sub-area data is not available for households aged 55-75 specifically. When comparing to England as a whole, Lewes district clearly has a higher proportion of residents aged 65 and over who are owner-occupiers than the national average and a lower proportion of social renters in this age group.

**Table 9-5: Tenure of households aged 65 and over in Lewes District and different geographies, 2011**

	Owned	Social rented	Private rented	Living rent free
<b>Lewes District</b>	<b>82%</b>	<b>11%</b>	<b>5%</b>	<b>2%</b>
England	74%	19%	4%	2%
Lewes inside SDNP	79%	13%	4%	2%
Lewes outside SDNP	83%	10%	5%	1%
Lewes Sub-Area - Coastal	85%	9%	4%	1%
Lewes Sub-Area - Rural	79%	12%	6%	3%
Lewes Sub-Area - Town	75%	20%	4%	2%

Source: Census 2011

9.23 Looking across the different Lewes sub-areas, the coastal sub-area has the largest percentage of home ownership amongst the older population. Lewes town has the lowest level of home ownership amongst the older population (likely because of the greater availability of social rented housing in Lewes town), significantly below the rural sub-area. Outside the SDNP home ownership is also higher than within the SDNP.

9.24 The next step is to project how the overall number of older people Lewes is likely to change in future, by comparing ONS Sub-National Population Projections for Lewes district to the end of the Plan period with estimates for 2020. The results are set out in Table 10.6 below.

9.25 Between 2020 and 2040, the older population aged 75 and over is projected to increase from around 13% to around 19% of the total population. The additional 7,779 individuals represent a 58% increase in the older population over 20 years.

**Table 9.6: Modelled projection of older population in Lewes District by end of Plan period in 2040**

Age Group	2011 Census	2020 (ONS mid-year)	2040 (ONS projection)	Increase of population aged 75+ 2020-2040
All ages	97,502	103,925	113,335	7,779 additional persons aged 75+ <b>58% increase</b>
75+	11,265	13,357	21,136	
%	11.6%	13%	19%	

Source: ONS SNPP 2020 (2018-based), AECOM Calculations

9.26 A key assumption for the next stage of the calculation is that the older people living in the district 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 other evidence e.g. from a household survey (which itself may not give a complete picture).

9.27 The people whose needs are the focus of the subsequent analysis are therefore the *additional 7,779* individuals expected to join the 75+ age group from 2020 to the end of the Plan period in 2040. This figure needs to then be converted into households, with reference to the average number of people per household with a life stage of 75+ in Lewes district in the 2011 Census. This is the most recent dataset to capture households by age.

9.28 In 2011 there were 11,265 individuals aged 75+, and 7,941 households headed by a person in that age group. The average household size is therefore 1.42, and the projected growth of 7,779 people in Lewes district can be estimated to be formed into around 5,484 additional households.

9.29 Note that POPPI<sup>68</sup> also projects that by 2040, 8,576 persons over the age of 75 will be living alone in Lewes district, compared to 5,503 in 2020, which constitutes a 56% increase.

9.30 The next step is to multiply the figure of additional households aged 75 and over by the percentages of 55-75 year olds occupying each tenure (shown in the table above). This is set out in Table 9.7 below and provides a breakdown of which tenures those households are likely to need.

<sup>68</sup> INSERT POPPI reference

**Table 9-7: Projected tenure of households aged 75+ in Lewes District to the end of the Plan period (2040)**

All Owned	Owned outright	Owned with a mortgage or loan or shared ownership	All rented	Social rented	Private rented	Living rent free
4,773	3,354	1,419	711	567	135	9

Source: ONS mid-year 2020, ONS SNPP 2020, AECOM Calculations

9.31 Next, rates of disability by tenure are considered. 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 9-8 presents this data for Lewes district from the 2011 Census. Note that the closest of the 75+ age group for which such information is available in the Census is the 65+ age group.

**Table 9-8: Tenure and mobility limitations of those aged 65+ in Lewes District, 2011**

Tenure	All categories: Long-term health problem or disability	Day-to-day activities limited a lot	Day-to-day activities limited a little	Day-to-day activities not limited			
<b>Total – All Tenures</b>	<b>21,295</b>	<b>4,420</b>	<b>20.8%</b>	<b>5,578</b>	<b>26.2%</b>	<b>11,297</b>	<b>53.1%</b>
<b>Owned or shared ownership: Total</b>	<b>18,115</b>	<b>3,394</b>	<b>18.7%</b>	<b>4,676</b>	<b>25.8%</b>	<b>10,045</b>	<b>55.5%</b>
Owned: Owned outright	16,015	2,961	18.5%	4,175	26.1%	8,879	55.4%
Owned: Owned with a mortgage or loan or shared ownership	2,100	433	20.6%	501	23.9%	1,166	55.5%
<b>Rented or living rent free: Total</b>	<b>3,180</b>	<b>1,026</b>	<b>32.3%</b>	<b>902</b>	<b>28.4%</b>	<b>1,252</b>	<b>39.4%</b>
Rented: Social rented	2,003	700	34.9%	586	29.3%	717	35.8%
Rented: Private rented or living rent free	1,177	326	27.7%	316	26.8%	535	45.5%

Source: DC3408EW Health status

9.32 It is now possible to multiply the projected number of 75+ households occupying each tenure by the rates of mobility limitation for that tenure. This produces a tenure-led estimate for specialist housing needs. The number of households falling into potential need for specialist accommodation over the Plan period in Lewes district is estimated at 2,557.

9.33 These findings are set out in Table 9-9, 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. In line with assumptions, it is estimated that slightly more households (1,434) are likely to require either adapted, sheltered, or retirement housing with more limited care or support. The remaining proportion (approximately 1,124 households) are likely to require some form of care or support to live independently.

9.34 However, it is important to note that, even this latter group of people, who will have higher 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.

**Table 9-9: AECOM estimate of specialist housing need in Lewes District by the end of the Plan period**

Type	Affordable	Market	Total (rounded)
Housing with care (e.g. extra care)	<i>Multiply the number of people across all rented (not just social rent as those aged 65+ who need to rent are overwhelmingly likely to need Affordable Housing) housing by the percent in that tenure who have day to day activity limitations limited a lot.</i>	<i>Multiply the number of people across all owned housing by the percent in that tenure who have day to day activity limitations limited a lot.</i>	<b>1,124</b>
	229	894	
Adaptations, sheltered, or retirement living	<i>Multiply the number of people across all rented housing by the percent who have day to day activity limitations limited a little.</i>	<i>Multiply the number of people across all owned housing by the percent in that tenure who have day to day activity limitations limited a little.</i>	<b>1,434</b>
	202	1,232	
<b>Total</b>	<b>431</b>	<b>2,126</b>	<b>2,557</b>

Source: AECOM Calculations



9.35 Looking in more detail at rates of disability projected for the older population in Lewes, POPPI data offers some further insight, which is summarised below (note that the following section deals in more detail with data on health problems and disability in the population as a whole in Lewes district).

9.36 Over the Plan period 2020-2040 in Lewes district, for people aged 65 or older:

- Those who need help with at least one domestic task are projected to increase by 3,547 (44%) from 8,049 to 11,596;
- Those who need help with at least one self-care activity are projected to increase by 3,428 (43%) from 7,948 to 11,376;
- Those with a limiting long-term illness are projected to increase by 2,548 (48%) from 5,309 to 7,857;
- Those who have dementia are projected to increase by 1,169 (56%) from 2,083 to 3,252;
- Those who are unable to manage at least one mobility activity (e.g. going out of doors and walking down the road; getting up and down stairs; getting around the house on the level; getting to the toilet or in and out of bed) on their own are projected to increase by 2,472 (47%) from 5,270 to 7,742; and
- Those who are predicted to have a moderate or severe learning disability, and hence likely to be in receipt of services are projected to increase by 29 (8%) from 386 to 415.

### **Housing LIN Estimated Need for Specialist Housing**

9.37 It is worth comparing these findings with the estimates derived from the Housing Learning and Improvement Network (HLIN), one of the simplest and widely used models estimating for the housing needs of older people. Instead of projecting forward based on population trends and health and disability factors, the Housing LIN model applies an 'ideal' rate of provision for different forms of accommodation to the size of the population of over 75s (see Table 9-10). These rates are based on research developed in the 'More Choice, Greater Voice report'<sup>69</sup> and can be considered best practice in the provision of specialist housing supply.

9.38 Table 9-10 below reproduces the key assumptions of HLIN's Strategic Housing for Older People (SHOP) toolkit. The table serves as a guide to the numbers of specialist dwellings for older people that should be provided, given the increase in their numbers over the Plan period, and how these should be split into the different tenures.

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<sup>69</sup> [More Choice, Greater Voice - a toolkit for producing a strategy for accommodation with care for older people - Resource Library - Resources - Housing LIN](#)



**Table 9-10: Recommended provision of specialist housing for older people from the SHOP toolkit**

<i>Form of Provision</i>	<i>Estimate of Demand per thousand of the relevant 75+ Population</i>
<i>Conventional sheltered housing to rent</i>	60
<i>Leasehold sheltered housing</i>	120
<i>Enhanced sheltered housing (divided 50:50 between that for rent and that for sale)</i>	20
<i>Extra care housing for rent</i>	15
<i>Extra care housing for sale</i>	30
<i>Housing based provision for dementia</i>	6

Source: *Housing LIN SHOP Toolkit*

9.39 In total, the HLIN model suggests that in most places, the level of unmet demand for specialist housing for older people of all kinds is likely to be approximately 251 units per 1,000 of the population aged 75+, with roughly half of these (120), requiring leasehold sheltered housing and similar, such as adapted existing housing or retirement accommodation without significant onsite care offers.

9.40 As with AECOM's estimates, this does not include the need for care homes (residential or nursing) which is examined separately, later in this section.

9.41 As Table 9-6 shows, Lewes district is forecast to see an increase of 7,779 individuals aged 75+ by the end of the Plan period in 2040, compared to the start of the plan period in 2020. Note that the HLIN SHOP toolkit projects demand on the basis of the size of the population rather than the number of households. According to the HLIN tool, this translates into need as follows:

- Conventional sheltered housing to rent =  $60 \times 7.78 = 467$   
(Note that the 7.78 stands for the 7,779 additional older people divided by 1,000, as the Housing LIN SHOP Toolkit is based on provision per 1,000 population)
- Leasehold sheltered housing =  $120 \times 7.78 = 933$
- Enhanced sheltered housing (divided 50:50 between that for rent and that for sale) =  $20 \times 7.78 = 156$
- Extra care housing for rent =  $15 \times 7.78 = 117$
- Extra care housing for sale =  $30 \times 7.78 = 233$
- Housing based provision for dementia =  $6 \times 7.78 = 47$

9.42 This produces an overall total of 1,953 specialist dwellings which might be required from the beginning of the plan period in 2020 to the end of the plan period in 2040.

9.43 Table 9-11 sets out the HLIN recommendations in the same format as AECOM estimate above. It is important to stress that the SHOP toolkit embeds assumptions that uplift the provision of specialist accommodation compared to current rates.

**Table 9-11: HLIN estimate of specialist housing need in Lewes District by the end of the Plan period**

Type	Affordable	Market	Total
Housing with care (e.g. extra care)	Includes: enhanced sheltered housing for rent + extra care housing for rent + housing based provision for dementia	Includes: enhanced sheltered housing for sale + extra care housing for sale	<b>552</b>
	241	311	
Sheltered housing	Conventional sheltered housing for rent	Leasehold sheltered housing	<b>1,400</b>
	467	933	
<b>Total</b>	<b>708</b>	<b>1,245</b>	<b>1,953</b>

Source: Housing LIN, AECOM calculations

9.44 The AECOM and HLIN SHOP toolkit suggest there is need for between 1,953 - 2,557 specialist homes for older people over the plan period. It is important to emphasise:

- The need or demand for these homes falls within the overall need for housing; it is not additional to the need for homes identified through the Standard Method.
- These figures are estimates based on a range of assumptions. This is not a precise science. Rather, it is a useful indication of the potential scale of need or demand for specialist accommodation based on the age and likely health needs of the population.
- The needs of these households may be met by other forms of housing or accommodation. Some households may be accommodated within mainstream housing, particularly if they have limited care and support needs. Ideally, mainstream housing would be built to standards that support the needs of older people (e.g. accessible and adaptable) or adapted to meet their specific needs. Some households with higher care and support needs, who are identified above as needing 'housing with care' e.g. extra care/ assisted living, might be accommodated instead in residential care homes. However, this is unlikely to be desirable as it does not constitute independent living and is likely to be significantly more costly, but may be the only option available to some households or individuals if mainstream housing or specialist accommodation cannot be provided at a sufficient scale and in the right locations.

## Current Supply of Specialist Housing for Older People

- 9.45 When considering the potential need for specialist accommodation, it is relevant to take account of current supply in Lewes district. Information on the current stock is collated manually using the search function on the Elderly Accommodation Counsel's Website: <http://www.housingcare.org>.
- 9.46 Table 9-12 counts a total of 52 current schemes, with 1,996 units of specialist accommodation in the local authority area at present, which includes one scheme of 10 leasehold flats imminently forthcoming. Most of these specialist units are flats, but some schemes also provide some bungalows and houses.
- 9.47 Just under half of these schemes (23 of 52), providing the majority of units (about 1,034 of the total 1,996) are offering accommodation for leasehold or freehold market purchase. 28 of 52 schemes offer approximately 896 units for rent by a social landlord or charity for those in financial need. Three schemes also include units for market rent (around 36 units). Note that the number of units per tenure are not exact, as some schemes include a mix of tenures and do not state the number of units related to each. However, we can ascertain an approximately split as follows:
- 52% of units for leasehold/freehold sale;
  - 45% for social rent or allocation by a charity; and
  - 2% for private rent.
- 9.48 Unit sizes are primarily a mix between studios, one bed, and two bed units, with three scheme also offering some three-bedroom accommodation.
- 9.49 79% of the existing offer (47 of the 51 schemes, or 1,573 of 1,996 total units) is retirement or age exclusive housing with no on-site care offer. Only five of the total 52 schemes (20% or 392 units) are marked on the Housing Care website as offering "Housing-with-Care" or "Extra Care Housing".
- 9.50 ONS 2020 population estimates suggested that there were around 13,357 individuals aged 75 or over in Lewes district in 2020. The Census 2021 shows a population of those aged 75 and over of 13,100 individuals. Therefore, the 2020 estimate is likely to be broadly of the right magnitude but slightly too high.
- 9.51 Based on the 2021 Census figure, we estimate that the current provision of 1,996 units in Lewes district equates to in the region of 152 units per 1,000 of the 75+ population (a common measure of specialist housing supply). This can be compared to the level of provision recommended by the Housing Learning and Improvement Network model, which is 251 units per 1,000 population. Our analysis therefore shows a significant current under-provision in Lewes district compared to the 'ideal' rates in the Housing LIN model, as is the case in most locations around the country.

**Table 9-12: Existing specialist housing for the Older People in Lewes District**

	Name	Description	Units	Tenure	Type
1	Ashleigh Glegg House	30 flats. Sizes studio, 2 bedroom. Resident management staff and Careline alarm service; Lounge, Laundry, Guest facilities, Garden; Frequent Social activities organised by scheme manager and residents. New residents accepted from 60 years of age.	30	Rent (Social Landlord)	Retirement Housing
2	Caburn Court	37 flats. Sizes 1 bedroom, 2 bedroom. Non-resident management staff (part time) and Careline alarm service Lift, Lounge, Laundry, Guest facilities, Garden, kitchen; Whole site accessible by wheelchair. Regular Social activities organised by residents. New residents accepted from 60 years of age.	37	Leasehold	Retirement Housing
3	Cavell Avenue	36 bungalows. Sizes 2 bedroom. Scheme for, or of particular interest to: people put forward ('nominated') by a London Borough. New residents accepted from 60 years of age.	36	Rent (Social Landlord)	Age Exclusive Housing
4	Cheneys Lodge	35 flats. Sizes 1 bedroom, 2 bedroom. Non-resident management staff and Careline alarm service; Lift, Lounge, Restaurant open to the public, Garden, Hairdressing salon New residents accepted from 55 years of age.	35	Rent (Social Landlord)	Retirement Housing
5	Churchill House	23 flats. Sizes studio, 1 bedroom, 2 bedroom. Includes mobility standard properties. Non-resident management staff and Careline alarm service; Lift, Stair lift(s), Lounge, Laundry, Guest facilities, Garden, kitchen/dining area; Whole site accessible by wheelchair. Monthly Social activities organised by residents and scheme manager. New residents accepted from 60 years of age.	23	Rent (Social Landlord)	Retirement Housing
6	Clevedown	67 flats. Sizes studio, 1 bedroom. Non-resident management staff and Careline alarm service; Lift, Lounge, Laundry, Guest facilities, Garden, Library; Whole site accessible by wheelchair; New residents accepted from 60 years of age.	67	Rent (Social Landlord)	Retirement Housing
7	Coldstream House	22 flats. Sizes 1 bedroom, 2 bedroom. Non-resident management staff and Careline alarm service; Lift, Lounge, Laundry, Garden, kitchen/dinning area; Whole site accessible by wheelchair. Regular Social activities organised by tenants and scheme manager. New residents accepted from 60 years of age.	22	Rent (Social Landlord)	Retirement Housing
8	Croft Court	15 flats, bungalows, houses. Sizes 1 bedroom, 2 bedroom. Non-resident management staff (part time) and Careline alarm service Lift, Garden. Regular Social activities. New residents accepted from 60 years of age.	15	Leasehold and Rent (market)	Retirement Housing
9	Delves House	56 flats. Sizes 1 bedroom, 2 bedroom.	56	Leasehold	Retirement Housing

		Resident management staff and Careline alarm service; Lounge, Laundry, Guest facilities, Garden; New residents accepted from 55 years of age.			
10	Dorothy House	17 flats. Extra Care scheme with on-site care staff, Non-resident management staff and Careline alarm service; Lift, Lounge, Dining room, Laundry, Garden, Conservatory; Meal(s) available	17	Rent (Social Landlord)	Housing-With-Care
11	Downland Estate	43 bungalows. Sizes 1 bedroom, 2 bedroom. Includes mobility standard properties. Non-resident management staff and Careline alarm service; Whole site accessible by wheelchair; Regular Social activities organised by tenants and scheme manager. New residents accepted from 60 years of age.	43	Rent (Social Landlord)	Retirement Housing
12	Downlands Court	41 flats. Sizes 1 bedroom, 2 bedroom. Extra Care scheme with on-site care staff (24 hours / 7 days), Non-resident management staff (24 hours) and Careline alarm service Lift, Lounge, Restaurant open to the public, Laundry, Guest facilities, Garden, Activities room, Cafe, Shop, Hairdressing salon, Library, Assisted bathing facility; Whole site accessible by wheelchair. Regular Social activities. New residents accepted from 60 years of age.	41	Rent (social landlord) and Shared Ownership	Extra Care Housing
13	Dumbrells Court	34 flats, bungalows, houses. Sizes 2 bedroom, 3 bedroom. Includes mobility standard properties. Resident management staff and Careline alarm service; Stair lift(s), Laundry, Garden, Conservatory; New residents accepted from 55 years of age.	34	Leasehold	Retirement Housing
14	Ellis Gordon House	46 flats. Sizes studio, 1 bedroom. Includes mobility and wheelchair standard properties. Resident management staff and Careline alarm service; Lift, Lounge, Laundry, Guest facilities, Garden; Whole site accessible by wheelchair. Weekly Social activities organised by residents' social club and manager. New residents accepted from 55 years of age.	46	Rent (Social Landlord)	Retirement Housing
15	Essex Mews	21 flats. Sizes studio, 1 bedroom. Includes mobility and wheelchair standard properties. Non-resident management staff (part time) and Careline alarm service Garden; New residents accepted from 60 years of age.	21	Leasehold	Age Exclusive Housing
16	Eversley Court	51 flats. Sizes 1 bedroom, 2 bedroom. Retirement Living Plus scheme with on-site care staff (24 hours / 7 days), Non-resident management staff (24 hours, 7 days) and Careline alarm service; Lift, Lounge, Dining room, Laundry, Guest facilities, Garden; Meal(s) available. New residents accepted from 70 years of age.	51	Leasehold	Extra Care Housing
17	Falfield	9 flats. Built in 2001. Sizes 1 bedroom, 2 bedroom. Includes mobility and wheelchair standard properties. Non-resident management staff and Careline alarm service; Lift, Garden; Whole site accessible by wheelchair. Scheme for, or of particular interest to: disabled people, for whom ground floor flats are reserved. Regular Social activities organised by Scheme Manager. New residents accepted from 60 years of age.	9	Rent (market)	Retirement Housing

18	Gradwell Park	65 flats, bungalows. Non-resident management staff and Careline alarm service; Lift, Lounge, Dining room, Laundry, Guest facilities, Garden, Hobby room, Activities room, Shop, Hairdressing salon, Bar/pub, Library, allotments, parking facilities; Social activities. New residents accepted from 60 years of age.	65	Leasehold	Retirement Housing
19	Gratham Close	37 flats. Sizes 1 bedroom, 2 bedroom. Includes mobility standard properties. Non-resident management staff and Careline alarm service; Lounge, Laundry, Guest facilities, Garden, Community centre; This almshouse charity caters for: primarily residents of retirement age, of limited financial means and living within the vicinity of the Almshouse charity, who are able to live independently; Monthly Social activities. New residents accepted from 50 years of age.	37	License	Retirement Housing
20	Greyfriars Court	43 flats. Sizes 1 bedroom, 2 bedroom. Includes mobility and wheelchair standard properties. Very Sheltered scheme with Non-resident management staff (24 hours, 7 days) and Careline alarm service; Lift, Lounge, Dining room, Restaurant open to the public, Laundry, Guest facilities, Garden, Hobby room. Meal(s) available	43	Leasehold	Housing-with-Care
21	Guinness Court	20 flats. Sizes 1 bedroom. Non-resident management staff and Careline alarm service; Lounge, Laundry, Guest facilities; New residents accepted from 60 years of age.	20	Rent (social landlord)	Retirement Housing
22	Havenside Court	20 flats. Sizes 1 bedroom. Includes mobility standard properties. Non-resident management staff (part time) and Careline alarm service Lift, Garden; Whole site accessible by wheelchair. Regular Social activities organised by Manager. New residents accepted from 60 years of age.	20	Leasehold	Retirement Housing
23	Homecoast House	34 flats. Sizes 1 bedroom, 2 bedroom. Resident management staff and Careline alarm service; Lift, Lounge, Laundry, Guest facilities, kitchen; Weekly Social activities organised by residents, house manager. New residents accepted from 60 years of age.	34	Leasehold	Retirement Housing
24	Homeridge House	75 flats. Sizes 1 bedroom, 2 bedroom. Includes mobility and wheelchair standard properties. Resident management staff and Careline alarm service; Lift, Lounge, Laundry, Guest facilities, Garden, kitchen; Whole site accessible by wheelchair. Weekly Social activities organised by residents. New residents accepted from 60 years of age.	75	Leasehold	Retirement Housing
25	Homeshore House	48 flats. Sizes 1 bedroom, 2 bedroom. Non-resident management staff (part time) and Careline alarm service; Lift, Lounge, Laundry, Guest facilities, Garden, kitchen; Monthly Social activities organised by residents social committee. New residents accepted from 60 years of age.	48	Leasehold	Retirement Housing
26	Hometye House	43 flats. Sizes 1 bedroom, 2 bedroom. Visiting management staff (House Manager works 9am to 3pm), Non-resident management staff (part time) and Careline alarm service	43	Leasehold	Retirement Housing

		Lift, Lounge, Laundry, Guest facilities, Garden, kitchen; Weekly Social activities organised by social committee. New residents accepted from 60 years of age.			
27	Hortsley	38 flats. Sizes 1 bedroom, 2 bedroom. Lounge, Guest facilities, Conservatory; New residents accepted from 60 years of age.	38	Leasehold and Rent (market)	Retirement Housing
28	Iveagh Crescent	20 flats. Sizes 1 bedroom. Resident management staff and Careline alarm service; New residents accepted from 60 years of age.	20	Rent (Social Landlord)	Retirement Housing
29	Leighside House	29 flats. Sizes 1 bedroom, 2 bedroom. Includes mobility and wheelchair standard properties. Non-resident management staff and Careline alarm service; Lift, Lounge, Laundry, Garden; Frequent Social activities organised by residents, warden. New residents accepted from 60 years of age.	29	Rent (Social Landlord)	Retirement Housing
30	Martlet House	40 flats. Sizes studio, 1 bedroom. Non resident management staff and careline alarm service; Lounge; Laundry, Guest facilities. New residents accepted from 65 years of age.	40	Rent (social landlord)	Retirement housing
31	Meridian Court	34 flats. Sizes studio, 1 bedroom. Includes wheelchair standard properties. Non-resident management staff and Careline alarm service; Lift, Lounge, Laundry, Garden, Activities room, kitchen/dining area, snooker room; Whole site accessible by wheelchair. Weekly Social activities organised by scheme manager and tenants. New residents accepted from 60 years of age.	34	Rent (Social Landlord)	Retirement Housing
32	Merryfield Court	32 flats. Sizes 1 bedroom, 2 bedroom. Resident management staff and Careline alarm service; Lift, Lounge, Laundry, Guest facilities, Garden, kitchen; Weekly Social activities organised by social committee. New residents accepted from 60 years of age.	32	Leasehold	Retirement Housing
33	Mill Road & Close	31 bungalows. Sizes studio, 1 bedroom, 2 bedroom, 3 bedroom. Non-resident management staff and Careline alarm service; Lounge, Laundry, Guest facilities, Garden, kitchen; Regular Social activities organised by tenants and scheme manager. New residents accepted from 60 years of age.	31	Rent (Social Landlord)	Retirement Housing
34	Mitchell House	38 flats. Sizes 1 bedroom, 2 bedroom. Resident management staff and Careline alarm service; Lift, Lounge, Laundry, Guest facilities, Garden, Activities room, level access shower room; Regular Social activities organised by Social Club and manager. New residents accepted from 60 years of age.	38	Rent (Social Landlord)	Retirement Housing
35	Neills Close	32 bungalows. Sizes 1 bedroom, 2 bedroom. Includes wheelchair standard properties. Non-resident management staff and Careline alarm service; Laundry, large communal garden with shed and furniture; Regular Social activities organised by tenants and scheme manager. New residents accepted from 60 years of age.	32	Rent (Social Landlord)	Retirement Housing
36	Neville Lodge	31 flats. Sizes 1 bedroom, 2 bedroom.	31	Leasehold	Retirement Housing

		Non-resident management staff and Careline alarm service; Lift, Lounge, Laundry, Guest facilities, Garden			
37	Newick Scheme	26 bungalows. Sizes 1 bedroom, 2 bedroom. Non-resident management staff and Careline alarm service; Lounge, Laundry, Garden, kitchen; Regular Social activities organised by tenants. New residents accepted from 60 years of age.	26	Rent (Social Landlord)	Retirement Housing
38	Newton Road	25 flats, bungalows. Sizes 1 bedroom, 2 bedroom. Non-resident management staff and Careline alarm service; Lounge, Laundry, Guest facilities, Garden, kitchen and dining area; Weekly Social activities organised by tenants. New residents accepted from 60 years of age.	25	Rent (Social Landlord)	Retirement Housing
39	Old Ben Homes	40 bungalows. Sizes 1 bedroom, 2 bedroom. Resident management staff, Non-resident management staff and Careline alarm service; Lounge, Garden; This almshouse charity caters for: people from the news trade, News Agents and associated trades, who are retired. Weekly Social activities organised by residents.	40	Rent (Social Landlord)	Retirement Housing
40	Pondsye Court	32 flats. Built in 1994. Sizes 1 bedroom, 2 bedroom. Non-resident management staff and Careline alarm service; Lift, Lounge, Laundry, Guest facilities, Hobby room, kitchenette, small courtyard; Access to site fairly easy, but less so for less mobile people. Distances: bus stop 10 yards; shop 0.25 mile(s); post office 0.5 mile(s); town centre 0.5 mile(s); GP 0.5 mile(s); social centre 0.25 mile(s). Social activities include: bingo, darts, cream teas and lunches, outings for meals etc (by minibus), and ad hoc events. New residents accepted from 60 years of age.	32	Leasehold	Retirement Housing
41	Rathan Court	27 flats. Sizes studio, 1 bedroom, 3 bedroom. Includes wheelchair standard properties. Non-resident management staff and Careline alarm service; Lift, Lounge, Laundry, Guest facilities, Garden, kitchen/dining area Whole site accessible by wheelchair; Monthly Social activities. New residents accepted from 60 years of age.	27	Rent (Social Landlord)	Retirement Housing
42	Reed Court	25 flats, bungalows. Sizes studio, 1 bedroom, 2 bedroom. Non-resident management staff and Careline alarm service; Lift, Lounge, Laundry, Garden, kitchen/dining area; Whole site accessible by wheelchair. Regular Social activities organised by Tenants. New residents accepted from 60 years of age.	25	Rent (Social Landlord)	Retirement Housing
43	Seaford House	27 flats. Sizes studio, 1 bedroom. Non-resident management staff and Careline alarm service; Lift, Lounge, Laundry, Garden, kitchen/dining area; Whole site accessible by wheelchair. Weekly Social activities organised by tenants and scheme manager. New residents accepted from 60 years of age.	27	Rent (Social Landlord)	Retirement Housing
44	Southdown Avenue / Arundel Road	23 bungalows. Sizes 1 bedroom, 2 bedroom. Includes mobility standard properties; Non-resident management staff and Careline alarm service; Whole site accessible by wheelchair.	23	Rent (Social Landlord)	Retirement Housing

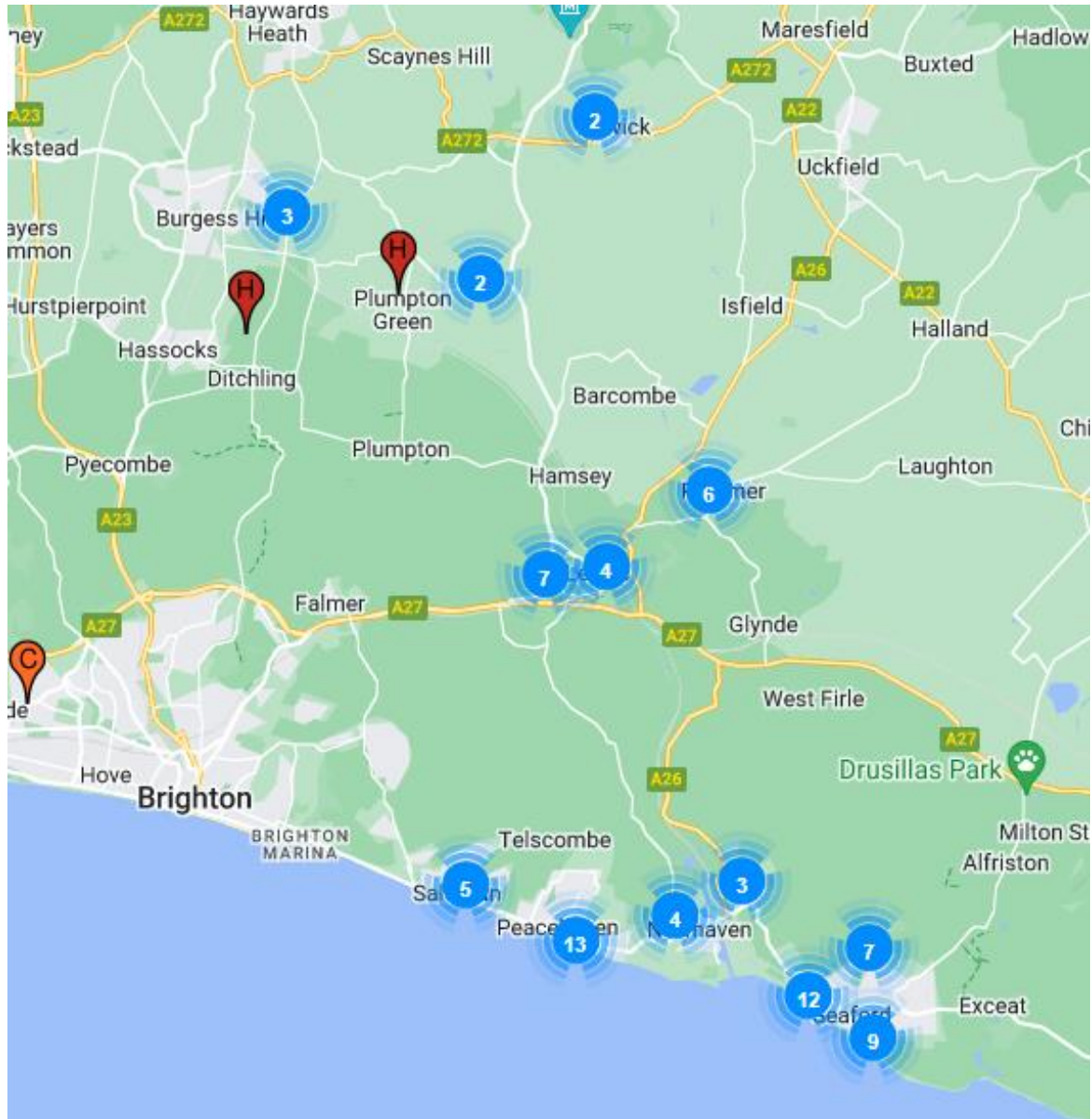


		Regular Social activities organised by tenants and scheme manager. New residents accepted from 60 years of age.			
45	St Davids Court	36 flats. Sizes studio, 1 bedroom, 2 bedroom. Includes mobility and wheelchair standard properties. Non-resident management staff and Careline alarm service; Lift, Stair lift(s), Lounge, Dining room, Laundry, Guest facilities, Garden, Activities room, kitchen/dining area; Whole site accessible by wheelchair. Weekly Social activities organised by tenants and scheme manager. New residents accepted from 60 years of age.	36	Rent (Social Landlord)	Retirement Housing
46	St George's Park	240 flats. Sizes 1 bedroom, 2 bedroom. Includes mobility and wheelchair standard properties. Independent Living scheme with on-site care staff, Non-resident management staff and Careline alarm service; Lift, Lounge, Restaurant open to the public, Laundry, Guest facilities, Garden, Hobby room, Activities room, Shop, Hairdressing salon, Bar/pub, Library, bowling green, concert hall, fishing lake; Whole site accessible by wheelchair. Regular Social activities organised by residents and hospitality staff. Meal(s) available (in restaurant). New residents accepted from 60 years of age.	240	Leasehold	Housing-With-Care
47	St Thomas Court	43 flats. Sizes 1 bedroom, 2 bedroom. Resident management staff and Careline alarm service; Lounge, Laundry	43	Leasehold	Retirement Housing
48	Stratheden Court	75 flats. Built in 1984. Sizes 1 bedroom, 2 bedroom. Non-resident management staff (part time) and Careline alarm service Lift, Lounge, Laundry, Guest facilities; New residents accepted from 60 years of age.	75	Leasehold	Age Exclusive Housing
49	Sussex House	26 flats. Sizes 2 bedroom. Scheme for, or of particular interest to: people put forward ('nominated') by a London Borough. New residents accepted from 60 years of age.	26	Rent (social landlord)	Age Exclusive Housing
50	Vicarage Close	15 flats. Sizes studio, 1 bedroom, 2 bedroom; Resident management staff (part time) and Careline alarm service; Stair lift(s), Lounge, Laundry, Guest facilities, Garden; New residents accepted from 60 years of age.	15	Leasehold	Age Exclusive Housing
51	Winterbourne Lodge	33 flats, bungalows, houses. Built in 1984. Sizes 1 bedroom, 2 bedroom. Resident management staff and Careline alarm service; Laundry, Guest facilities, Garden; New residents accepted from 55 years of age.	33	Leasehold and Freehold	Retirement Housing
52	<i>Forthcoming Development at Strawlands, off Station Road, Lewes BN7 3DB</i>	<i>10 flats. Sizes 1 bedroom, 2 bedroom. New residents accepted from 55 years of age.</i>	<i>10</i>	<i>Leasehold</i>	<i>Age Exclusive Housing</i>
<b>TOTAL UNITS</b>					<b>1,996 units</b>

Source: <http://www.housingcare.org>

9.52 In terms of spatial distribution of this accommodation offer, the map below shows that the majority of such accommodation is offered in the coastal sub-area, with more located in the urban than the rural parts of the District, and more outside the SDNP than inside it. The most popular location appears to be in and around Seaford and Peacehaven.

**Figure 9-1: Location of existing specialist housing for the older people in Lewes**



Source: <http://www.housingcare.org>

## The Role of Mainstream Housing

- 9.53 The majority of older people live in mainstream housing and will continue to do so, all of their lives. Analysis of existing specialist housing and care home accommodation in this section suggests there are 1,996 specialist housing units and 916 care home beds (more detail on care home accommodation is provided later in this section). By implications, around 78% of the current population aged 75 or over is likely to live in the mainstream housing stock.<sup>70</sup>
- 9.54 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 it. This is because older people are expected to fund their own care and support if they can afford to (eligibility for support from ESCC is set out in the Care Act). Lower income older people qualify for funding from ESCC and can be supported in their own homes
- 9.55 An indication of the scale of care and support within the mainstream sector is the scale of informal care, or unpaid care, provided by family members, including by people aged over 65. POPPI data suggests that 3,962 persons aged 65 and over in Lewes district currently provide unpaid care to a partner, family member or other person. This is projected to rise to by an additional 1,345 individuals over the coming 20-year period, to 5,307 in 2040.
- 9.56 The scale of need for support and care in the mainstream housing sector and the fact that the vast majority of older people live in and will remain living in mainstream housing suggests that the suitability of new homes in Lewes district for older people will have an important impact on the health and wellbeing of older people in the district.
- 9.57 The currently adopted Core Policy 2 Clause 4 (in the Joint Core Strategy 2010-2030 – Local Plan Part 1) states that “where appropriate, the LPA will identify sites and requirements for special needs housing (e.g. nursing homes, retirement homes, people with special needs including physical and learning disabilities, specific requirements of minority groups etc) in Site Allocations & Development Management Policies DPD and SDLP”. There is no policy within the development plan (neither in Local Plan part 1, nor in Lewes Local Plan Part 2: Site allocations and development management policies) which explicitly provides encouragement or makes requirements for development to accommodate specific groups such as older people. There are also no specific targets set for the proportion of new housing that might be required to meet national standards for accessibility and adaptability (Category M4(2)), or for wheelchair users

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<sup>70</sup> The 2021 Census captures 13,100 over 75s in Lewes; 1,996 persons are accommodated in specialist elderly housing units in Lewes and care homes accommodate a further 916 persons, leaving 10,188 people living in mainstream housing. This is approximate since some people in specialist housing and care homes will be under the age of 75.

(Category M4(3)). The evidence gathered here could justify applying such a target in the new Local Plan if this is a strategic priority of the LPA.<sup>71</sup>

9.58 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, and the evidence gathered here would further justify this. Whilst not all buyers of new homes will need M4(2) standards when they purchase or rent a home, they may need the accessibility and adaptability features in later life. In the market sector, it is also difficult to ensure accessible homes are available to those that need them. For this reason, the AECOM team's view is that all new mainstream housing should be built to M4(2) standards to ensure that sufficient homes are available to the people that need them over time. There may be some exceptions to this general aim, depending on the specific circumstances of a scheme. However, sufficient flexibility can be set out in policy whilst also setting the expectation that all new build housing should meet these standards.

9.59 The proportion of new housing that might accommodate those using wheelchairs (M4(3)) might be set with reference to the proportion of affordable housing applicants falling into this category (LDC's Waiting List) or the proportion of wheelchair users in the population as a whole. Table 9-13 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). If these percentages are applied to the housing need figure for Lewes (District as a whole), this would imply the delivery of 5-23 wheelchair accessible homes each year. However, discussions with LDC housing officers suggests the existing stock of wheelchair accessible accommodation is limited in the social/affordable rented sector. This might justify boosting the provision of new wheelchair accessible homes in this sector through new development.

**Table 9-13: Wheelchair use Nationally Applied to Lewes**

	Percentage in England	% applied to LDC District wide housing need figure (782 pa)	% applied to part of Lewes District outside SDNP (602 pa)
Households using wheelchair all the time	0.6%	5	4
Households using wheelchair either indoors or outdoors	3.0%	23	18

*Source: Survey of English Housing 2018/19, LDC housing need figure (Section 4 of this LHNA)*

<sup>71</sup> Note that Government has set out intention to include M4(2) standards in building regulations as standard rather than as an option. AECOM to review status of this policy when draft report is finalised.

## The Need for Care Home Accommodation

9.60 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.

9.61 However, residents of care homes may be similar in terms of their care and support needs to 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 some 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.

9.62 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.

9.63 AECOM has included three estimates, to explore the likely range of need for care home accommodation over the plan period in the district as a whole:

- The **HLIN SHOP toolkit prevalence rates** for residential and nursing care homes for older people (aged 75+) estimate applies the prevalence rates in the 'More Choice, Greater Voice' 2008 report. This informed the development of the HLIN toolkit. The report suggested that 65 residential care beds per 1,000 people aged 75+ is an appropriate rate of provision. For nursing care beds, the provision rate proposed was 45 per 1,000 people aged 75+. Figure 9-14 summarises this estimate applied to Lewes population estimates for 2020 and 2040, which results in a need for 855 additional care home beds (with or without nursing) over the plan period.
- **AECOM's estimate** uses the number and rate of older people living in residential and nursing care homes in 2011 (based on the population in these institutions) and projects this forward to the population over the plan period 2020-2040. In 2011, 397 people aged 75 and over were residents in residential care homes and a further 254 lived in nursing care homes (this includes residents in local authority and other care establishments). This represents a rate of 3.5% and 2.3% of the total population of over 75s in 2011 (11,265). These rates are then applied to the projected population of over 75s in 2020 and 2040, to estimate the number of care home beds that might be required in the plan period. This equates to 470 care home beds needed in 2020 and 745 in 2040; and 301 nursing care home beds in 2020 and 477

in 2040. Together, this sums up to a total of 771 beds needed in 2020 and 1,222 in 2040, implying an increase of 451 additional beds needed over the plan period.

- **POPPI data** also estimates that the current population aged 75 and over living in care homes with or without nursing in Lewes is 761 in 2020, projected to rise to 1,257 in 2040, implying an increase of 496 additional persons needing care home beds over the 20-year plan period.

9.64 Figure 9-14 compares the results of the three different approaches. This shows that the latter two approaches produce a similar scale estimate of need for care home accommodation over the plan period. Applying the recommended HLIN prevalence rates estimates a higher scale of need. The range of estimates suggests the need for between 23-43 additional care homes beds with or without nursing per annum over the 20 year plan period.

**Figure 9-14: Estimates of Need for Care Home Beds for residents aged 75+, Lewes 2020-2040**

Estimate	Current provision	2020	2040	Change 2020-2040	Per annum
<b>HLIN based (total)</b>	<b>962</b>	<b>1,469</b>	<b>2,324</b>	<b>855</b>	<b>43</b>
- Residential care	507	868	1,373	505	25
- Nursing care	455	601	951	350	18
<b>AECOM (total)</b>	<b>962</b>	<b>771</b>	<b>1,222</b>	<b>451</b>	<b>23</b>
- Residential care	507	470	745	275	14
- Nursing care	455	301	477	176	9
<b>POPPI (total)</b>		<b>761</b>	<b>1,257</b>	<b>496</b>	<b>25</b>

*Source: HLIN rates taken from More Choice Greater Voice 2008 report (Table 23, paras 44-45); AECOM estimates based on rate of residential and nursing care bed use in population aged 75+ in 2011; and POPPI rates taken from data produced by POPPI on 24/05/22 from [www.poppi.org.uk](http://www.poppi.org.uk) version 14.2 .*

9.65 It is important to note that as these estimates relate to care and nursing homes (or the population aged 75+ in institutions) rather than independent housing, these figures are in addition to the overall need for housing in Lewes district. However, as discussed in this section, some of the need for care and nursing home beds might be met by independent housing accommodation and vice versa.

9.66 These estimates can be supplemented with information on the current supply of care home bed spaces in Lewes. There are currently 28 schemes licenced, with a total of 946 beds in 893 rooms. Table 9-14 includes the current provision

alongside the estimate need in 2020 and at the end of the plan period (2040). This shows that, under AECOM's estimate, current care home provision is sufficient to meeting needs in 2020, but will need to grow to accommodate needs in 2040. The HLIN estimate suggests there is under provision in 2020, however, with further growth needed for 2040.

9.67 About 57% of currently available bed spaces (537 of the total 916) are in Care Homes and the remaining 43% (409 bed spaces) are in Care Homes offering Nursing Care.



**Table 9-15: Existing care home bed spaces for older people in Lewes**

	<b>Name</b>		<b>Accommodation</b>	<b>Beds</b>	<b>Rooms</b>	<b>Type</b>
1	Abundant Nursing Home	Grace	Conditions cared for: Older people generally / People with dementia Care period: Long stay.	67	67	Care Home / Care Home with Nursing
2	Barons Down Nursing Home		Conditions cared for: Older people generally / People with physical difficulties Care period: Long stay / Respite care stay.	24	21	Care Home with Nursing
3	Beachlands Home Ltd	Care	Conditions cared for: Older people generally Care period: Trial stay / Day visit / Long stay / Respite care stay.	29	28	Care Home
4	Blatchington Manor		Conditions cared for: Older people generally / People with dementia Care period: Long stay / Respite care stay.	43	43?	Care Home
5	Burdyke Lodge		Conditions cared for: Older people generally Care period: Long stay / Respite care stay.	21	18	Care Home
6	Claremont House Rest Home		Conditions cared for: Older people generally Care period: Long stay / Respite care stay.	19	17	Care Home
7	Claydon House		Conditions cared for: Older people generally Care period: Trial stay / Long stay / Respite care stay.	32	32?	Care Home
8	Clifden Dementia Care Centre	House	Conditions cared for: Older people generally / People with dementia Care period: Trial stay / Long stay / Respite care stay.	54	47	Care Home
9	Cliff Court		Conditions cared for: People with dementia Care period: Trial stay / Long stay / Respite care stay.	18	15	Care Home
10	Crowborough Lodge		Conditions cared for: Older people generally Care period: Long stay / Respite care stay.	31	27	Care Home
11	Fairlight Manor		Conditions cared for: People with dementia Care period: Long stay / Respite care stay.	19	12	Care Home



12	Freshford Cottage Nursing Home	Conditions cared for: Older people generally Care period: Trial stay / Long stay / Respite care stay.	20	13	Care Home with Nursing
13	Haven Care Home	Conditions cared for: Older people generally / People with physical difficulties Care period: Trial stay / Long stay / Respite care stay.	40	40	Care Home with Nursing
14	Holm Lodge Residential Home	Conditions cared for: Older people generally Care period: Trial stay / Day visit / Long stay / Respite care stay.	26	26	Care Home
15	Lime Tree House Residential Care Home	Conditions cared for: Older people generally Care period: Long stay.	30	30	Care Home
16	Nightingales	Conditions cared for: Older people generally / People with physical difficulties / People with sensory impairments Care period: Long stay.	22	22	Care Home
17	North Corner	Conditions cared for: Older people generally / People with sensory impairments / People with dementia Care period: Long stay / Respite care stay.	16	16	Care Home
18	Nova House	Conditions cared for: Older people generally Care period: Long stay / Respite care stay.	30 <sup>72</sup>	30	Care Home
19	Parris Lawn	Conditions cared for: Older people generally / People with physical difficulties / People with sensory impairments / People with dementia Care period: Long stay.	62	62	Care Home with Nursing
20	Port Manor Care Home	Conditions cared for: Older people generally / People with sensory impairments / People with a mental disability Care period: Long stay	66	66	Care Home
21	Roclyns Rest Home	Conditions cared for: Older people generally Care period: Long stay / Respite care stay.	19	16	Care Home

<sup>72</sup> Note that on housingcare.org this care home is listed as having 24 residents and 19 single rooms but the care home's own website lists it as having single rooms for 30 residents.

22	Seaford Retirement Home	Head	Conditions cared for: People with dementia Care period: Long stay / Respite care stay.	16	13	Care Home
23	St Clare's Care Home		Conditions cared for: People with dementia Care period: Long stay.	60	60	Care Home with Nursing
24	St Rita's Care Home		Conditions cared for: People with dementia Care period: Long stay	60	60	Care Home with Nursing
25	The Maples		Conditions cared for: Older people generally Care period: Long stay / Respite care stay.	24	24	Care Home
26	Threeways		Conditions cared for: Older people generally / People with physical difficulties Care period: Long stay / Respite care stay.	45	45	Care Home with Nursing
27	Webb House		Conditions cared for: Older people generally / People with learning difficulties / People with physical difficulties / People with sensory impairments Care period: Long stay / Respite care stay.	22	22	Care Home
28	Westerleigh		Conditions cared for: Older people generally / People with physical difficulties Care period: Long stay / Respite care stay.	31	21	Care Home with Nursing
<b>Total</b>				<b>946</b>	<b>893</b>	

Source: <https://housingcare.org>

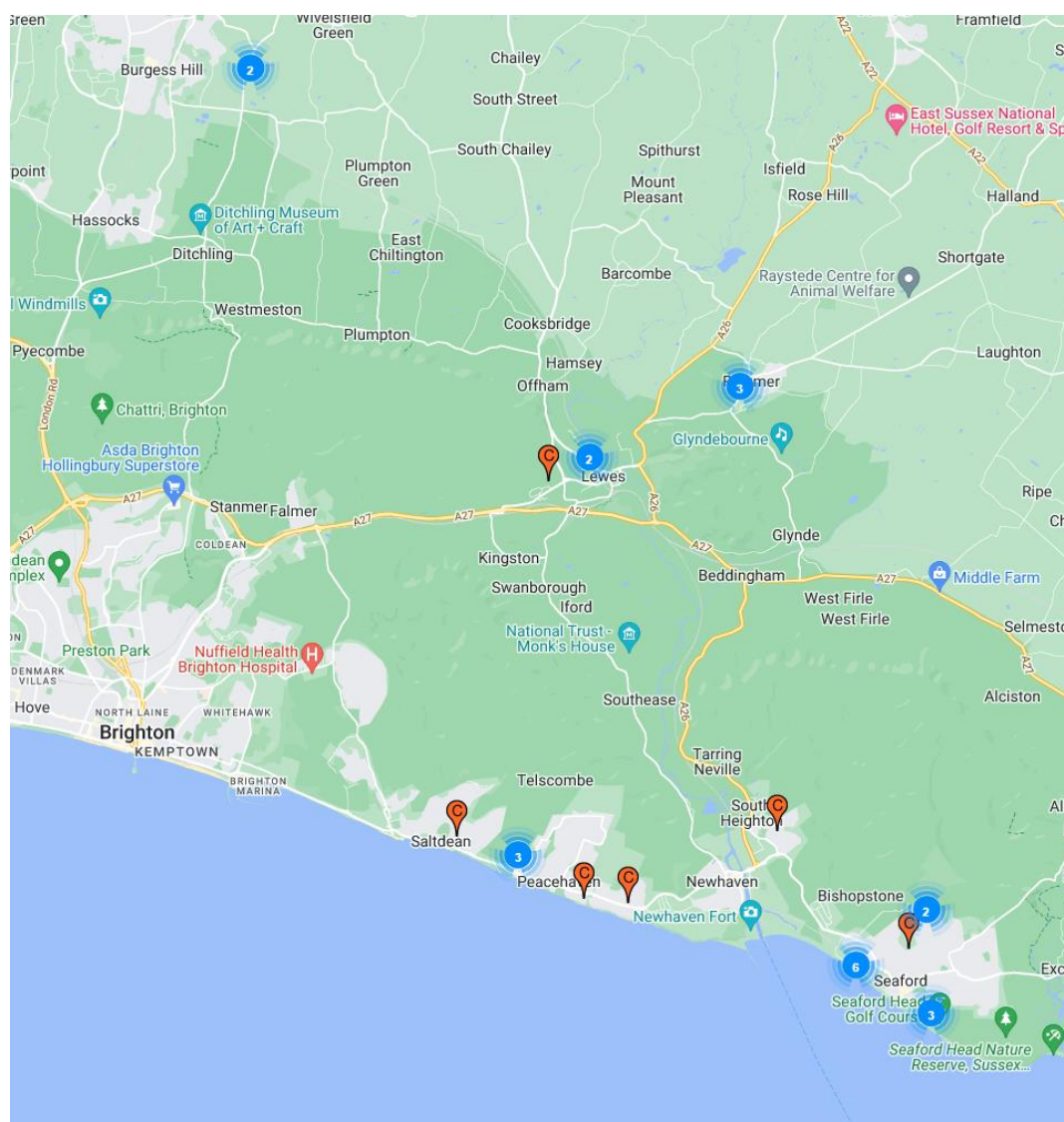
9.68 Based on the 13,100 individuals aged 75 or over currently residing in Lewes according to the 2021 Census, this equates to a provision of

- 41 residential care beds per 1,000 people aged 75+; and
- 31 nursing care beds per 1,000 population aged 75+.

9.69 This provision can again be compared to the recommended rate of 65 residential care beds and 45 nursing care beds per 1,000 people aged 75+ recommended in the 'More Choice, Greater Voice' 2008 report and shows that care bed provision is below the HLIN recommended rate of provision currently.

9.70 In terms of spatial distribution of this care home offer, the map below shows that the majority of care homes are offered in the coastal sub area, with more located in the urban than the rural parts of the District, and more outside the SDNP than inside it. This is the same as for the elderly accommodation discussion above. The most popular location appears to be in and around Seaford.

**Figure 9-2: Location of existing care homes for older people in Lewes**



Source: <http://www.housingcare.org>

## Summary

- 9.71 Lewes district's population, as per the 2021 Census, has a slightly older age profile than the wider Greater Brighton and Coastal West Sussex Market Area, with a more significant older bias compared to the population of the South East and England as a whole.
- 9.72 The proportion of older people (aged 65+) is higher in Lewes (27%) and the market area (22%) in 2021 compared to the region (20%) and England as a whole (18%). The proportion of the population aged 75 and older in Lewes was 13% in 2021, compared to 9% across England. By 2040, ONS estimates suggest the proportion of the population aged 75+ will increase to 19% in Lewes. Aging of the population is experienced at similar rates across all the geographies and in turns feeds through into the age and composition of households.
- 9.73 People experience ageing differently. Much depends on their health, lifestyle, and relationship with work. Some people live healthy and active lives into advanced old age while others may need support and care much earlier. Some will be interested in moving to a suitable home closer to services while for others, ageing independently in place will be key to their wellbeing.
- 9.74 The AECOM estimate and HLIN SHOP toolkit suggest there is need for between 1,953 - 2,557 specialist homes for older people over the plan period. If this figure is apportioned according to the Census 2021 share of population and dwellings, the range for the part of the district outside of the SDNP would be 1,434-1,877 over the plan period. The need or demand for these homes falls within the overall need for housing and is not additional to the need for homes identified through the Standard Method.
- 9.75 The needs of these households may be met by other forms of housing or accommodation. Some households may be accommodated within mainstream housing, particularly if they have limited care and support needs.
- 9.76 There are currently 52 schemes with 1,996 units (mostly flats but also some bungalows and houses) of specialist accommodation in the Local Plan area. The split between units for leasehold and freehold sale and units for rent from a social landlord or charity is approximately 52% versus 45%. Around 2% of units available for private rent. Unit sizes are largely a mix between studios, one bed, and two beds, with some three-bed accommodation also available.
- 9.77 79% of the existing offer is retirement or age exclusive housing with no on-site care offer. Only five of the total 52 schemes / 392 units (20% of the total 1,996 units available) offer on-site care as Extra Care or Close Care housing. Discussions with LDC housing officers suggest there are vacancies within the sheltered housing stock and that it is often not desirable to older people, particularly those in the market sector. The perception amongst practitioners is that the 'high end' of the specialist housing market is well catered for but there

are limited options for those at the lower end of the owner-occupied market and social rented sectors.

- 9.78 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. Nevertheless, there are overlaps between individuals or households who may be accommodated in specialist housing and those living in care homes.
- 9.79 AECOM has included three estimates of the likely need for additional care home accommodation over the plan period. These produce a range of estimates of the need for care home accommodation over the plan period. The HLIN prevalence rates estimates a higher need for additional care home beds over the plan period (43 per annum), while POPPI data estimates a need for 496 additional care home beds (25 per annum), and the AECOM estimate suggests the need for 451 care home beds over the plan period (23 beds per annum).
- 9.80 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 Lewes district. However, as discussed in this section, some of the need for care home beds might be met by independent housing accommodation and vice versa.
- 9.81 The analysis in this section suggests the gap in supply is highest in Extra Care forms of specialist housing. 20% of the current offer of housing for older persons in Lewes provides on-site care, while between 28% and 44% of projected demand over the plan period is likely to be for Extra Care housing.
- 9.82 Current care bed provision of 41 care beds and 31 nursing beds per 1,000 population aged 75+ is below the recommended provision rate of 65 care beds and 45 nursing beds per 1,000 population aged 75+.

# 10. Supported Housing for Vulnerable People

## Introduction

10.1 The objective of this section is to provide evidence on the type of supported housing and accommodation that might be required by vulnerable people in Lewes district.

10.2 The focus is on the nature and scale of need for supported housing amongst different groups; the tenure and type of accommodation they require; and where there are gaps in the availability of suitable accommodation, including supported housing, which might be addressed through new development. The aim is to ensure that there is an adequate supply of suitable dwellings, including supported housing, provided to meet the needs of vulnerable people in the Local Plan area.

## What is Supported Housing?

10.3 The National Housing Federation also provide a useful description of supported housing below:

### What is Supported Housing?

*Supported housing exists to ensure those with support needs can lead a healthy and fulfilling life within their own home and community.*

*Supported housing services range widely, but they all play a crucial role in providing a safe and secure home with support for people to live independently. This includes:*

- *providing the support older people need to maintain their independence*
- *providing emergency refuge and support for victims of domestic violence, helping them to stabilise. their lives and engage with other services*
- *working with homeless people with complex and multiple needs to help them make the transition from life on the street to a settled home, education, training or employment*
- *supporting people with mental health needs to stabilise their lives, recover and live more independently*
- *supporting ex-servicemen and women to find a stable home, including support for those with mental health and physical disability needs*
- *supporting people with learning disabilities in the longer term to maximise their independence and exercise choice and control over their lives*
- ***supporting young people, including care leavers, to live independently***

***Supported housing is often provided in partnership with a range of organisations and usually requires higher levels of funding.***

*Source: National Housing Federation (with young people added by AECOM in bold, based on experience in other authority areas)*

10.4 There is no statutory definition of supported housing and the diversity of needs and types of accommodation within the sector make a comprehensive definition

difficult.<sup>73</sup> Government describes supported housing as ‘*any housing scheme where housing is provided alongside care, support or supervision to help people live as independently as possible in the community*’.<sup>74</sup>

## What do we mean by Vulnerable People?

10.5 Vulnerable people who need support in Lewes district are likely to fall into one of the following groups (also called “client groups”):

- Older people needing care or support to live independently (this group is also discussed in more detail in previous Section 9);
- People with learning disabilities (including people with Autism Spectrum Disorder);
- People with physical disabilities;
- People with mental health needs;
- Homeless people with complex and multiple needs and single homeless people;
- Young people leaving care; and
- People fleeing domestic violence.

10.6 However, the individual needs of these groups, and of the individuals within those groups, may be specific and require bespoke forms of support and accommodation.

10.7 Supported housing for vulnerable people is an umbrella term that includes different types of accommodation provision. The Government distinguishes between three types of supported housing for funding purposes:

- Sheltered housing and extra care for older people with support needs and some working age tenants;
- Long term supported housing for those with long term needs, such as people with learning disabilities; and
- Short term supported housing for those in crisis situations, such as those fleeing domestic violence, or homeless people with support needs. This latter type of housing is typically provided for a temporary period of time (6-24 months) with the expectation that individuals will move on to other accommodation when they no longer require support.

10.8 However, the client groups above do not necessarily match the length of interventions needed to assist them. For example, not all homeless people have short term support needs and not all older people need long term support.

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<sup>73</sup> House of Commons Communities and Local Government and Work and Pensions Committees: Future of supported housing – First Joint Report of the Communities and Local Government and Work and Pensions Committees of Session 2016-17 (Published May 2017)

<sup>74</sup> Funding for Supported Housing: Consultation, DCLG and DWP, November 2016

10.9 Practitioners within the supported housing sector would wish to support vulnerable people based on their individual needs rather than fixed time frames, which may mean changes to the way services operate and how accommodation is let and managed.

10.10 This section presents evidence on the groups needing supported housing and the stock of accommodation within Lewes district to meet their needs. It is important to keep in mind that the Supported Housing sector is fragmented, with different organisations responsible for supporting different groups.

10.11 This analysis is focused on the need for accommodation and does not attempt to investigate their specific support or care needs. However, the two are inherently interdependent. Those with significant care and support needs may be more likely to need to be supported within a care home setting rather than within independent accommodation. The balance between the need for specialist accommodation versus mainstream housing is a function of the severity of care and support needs, and the approach to care and support, including the resources available and the cost to the public purse.

10.12 It is important to note that there is a much wider population of people in each client group than the number receiving support from the Council. Those with mild learning disabilities are unlikely to need care or accommodation, although they might receive support from families or other organisations to live independently. Similarly, the vast majority of those with physical disabilities live within mainstream housing and the majority are in employment. They may have care or specific accommodation needs but the majority are able to arrange these themselves, using their own resources or financial support provided by Disability Living Allowance (DLA), Personal Independence Payments (PIP), or similar benefits.

10.13 Similarly, there is a wider population of older people (also discussed in Section 9) who have care or accommodation needs that are met by their family or perhaps by other organisations including charities. A further group of people with care and/or accommodation needs, including many older people, arrange their own care within the private sector and are not currently under the care of the council. As mentioned in our previous section, this might take a number of forms:

- Adapting their own property in minor ways to make life easier as mobility problems increase e.g. adding hand rails, replacing bathrooms, adding ramps to external doorways;
- Arranging for extra support to help with everyday tasks e.g. cleaning, shopping etc or carers provided by private organisations to help with dressing, bathing etc; and/or
- Arranging and paying for care and accommodation within a residential or nursing care home.



## Data Sources

- 10.14 The analysis in this paper represents the position in mid-2022 and tries to estimate the needs over the Lewes plan period 2020-2040.
- 10.15 The number of people receiving care or support is constantly changing, although the figures are likely to present a fair indication of the scale of current needs. Data availability in this area is frequently poor and as such this evidence may be updated over time as more information becomes available.
- 10.16 Given the scope of this study, as well as the nature of supported housing, which is allocated by public authorities to individuals with needs identified within local authority boundaries, data is included for Lewes district only, rather than for the wider housing market area. However, there may be cross boundary issues which need to be highlighted. This could include, for example, where individuals are placed in accommodation outside of Lewes district because their needs cannot be met locally. In the case of mental health services, these are commissioned across a wider area and specific services or accommodation is not available in every local authority area. which means that clients may be placed outside of their local area.
- 10.17 AECOM analysis in this section, like in the previous section on older persons housing needs, primarily uses a mixture of Census 2011 data, mid-year population estimates for 2020 to represent the start of the plan period, some limited early Census 2021 results for comparison, and 2018-based population projections for 2040 to represent the end of the plan period.
- 10.18 Using Census data, it is possible, in general terms, to examine the current population with disabilities at various geographies and from various perspectives, and to model how that population will change in future. This presents a starting point for planning for the specialised housing needs of those with health problems and disabilities. However, there are limitations, due to the fact that data has to largely be based on the Census 2011, which is now over ten years old. Early results from the 2021 Census do not yet include data on this subject.
- 10.19 Another important source of data for this section is Projecting Adult Needs and Service Information System (PANSI) data<sup>75</sup>, which publishes adult population (aged 18-64) estimates and projections on various disabilities, correlated with age and gender at the local authority level. PANSI provided data as at May 2022, based on PANSI version 14.2.

## The supported housing sector nationally

- 10.20 It is useful to draw on the evidence within the Government's Review of Supported Housing conducted in 2016<sup>76</sup>. The review was necessary because of the lack of data and information about the scale of the supported housing sector and the different client groups supported across the country. Research

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<sup>75</sup> [Projecting Adult Needs and Service Information System \(pansi.org.uk\)](https://pansi.org.uk)

<sup>76</sup> [Supported accommodation review - GOV.UK \(www.gov.uk\)](https://www.gov.uk)

undertaken for the review involved a primary survey of local authorities to collate data since this was not available in a consistent basis across client groups and between authorities.

**Figure 10-1: Profile of Supported Housing by Client Group**

Client group	England		Wales		Scotland		Great Britain	
	Units	%	Units	%	Units	%	Units	%
Older people (65+)	395,000	71	30,500	79	36,500	61	462,000	71
People with learning disabilities	38,500	7	3,000	8	6,000	10	47,500	7
Single homeless people (inc rough sleepers)	30,000	5	1,000	3	6,000	10	37,000	6
People with mental health problems	29,500	5	1,000	3	2,500	4	33,000	5
Vulnerable young people (16-25)	19,500	4	1,000	3	1,000	2	21,500	3
People with physical disabilities or sensory impairment	9,000	2	*	*	2,500	4	12,000	2
Homeless families	5,500	1	500	1	2,500	5	8,500	1
People with drug or alcohol misuse needs	4,500	1	500	1	1,000	2	6,000	1
At risk of domestic abuse	4,500	1	500	1	1,000	2	6,000	1
Offenders	4,500	1	*	*	*	*	4,500	1
Others (inc refugees or asylum seekers and others) <sup>43</sup>	13,000	2	*	*	500	*	13,500	2
<b>Total</b>	<b>553,500</b>	<b>100</b>	<b>38,500</b>	<b>100</b>	<b>59,500</b>	<b>100</b>	<b>651,500</b>	<b>100</b>

*Source: Local authority survey undertaken in 2015*

10.21 The vast majority of people living in supported housing in England are older people, accommodated in sheltered or extra care schemes (Figure 10-1). This does not include older people who live in an institutional setting such as residential or nursing care home.

10.22 Figure 10-2 sets out the breakdown of working age client groups in supported housing (working age is defined as those aged 16-64).

**Figure 10.2: Working Age Client Groups in Supported Housing**

Client group	England		Wales		Scotland		Great Britain	
	Units	%	Units	%	Units	%	Units	%
People with learning disabilities	38,500	24	3,000	40	6,000	26	47,500	25
Single homeless people (inc rough sleepers)	30,000	19	1,000	13	6,000	26	37,000	20
People with mental health problems	29,500	19	1,000	14	2,500	10	33,000	18
Vulnerable young people (16-25)	19,500	12	1,000	13	1,000	5	21,500	11
People with physical disabilities or sensory impairment	9,000	6	*	2	2,500	11	12,000	6
Homeless families	5,500	3	500	4	2,500	12	8,500	4
People with drug or alcohol misuse needs	4,500	3	500	5	1,000	4	6,000	3
At risk of domestic abuse	4,500	3	500	5	1,000	4	6,000	3
Offenders	4,500	3	*	2	0	0	4,500	2
Others (inc refugees or asylum seekers and others)	13,000	8	*	1	500	1	13,500	7
<b>Total</b>	<b>158,500</b>	<b>100</b>	<b>8,000</b>	<b>100</b>	<b>23,000</b>	<b>100</b>	<b>189,500</b>	<b>100</b>

*Source: Local authority survey undertaken in 2015*

10.23 This data at the national level provides a snapshot of the scale of the supported housing sector and the number of people accommodated from different client groups. Comprehensive comparable data is not currently available for Lewes. Evidence of the scale of the sector in the area and the current need from different groups is included in this section as far as the data permits. This provides an incomplete picture of the sector and so this section provides the starting point for discussion of relevant issues.

#### Box 10-1: Supported Housing Costs, Benefits and Funding

*How individuals/ households are supported:* The majority of supported housing tenants have their rent met in full by housing benefit. Funding for additional supervision, support and care services are typically paid for by local authority adult social care services or housing and homelessness budgets, depending on the client group.

*Government funding of Supported Housing:* Between 2003 and 2009, *Supporting People* brought together several funding streams into a single grant for local authorities for the funding of non-housing related costs. Funding of the different client groups has become fragmented since the ringfence was removed from the *Supporting People* budget in 2009.

The Government's review of supported housing in 2016 estimated the annualised cost of the supported housing sector that is covered by Housing Benefit (across Great Britain) at the end of 2015 at £4.12bn.

The review also estimated that the additional annualised spend on support and care services (that is in addition to Housing Benefit spend) at the end of 2015 was around £2.05bn. This was described as a conservative estimate.

The Select Committee report into the Future of Supported Housing noted that rents in the supported housing sector are higher than in general needs accommodation. The report stated that it was '*difficult to provide a comprehensive list of reasons why supported housing rents were higher in this sector, [but] these included 24-hour staffing of some facilities, the installation and monitoring of CCTV, high turnover rates in the accommodation and repair costs, and enhanced fire monitoring and safety equipment.*'

*The benefits of supported housing:* It is not the purpose of this LHNA to identify the costs of supported housing, but it is useful to provide a brief summary to counterbalance these costs with the estimated benefits (and cost savings) that supported housing delivers. Not all of the benefits can be quantified in monetary terms. While supported housing is more expensive than general needs accommodation, there is evidence that it generates substantial cost savings for other parts of the public sector:

- The net benefit of providing supported housing to the wider public sector is estimated to be £3.5 billion per year.<sup>77</sup> Specifically, there are significant cost savings to the social care budget that can be attributed to supported housing.
- The sector plays an important role in delivering and supporting outcomes in other public services, such as the NHS and the criminal justice system.
- The National Housing Federation estimates that, for older tenants, the annual saving to the taxpayer, through reduced reliance on health and social care services is around £3,000 per person. For people with learning disabilities and mental health issues, the saving is estimated to be between £12,500 and £15,500.
- The Associated Retirement Community Operators (ARCO) have estimated that people in extra-care housing cost the NHS 38% less on average than the population in general needs accommodation.
- Rethink Mental Illness state that the costs of supported housing compare favourably to the cost of NHS provision, highlighting that a stay on an acute ward in the NHS could amount to many multiples of the cost of the average daily rent for working age people in supported housing.<sup>78</sup>

<sup>77</sup> Marcus Jones MP, Minister for Local Government evidence to the Select Committee on the Future of Supported Housing

<sup>78</sup> Gillian Connor, Head of Policy at Rethink Mental Illness, evidence to the Select Committee on the Future of Supported Housing

10.24 Whilst not within the scope of this LHNA, it is useful to summarise the issues around the costs and funding of Supported Housing. These can shed light on the current landscape for the sector and impact on the scale of accommodation that can be provided. This topic is briefly outlined in Box 10-1 below.

## Health and Disability in Lewes District

10.25 Before considering the scale of need from specific vulnerable groups in the population, it is useful to examine the broad scale of health problems and disability in the population as a whole.

10.26 The 2011 Census provides data on people with a long-term health problem or disability (LTHPD), which is defined as a health-problem or disability that limits that person's day-to-day activities and has lasted or is expected to last at least 12 months. The data is broken down by whether the respondent's activities are perceived to be limited 'a lot' or 'a little'. Census 2011 is the most recent data available on this subject.

10.27 Table 10-3 below shows the total number of residents in Lewes District reporting an LTHPD in 2011, broken down by the degree of activity limitation, and compared with the wider geographies of East Sussex and England overall.

10.28 This shows that Lewes district has a broadly similar incidence of disability compared to the country as a whole, and a slightly lower incidence compared to the county average. This is true for the percentage of the population with an LTHPD, as well as for the percentages within this measure (of people whose activities are limited a little or a lot). Overall, 18% of Lewes District residents have an LTHPD, compared to 20% across East Sussex and 18% across England.

**Table 10-3: Population with LTHPD in Lewes, East Sussex and England, 2011**

	Lewes		East Sussex		England	
	Total	Percentage <sup>79</sup>	Total	Percentage	Total	Percentage
All usual residents	97,502	100%	526,671	100%	53,012,456	100%
Total with a LTHPD	17,939	18%	107,145	20%	9,352,586	18%
Day-to-day activities limited a lot	7,659	8%	48,243	9%	4,405,394	8%
Day-to-day activities limited a little	10,280	11%	58,902	11%	4,947,192	9%

*Source: 2021 Census*

10.29 The overall incidence of disability can also be compared across the different sub-areas within Lewes district. The population of the coastal sub area has the

<sup>79</sup> Note that percentages are rounded to the nearest full percent and therefore may not add up exactly

highest proportion with a LTHPD. This is likely to be due to its older age profile. The rates in the rural and town sub-areas are approximately equal, and both relatively low. The sub-area outside the SDNP has a significantly higher rate of disability than inside.

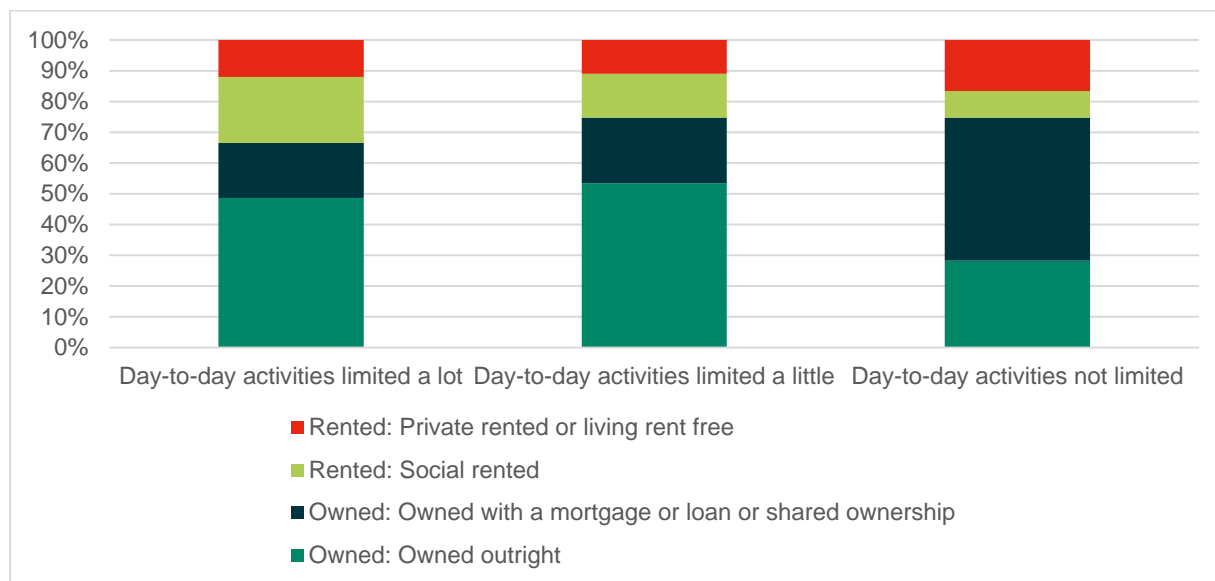
**Table 10-4: Population with LTHPD at various geographies within Lewes, 2011**

	<b>Lewes District</b>	Lewes inside SDNP	Lewes outside SDNP	Lewes Sub-Area - Coastal	Lewes Sub-Area - Rural	Lewes Sub-Area - Town
All usual residents	<b>97,502</b>	27,313	70,189	57,347	22,858	17,297
Total with a LTHPD	17,939 <b>(18%)</b>	4,280 (16%)	13,659 (20%)	11,812 (21%)	3,438 (15%)	2,689 (16%)
Day-to-day activities limited a lot	7,659 <b>(8%)</b>	1,670 (6%)	5,989 (9%)	5,249 (9%)	1,324 (6%)	1,086 (6%)
Day-to-day activities limited a little	10,280 <b>(11%)</b>	2,610 (10%)	7,670 (11%)	6,563 (11%)	2,114 (9%)	1,603 (9%)

Source: *Census 2011*

10.30 Next, we look at the prevalence of long-term disability among different tenure groupings. Figure 10-5 below shows the tenure mix occupied by people with LTHPDs in Lewes (those with their 'day-to-day activities limited a lot' and 'a little'), compared to those without an LTHPD ('day-to-day activities not limited'). The data shows that people with a LTHPD in Lewes are more likely to own their property outright or to live in social rented accommodation, than those whose day-to-day activities are not limited. Conversely, they are less likely to own their property with a mortgage, loan, or shared ownership arrangement, and also less likely to live in a privately rented property. This is largely due to the bias towards older people in this group, with patterns of home ownership generally highest in the older population and levels of private renting tending to be low.

**Figure 10-5: Tenure of people with LTHPD, Lewes**



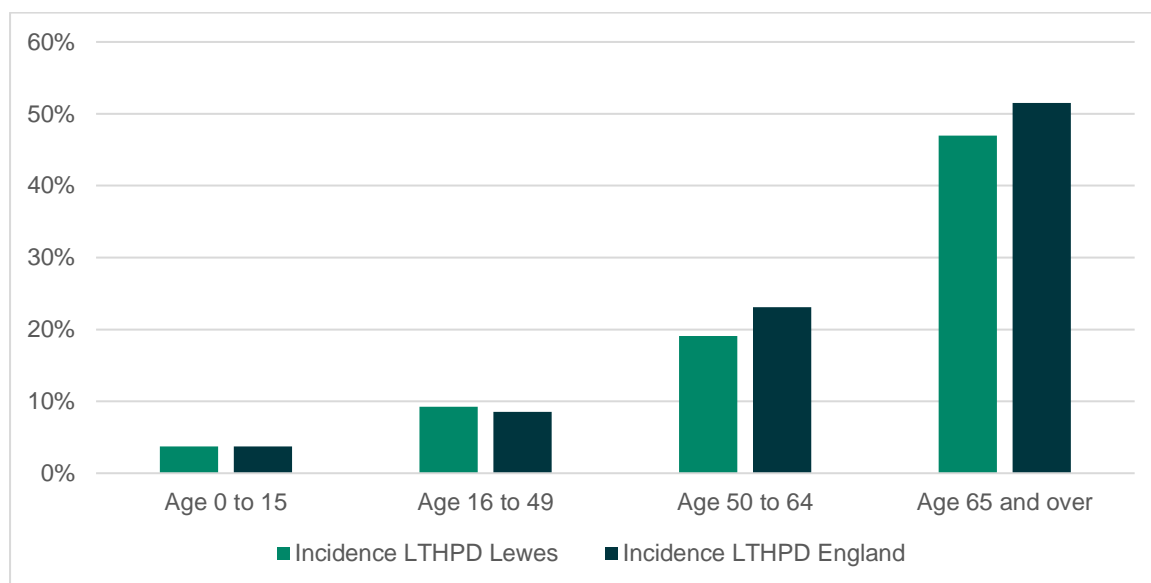
Source: 2011 Census

10.31 We next consider the prevalence of long-term disability and mobility by age group. Figure 10-6 clearly shows that the incidence of long-term disability and age are strongly correlated.

10.32 Lewes district and England show largely similar trends as regards disability (those with their day-to-day activities limited a lot and a little) by age group, particularly for the younger age groups. Incidence roughly doubles from the age group of 0-15 (where 4% of the age group population have a disability) to 16-49 (where this rises to 9%) for both geographies. In the next age group, aged 50-64, 23% of the age group population have a disability across England, while for Lewes this is lower, at 19%.

10.33 In the oldest age group, aged 65 and over, about half of the age group population has their day-to-day activities limited to some extent (52% for England as a whole, and 47% for Lewes district). Interestingly, the level of disability in Lewes' two older age groups aged 50 and over is lower than at the national level. This may indicate that whilst the population has a known older bias, a larger proportion of these people are active and healthy in later life compared to England as a whole.

**Figure 10-6: Incidence of LTHPD by age group in Lewes District and England**



Source: 2011 Census

10.34 The prevalence of long-term disabilities by age group is then applied to the projected population of Lewes by age group at the end of the Plan period (see Table 10-7).

**Table 10-7: Lewes population with a disability by the end of plan period 2040**

Age bracket	Total population 2040	% of whom have LTHPD	Population with LTHPD
Age 0 to 15	17,043	4%	682
Age 16 to 49	58,695	9%	5,283
Age 50 to 64	21,243	19%	4,036
Age 65 and over	37,603	47%	17,673
<b>Total</b>	<b>113,335</b>	<b>19%</b>	<b>27,674</b>

Source: 2011 Census, ONS 2018-based sub national projections, AECOM calculations

10.35 This can be compared with the population by age with a LTHPD in the 2011 Census, and, by applying the incidence percentages from 2011 to population projections for 2020 and 2040, calculating the projected increase in the disabled population over the plan period.

**Table 10-8: Projected increase in Lewes District's disabled population from beginning to the end of the plan period 2020-2040 (and comparison with Census 2011)**

	2011	2020	2040	Increase 2020-2040	% Increase 2020-2040
Age 0 to 15	629	711	682	-29	-4%
Age 16 to 49	3,468	5,305	5,283	-22	0%
Age 50 to 64	3,844	4,225	4,036	-189	-4%
Age 65 and over	9,998	12,787	17,673	4,887	38%
<b>Total</b>	<b>17,939</b>	<b>23,028</b>	<b>27,674</b>	<b>4,646</b>	<b>20%</b>

Source: Census 2011, ONS 2018-based projections for 2020 and 2040, AECOM calculations

10.36 Table 10-8 shows that the total projected 20% increase (4,646 additional persons with a LTHPD over the plan period) is, not unexpectedly, driven entirely by growth in the older population. Age groups below 65 are likely to see reduced numbers of people with a LTHPD. Within Lewes, the projected population with a LTHPD represents 19% of the total Local Plan area population (of 113,335) by 2040, in line with the incidence rates in 2011<sup>80</sup>.

## Vulnerable groups in Lewes District

10.37 The rest of this section examines the housing needs of specific vulnerable groups in Lewes district.

10.38 While this provides an additional level of detail it also has limitations. It is possible to set out the number of people in particular client groups as described above, e.g. older people, people with learning disabilities, or people with mental health needs. However, the majority of people in these groups will not need care or support or supported accommodation to live independent lives. Therefore, it is less easy to calculate the scale of need for care, or support, or for supported housing as distinct from other forms of accommodation. Nevertheless, the data gives a further indication of and detail on overall likely need.

10.39 The rest of this section therefore examines evidence on:

- The broad population of people in each client group;
- Of these, the proportion / number of people who need care or support;
- Of these, the proportion / number who need Supported Housing; and
- Future trends associated with each group.

<sup>80</sup> Based on ONS sub-national 2018-based population projections



## Older People

10.40 This group is covered in detail in our previous Section 9. However, it is useful to summarise here:

10.41 **Broad Population:** Census 2021 confirms that there are 26,500 individuals aged 65 or over in Lewes district. Over 65s account for around 26% of the total population in 2021, a higher level than in the South East (19%) and across England as a whole (18%). However, the growth of the older population, and of the population overall, from 2011-2021 has been slightly lower than expected in previous projections.

10.42 Anticipated growth in the Lewes district population will be led by the older portion of the population, with those aged 65+ projected to make up 33% of population in 2040.

10.43 The proportion of older people aged 85 is 4.1% in 2021, a lower proportion than in 2011 (3.6%). The majority of these individuals (aged 85+) will have some form of care need, whether they live in mainstream housing or specialist accommodation.

10.44 **Care/support needs:** East Sussex County Council (ESCC) currently provide domiciliary care or residential or nursing care to older people in Lewes district<sup>81</sup>. Some of these people receive care in their own home, with others being cared for in a residential or nursing setting. It is important to keep in mind that this is not the full population of older people with care needs as many others are not eligible for the Council's support and fund their own care and support. Discussion with ESCC suggests a strong preference amongst older people with means to remain in their own homes, with these people able to finance their own care and support.

10.45 **Supported housing:** According to the Elderly Accommodation Counsel data there are currently 51 schemes with 1,925 units of specialist elderly accommodation in Lewes district at present. 54% of these units are being offered for leasehold or freehold market purchase, and 44% are available for rent by social landlord or charity for those in financial need. 2% of specialist units are available for private rent. 80% of the existing offer is retirement or age exclusive housing with no on-site care offer. Only 20% of the total units available constitute Extra Care or Close Care housing while demand is projected to be between 28% and 44% over the plan period. Current provision of 1,925 specialist elderly housing units equates to around 147 units per 1,000 of the 75+ population.

10.46 Current care bed provision of 39 care beds and 35 nursing beds per 1,000 population aged 75+ is below the recommended provision rate of 65 care beds and 45 nursing beds per 1,000 population aged 75+.

10.47 **Future trends:** As the older population is projected to grow in the future, more people are likely to need care and support. Whilst life expectancy continues to

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<sup>81</sup> [Supported housing and care homes | East Sussex County Council](#)

rise, healthy life expectancy has not risen in line, which has driven increased demand for care and support amongst the older population. The ESCC Draft East Sussex Health and Social Care Plan (2019)<sup>82</sup> anticipates that “*demand for health and social care will continue to increase, both as a result of the growth in the proportion of older people in the population and the complexity of their needs with increasing longevity, frailty and multi-morbidity*”.

10.48 Maximising independence and maintaining people in the community, and thus helping people to live independently at home for longer is one of the number one key delivery aims of the Draft East Sussex Health and Social Care Plan. Therefore, help to live independently at home is most likely to be offered as the first option for older people in Lewes, rather than residential or care home accommodation. Nevertheless, there will continue to be demand for long term care and respite and reablement within care home settings.

10.49 As set out in Section 9, the estimate of future need in Lewes for specialist older persons’ accommodation is between 1,953 - 2,557 units during the Plan period 2020-2040 (98-128 units per annum), and the estimated need for care home beds over the same period is 23-43 additional beds (with or without nursing) per annum.

## People with Learning Disabilities

10.50 **Broad population:** National research suggests that the incidence of people with learning disabilities in the population as a whole is around 2-3%. However, this includes those with difficulties ranging from low, and moderate, to severe. This equates to 1.2 million people in England, of which 286,000 are under the age of 18.<sup>83</sup> If 3% of Lewes’ population has a learning disability this would equate to around 3,118 people at the start of the plan period in 2020 (the total population of Lewes based on 2020 mid-year population estimates is 103,925) and by the end of the plan period in 2040 (based on a projected population of 113,335) this would equate to 3,400 persons. Note that if applying this percentage to the early population results for Lewes of the 2021 Census (99,900), the current figure (2,997) would be slightly lower than the estimate based on the 2018-based projections for 2020.

10.51 A large proportion of people with learning disabilities have autistic spectrum disorder. National research suggests this could be as high as one third of those with learning disabilities. In the population as a whole, approximately 1% of people have some form of autism.<sup>84</sup> If this proportion holds true within Lewes district, this equates to 1,039 in 2020 (including children and adults) and to 1,133 by 2040 (based on ONS sub national mid-year projections).

10.52 PANSI data for Lewes district estimates this figure to be lower, estimating that the total population aged 18 and over predicted to have a learning disability is 1,932 in 2020, rising to 2,164 in 2040. Regarding adults under 65 with autistic

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<sup>82</sup> [DRAFT East Sussex Health and Social Care Plan v6.3.pdf](#)

<sup>83</sup> Evidence cited in the NHS Transforming Care report (2017) by Emerson (2012)

<sup>84</sup> Evidence cited in NHS Transforming Care report (2017) including Emerson 2010 and Brugha 2012

spectrum disorder, PANSI estimates 562 persons aged 18-64 in 2020 and 561 in 2040 for Lewes district. However, note that these figures, unlike our estimates above, are not for the whole population but only include certain ages.

**Table 10-9: PANSI data on learning disabilities for Lewes**

People predicted to have a learning disability, by age	2020	2040
People aged 18-24 predicted to have a learning disability	170	173
People aged 25-34 predicted to have a learning disability	247	264
People aged 35-44 predicted to have a learning disability	278	282
People aged 45-54 predicted to have a learning disability	341	331
People aged 55-64 predicted to have a learning disability	330	326
People aged 65-74 predicted to have a learning disability	303	358
People aged 75-84 predicted to have a learning disability	181	284
People aged 85 and over predicted to have a learning disability	83	146
<b>Total population aged 18 and over predicted to have a learning disability</b>	<b>1,932</b>	<b>2,164</b>

Source: PANSI data as at 24.05.2022 from [www.pansi.org.uk](http://www.pansi.org.uk) version 14.2

10.53 Of this population, between 19-20% is predicted, based on PANSI data, to have a moderate or severe learning disability, and hence likely to be in receipt of care or support services (around 415 persons by 2040).

10.54 **Supported housing:** Although no data is available as yet, the majority of those who receive care or support from ESCC are likely to be supported in their own homes or in supported living. On the whole, people with learning disabilities want to live independently and having their own front door is viewed as key to this.

10.55 **Future trends:** The population of people with learning disabilities is gradually increasing over time because of medical advances which result in higher survival rates at birth and longer life expectancy of those with conditions such as Downs Syndrome. However, the growth in the size of this group is expected to be limited in the short term.

10.56 The number of people with learning disabilities who need supported housing is also increasing because local authorities are trying to reduce the number of people living in residential care. Many long stay hospitals have closed since the 1980s, and this trend has increased in recent years since the Department of Health report 'Transforming Care'<sup>85</sup>.

10.57 There has also been a trend towards the de-regulation of care homes with some converting to supported housing where residents become tenants. Not all

<sup>85</sup> [Transforming care: A national response to Winterbourne View Hospital \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

institutions are suitable for conversion to supported housing so this may mean the need to develop new supported accommodation.

## People with Physical Disabilities

10.58 **Broad population:** This analysis refers to adults with physical disabilities who are aged 18-65 (the working age population). Note that this section tends to largely focus on people aged 18-65. People with disabilities over the age of 65 are included in the older people client group and people under the age of 18 with disabilities are assumed to be primarily accommodated within a parent or carer household.

10.59 One indication of the level of disability within the population is the number of people claiming DLA or PIP which is replacing it. DLA is a non-contributory, non-means-tested and tax-free contribution towards the disability-related extra costs of severely disabled people who claim help with associated costs before the age of 65. DLA therefore provides an indication of the number of people in working age groups who are disabled and who have personal care needs, mobility needs or both.

10.60 In order to determine the proportion of the population who are DLA claimants, data for the population as a whole from the 2011 Census needs to be gathered. However, as the number or proportion of DLA claimants was not recorded in the Census, the number of claimants from May 2011, i.e. the closest point to the Census for which data is available, needs to be cross-referenced with the Census data. The results are presented in Table 10-10.

**Table 10-10: Proportion of Disability Living Allowance Claimants in Lewes District, 2011**

	Total population (Census 2011)	Working age population aged 18-64	DLA claimants (May 2011) <sup>86</sup>	DLA claimants aged 18-64	Approx. proportion of population who claim DLA (May 2011)	Approx. proportion of DLA claimants aged 18-64 (May 2011) (%)
Lewes	97,502	56,014	4,110	2,620	4.22%	4.68%
East Sussex	526,671	302,467	24,560	15,820	4.66%	5.23%
England	53,012,456	33,014,967	2,635,110	1,616,300	4.97%	4.89%

Source: Census 2011, Nomis (benefit claimants - disability living allowance by disabling condition), AECOM Calculations

10.61 Table 10-10 shows that Lewes district has a slightly below but close to average proportion of disability allowance claimants, compared to the national and county

<sup>86</sup> Based on ONS data last updated in 2018

average. Rates of disability amongst the general population are substantial but the vast majority of those with physical disabilities live without care or support:

- There are around 2,620 working age people who claimed disability benefits (DLA) in Lewes district in 2011. This equated to 4.68% of the working age population which is a slightly lower rate than across East Sussex and England as a whole (5.23 and 4.89% respectively).<sup>87</sup>
- Disability is strongly linked to age. Around 1 in 5 of the working age population nationally has a disability, compared to half over those at pensionable age.<sup>88</sup> A further 980 older people (65+) and 510 children (under 18) claimed DLA in Lewes district in 2011.
- This does not mean that they need care or accommodation but provides evidence of the wider population of disabled people.

10.62 **Care/support needs:** Precise data on the number of working age people who have physical disabilities and require care or support is not available. However, it is possible to infer the scale of need for care and support from PANSI data. This predicts the number of people with impaired mobility and moderate or serious personal care disabilities (Figures 10-11 and 10-12).

10.63 The number of people with impaired mobility in 2020 is of a similar scale to the number of people who receiving DLA payments in 2011, although slightly lower (around 3,482 working age people). By the end of the plan period this is predicted to decrease slightly further (to around 3,428 persons). The vast majority of these people will receive care or support in their own homes (and workplaces) if they need it and are likely to live independent lives.

**Figure 10-12: Population of People Aged 18-64 with Impaired Mobility, Lewes**

People predicted to have impaired mobility (by age group)	2020	2040	Change 2020-2040	% Change
18-24 years	63	65	2	3.2%
25-34 years	99	106	7	7.1%
35-44 years	565	565	0	0.0%
45-54 years	725	690	-35	-4.8%
55-64 years	2,030	2,002	-28	-1.4%
<b>Lewes Total aged 18-64</b>	<b>3,482</b>	<b>3,428</b>	<b>-54</b>	<b>-1.6%</b>
<b>East Sussex Total aged 18-64</b>	<b>18,971</b>	<b>18,574</b>	<b>-397</b>	<b>3.2%</b>

Source: PANSI

10.64 A smaller number of people with physical disabilities have serious personal care disabilities and may be more likely to need care in specialist accommodation. Figure 10-13 shows that there are 3,030 adult persons with moderate or serious personal care disabilities in Lewes district at the start of the plan period in 2020,

<sup>87</sup> Calculation based on DLA claims in May 2011 (ONS) and population estimates in 2011 for working age (16-64) population (ONS)

<sup>88</sup> Family Resource Survey 2010/11

projected to decline slightly to 2,981 in 2040. Those with a serious care disability are projected to decline slightly, by 2%, from 539 to 531 persons.

**Figure 10-13: Population of People Aged 18-64 Predicted to Have Personal Care Needs, Lewes District**

People with serious personal care disability by age	2020	2040	Change	% Change
18-24 years	25	26	1	3%
25-34 years	40	42	9	6%
35-44 years	68	68	0	0%
45-54 years	160	152	-35	-5%
55-64 years	247	243	-18	-1%
All people aged 18-64	539	531	-41	-2%
People with a moderate personal care disability by age	2020	2040	Change	% Change
18-24 years	38	39	1	4%
25-34 years	139	148	2	5%
35-44 years	328	328	0	0%
45-54 years	711	676	-8	-5%
55-64 years	1,276	1,258	-4	-2%
All people aged 18-64	2,491	2,450	-8	-1%

Source: PANSI

10.65 **Supported housing:** There are very few individuals with physical disabilities who are supported by the County Council and these typically have very high levels physical disability and require bespoke accommodation suited to their individual needs.

10.66 **Future trends:** The PANSI data predicts that the population of people with physical disabilities aged 18-64 will be broadly stable or decline slightly over the plan period, with the only group increasing by more than one percent being the two youngest working age groups aged 18-34. However, in line with ESCC's approach to people with care and support needs, people with physical disabilities are most likely to be offered support in their own homes or in supported living accommodation where available and possible.

## People with Mental Health Needs

10.67 **Broad population:** Evidence at the national level suggests that the prevalence of mental illness within the population as a whole is 0.7%.<sup>89</sup> Mental illness is defined as schizophrenia, bipolar disorder, and other psychoses. A further 8.1% are estimated to have depression.

10.68 When these proportions are applied to the population in Lewes, which was around 103,925 people in 2020 based on ONS mid-year population estimates, this suggests 728 people have a serious mental illness in 2020, predicted to rise

<sup>89</sup> Figure for England from the UK Health Statistics 2010 from GP practice data 2009-10 9 (ONS)



to 793 by the end of the plan period, based on 2018-based projections for 2040. A further 8,418 people are likely to have depression within the District in 2020 rising to an approximate 9,180 in 2040.

10.69 This can be compared to PANSI data below, which suggests that there are even higher numbers of working age people with mental health problems, with over 10,000 in Lewes district experiencing a common mental disorder. This is of a similar scale to the number of people expected to have depression based on national prevalence rates. The vast majority of these people will live independently and will not require supported housing.

10.70 The PANSI data predicts an approximate 1% decline in the working age population with mental health problems by 2040. However, this reflects a fall in the size of the working age population rather than a change in the prevalence rate of mental health problems.

**Figure 10-14: Population of People Aged 18-64 with a mental health problem, Lewes District**

People aged 18-64 predicted to have a mental health problem	2020	2025	2030	2035	2040	Change 2020-2040	% Change
People aged 18-64 predicted to have a common mental disorder	10,769	10,821	10,798	10,714	10,653	-116	-1%
People aged 18-64 predicted to have a borderline personality disorder	1,367	1,374	1,371	1,360	1,353	-14	-1%
People aged 18-64 predicted to have an antisocial personality disorder	1,890	1,902	1,900	1,890	1,881	-9	0%
People aged 18-64 predicted to have psychotic disorder	398	400	399	396	394	-4	-1%
People aged 18-64 predicted to have two or more psychiatric disorders	4,092	4,113	4,106	4,076	4,055	-37	-1%

Source: PANSI

10.71 **Future trends:** There is limited evidence on the likely future requirement for accommodation to care for and support those with mental health needs. However, qualitative discussions with local practitioners provide an insight into the challenges.

10.72 Reductions in the budgets available to address mental health needs (in both the NHS and County Council), resulting in losses in supported accommodation in recent years are likely to feed through to acute pressures elsewhere in the future, including increased homelessness and acute health crises. This has led to calls from practitioners to tackle the 'multiple disadvantage' that many people face. Making Every Adult Matter (MEAM<sup>90</sup>) estimate around 380 people in each

<sup>90</sup> Making Every Adult Matter (MEAM) is a coalition of national charities – Clinks, Homeless Link, Mind and associate member Collective Voice. Together MEAM represents over 1,300 frontline organisations across England.

local authority in the country experience multiple disadvantage, i.e. they may be homeless, they may also be ex-offenders or care leavers, experience mental health difficulties and other disadvantages. They encounter a number of different services (e.g. housing, NHS, probation service) because of their chaotic lives, yet these services are rarely coordinated around their individual needs. Furthermore, changes or budget cuts in one service often mean pressures increase elsewhere as these individuals struggle to manage their lives.

## Single Homeless People with Support Needs

10.73 **Broad population:** It is difficult to establish a wider population for this vulnerable group since they are only identified by virtue of their approaching the Council for support and/or being registered on the Waiting List. It important to keep in mind that this group is likely to overlap with other groups to some extent, particularly those with mental health needs. The Lewes Waiting List provides an indication of the current demand for supported accommodation from single homeless people. However, this is only a partial picture of need because it only records those individuals who need or are eligible for the support that Lewes can provide. This largely relates to support for homeless people and households. Those who need support because of learning disabilities are likely to be under the remit of the County Council. Those with severe mental health conditions may be under the care of the NHS.

10.74 There are over 1,000 homeless households on the Waiting List in Lewes district, but not all these are single households. However, data from the Lewes Homelessness Review 2021 provides further detail on the support needs of households who approach the Council for housing.

10.75 Just under half (46%) of households owed a duty (ie accepted as homeless) were assessed as having one or more support needs in the latest year. This is a slight fall compared to the previous year, likely as a result of the younger age profile of those assisted under the duties.

**Figure 10-15: Households with support needs 2018/19 to 2020/21**

	Support needs	No needs	Total	% with support need
<b>2018/19</b>	94	186	280	34%
<b>2019/20</b>	155	158	313	50%
<b>2020/21</b>	132	152	284	46%

Source - Lewes CX Homelessness Information System (table included in Lewes Homelessness Review 2021)

10.76 According to the Lewes Homelessness Review, a history of mental health problems remained the most common reason for requiring support, accounting for almost 40% of those identified as having support needs. Physical ill health and disability (16%), then domestic abuse (7%) were the other leading reasons. Alcohol dependency and young people needing support were also key factors.

10.77 The top three reasons for support remain unchanged from the previous year, though there has been a significant increase (+10%) in those identifying mental



health as a support need. Compared to the previous year, having a history of mental health problems is the only support need to show a significant increase. Amongst the other leading reasons, the percentage identifying alcohol dependency, old age and young people requiring assistance remained steady. These patterns reflect the increased numbers of single households and those at risk of rough sleeping accessing services in the past year.

10.78 There is evidence that the housing needs team was seeing an increase in the numbers of vulnerable individuals with multiple and complex needs, accessing services before the Covid 19 pandemic. This is illustrated by the fact that the percentage of those owed a prevention or relief with support needs increased from 33%, to 45%, between 2018/19 & 2019/20.

10.79 The majority of the individuals or households identified as needing supported housing are vulnerable because they are homeless and/or need to move on from existing accommodation such as a hostel. The need for move on accommodation is acute according to discussions with LDC officers. In part, this need has increased after the Government's 'Everyone In' scheme during the Covid pandemic. Whilst this brought more homeless people into temporary accommodation, they now need suitable permanent accommodation to move on to, with many needing support alongside accommodation. Some are likely to have support needs around mental health issues including problems with addiction.

10.80 **Future trends:** There is a trend of increasing numbers of single homeless people in recent years and increasingly homeless people with complex needs at the national level. The latter can be attributed to the closure of some mental health units and reduced support for care leavers; a significant reduction in the number of supported housing bed spaces as a result in the reduction in supporting people funding; frozen LHA rates, welfare reform, and rising private rents.

## Young People Leaving Care

10.81 We have not been able to establish the population of looked after children or the population of 16-17 year old care leavers. It is likely that ESCC will hold relevant data which could be included in a future update if made available.

10.82 Just under half of supported lettings were to younger people aged 16-24. 21 of these lettings were to 16-17 year olds (likely to be care leavers) and therefore suggesting a small but significant level of need for supported accommodation for these vulnerable young people in the District.

## Aspirations for supported housing

10.83 Despite the wide range of different client groups and the individual needs of some clients within groups, discussions with practitioners and review of the evidence suggests that there are some common ingredients which clients (and their support workers or carers) need and aspire to from their home. It is interesting to note that these attributes are common aspirations of many other types of households who occupy mainstream housing:

- Spacious accommodation;
- Homes which are light and airy, making use of natural lighting;
- Outside space;
- Homes designed with a focus on wellbeing;
- A sense of community and mutual support;
- Integration of supported housing and its occupants with the wider community; and
- Space for carers to stay and/or space for therapeutic activities.

10.84 It is relevant to note that two-bedroom self-contained flats or clusters of houses are cited as useful accommodation for meeting a range of different needs. This type of accommodation can be used flexibly (e.g. to accommodate carers where required) and allow floating support to be provided efficiently. This type of accommodation is also attractive to other households and, as such, can be used flexibly to meet changing needs over time.

10.85 Other types of mainstream accommodation can also be used to provide supported housing. Providers of supported accommodation for homeless people have suggested that homes with 5-6 people are the best model for providing support and tend to deliver the best outcomes. There is no good reason why this type of accommodation cannot be provided within mainstream housing developments (e.g. using a standard 4/5 bed house typology); albeit some modifications may be required to the internal layout so that appropriate care and support can be provided and individuals afforded their own independence (e.g. own front doors, ensuite bathrooms to bedrooms etc).

## The Stock of Supported Housing

10.86 At the national level, the largest stock of supported housing caters for older people (Figure 10-16).

**Figure 10-16: Scale of Supported Housing Stock in England**

Client group	Total	Housing association	Local authority	Charity	Other
Older people (65+)	395,000	301,000	71,500	12,500	10,000
Single homeless people	30,000	26,500	500	2,500	500
Homeless families	5,500	5,000	*	500	*
Vulnerable young people (16-25)	19,500	12,500	1,000	5,000	1,000
Learning disabilities	38,500	24,500	2,000	5,500	6,500
Physical disabilities	9,000	6,000	500	1,000	1,500
Mental health problems	29,500	21,000	1,000	5,000	2,500
Drug or alcohol misuse needs	4,500	6,000	*	500	*
Offenders	4,500	4,000	*	500	*
At risk of domestic violence	4,500	4,000	*	500	*
Others	13,000	9,500	500	2,000	1,000
<b>Total</b>	<b>553,500</b>	<b>418,000</b>	<b>77,000</b>	<b>35,500</b>	<b>23,000</b>

Source: Local authority survey for Government Review of Supported Housing 2016<sup>91</sup>. \* indicates value less than 500. 'Other' client group includes refugees or asylum seekers etc.

10.87 For working age people, the largest number of units are provided for people with learning disabilities, followed by those with mental health needs. Data on the stock within Lewes District is not yet available and will be added to an updated report if more information can be provided.

10.88 The most common model is for the supported housing to be owned by a housing association. In some cases, the housing association may also provide the support to its tenants, but often this is provided by another organisation – often in the voluntary sector.

10.89 It is important to state that these figures include only support housing units or bed spaces and exclude care homes and other types of accommodation which accommodate people needing care and support.

10.90 Excluding the stock of supported housing for older people, the type of supported housing within the District includes:

- Shared accommodation within hostels;
- Shared accommodation within an ordinary residential property where clients are housed in independent flats or rooms with shared communal space; and
- Self-contained accommodation, largely provided as flats; Some are mixed blocks with different client groups, others focus on one client group

<sup>91</sup> <https://www.gov.uk/government/publications/supported-accommodation-review>

## Lettings of Supported Housing

10.91 In 2018 there were 154 lettings of supporting housing units within Lewes according to CORE, the majority (148) were affordable rented units. This is likely to be an incomplete picture of availability within the local authority area because it reflects only those units let by housing association landlords. The lettings data does not specify which client groups are housed and what time of support they need. However, some inferences can be drawn from the characteristics of the households and type of tenancies:

- Around half (81 homes) were let as assured tenancies (the most common tenancy in a social rented home);
- 73 lettings were license agreements which implies the accommodation is a hostel or shared accommodation rather than an independent unit;
- 62 lettings were to people aged 65 and over. However, the largest group entering supported housing in Lewes was younger people; and
- 69 lettings were to young people aged 16-24 and these are likely to have been young people leaving care (21 were 16-17 year olds) and young single and vulnerable homeless people; It is also likely that these individuals were accommodated in hostels or similar accommodation, corresponding to the 73 lettings with license agreements rather than tenancies.

10.92 It is relevant to note here that the latest PPG<sup>92</sup> adopts the following planning approach to accessibility and adaptability standards in new homes. These are likely to be beneficial, if not essential, to all of the vulnerable groups discussed here, as well as the older population of Lewes:

- Where an identified need exists, plans are expected to make use of the optional technical housing standards (footnote 49 of the National Planning Policy Framework) to help bring forward an adequate supply of accessible housing. In doing so, planning policies for housing can set out the proportion of new housing that will be delivered to the following standards:
  - M4(1) Category 1: Visitable dwellings (the minimum standard that applies where no planning condition is given unless a plan sets a higher minimum requirement);
  - M4(2) Category 2: Accessible and adaptable dwellings; and
  - M4(3) Category 3: Wheelchair user dwellings.
- Planning policies for accessible housing need to be based on evidence of need and viability, and a consideration of site-specific factors.
- A higher % of Cat 2 or 3 dwellings can be required by the LPA if there is good evidence of need and viability.

10.93 This could be appropriate in Lewes district due to the higher than average older population, even though the percentage of the population that is disabled in

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<sup>92</sup> Housing for Older and disabled people, Guidance June 2019, DLUHC; <https://www.gov.uk/guidance/housing-for-older-and-disabled-people>

Lewes is the same as the national average. LDC can also bring forward sites they own to provide accessible and adaptable dwellings as part of the Local Plan.

10.94 It is not AECOM's role to develop Local Plan policy. However, it is the study teams view that all new housing should be built to M4(2) standards (with any exceptions determined on a scheme by scheme basis), with a proportion of new homes built to M4(3), in line with local need on the Waiting List or national wheelchair use (3%).

## Summary

10.95 As part of this section, we have explored various evidence on the type of supported housing and accommodation that might be required by vulnerable people in Lewes. This includes evidence on the nature and scale of need within Lewes district and implications for future supply over the Local Plan period. The aim is to ensure that there is an adequate supply of suitable dwellings, including supported housing, provided to meet the needs of vulnerable people in the Local Plan area, for the period from 2020 to 2040.

10.96 Exploring the supported housing sector can be difficult, as it is fragmented, with different organisations responsible for supporting different groups. The need for accommodation and specific support or care needs are inherently interdependent. Those with significant care and support needs may be more likely to require a specialist setting rather than support within independent accommodation. The balance between the need for specialist accommodation versus mainstream housing is a function of the severity of care and support needs, the approach to care and support including the resources available, and the cost to the public purse.

10.97 Lewes district has an incidence of disability (18%) which is slightly below that of East Sussex (20%) and the same as that for England (18%) as a whole. Overall, we project a 20% increase in the disabled population over the plan period (4,646 additional persons).

10.98 By far the largest group of individuals who have a long-term health problem or disability is those aged over 65. However, the population aged 55-64 and over 65 appears to be healthier (in terms of incidence of long-term disabilities and health problems) than the same age population in England as a whole with 47% of over 65s having their data to day activities limited to some extent, compared to 52% in England. Therefore, whilst Lewes district has a slightly larger proportion of older persons as part of its population, that older population is healthier than the England average. Nevertheless, the largest group who will need care and support and, in some cases, specialist accommodation over the plan period, is older people (see also our previous section). Of the 27,674 persons who are projected to have a long-term health problem or disability by the end of the plan period in 2040, 65% (17,673 persons) will be aged 65 and over.

10.99 Of the Lewes district working age population, 4.68% (2,620 persons) claimed disability allowance in 2011, which is a slightly lower rate than across East

Sussex and England as a whole (5.23 and 4.89% respectively). Of the disabled working age people, the largest group of vulnerable people likely to need specialist accommodation is people with learning disabilities. The size of this group (adults with a learning disability) is expected to grow slightly over the plan period from 1,932 in 2020 -2,164 in 2040, according to PANSI data. Around one quarter (19-20% or 415 persons in 2040) of these people are predicted to have a moderate or severe learning disability and are hence may need to live in Supported Housing. There is also likely to be a potentially greater growth in demand for specialist accommodation than projected, in order to accommodate those moved out of care homes under Government and ESCC policy.

10.100 The population aged 18-64 with a mental health problem is projected to fall by about 1% from 2020-2040 in line with PANSI data (from 4,092-4,055). Furthermore, only a small proportion of these individuals are likely to need supported accommodation. However, whilst small and expected to fall in number over the long term, the group with mental health needs and needing supported accommodation may be more likely to grow in the short term due to the reduction in support for this group in recent years and the likely effects of economic recession (due to a range of economic shocks), the growing cost of living crisis, and the ongoing social impacts of the Covid-19 pandemic and its aftermath.

10.101 It is important to note that there is a much wider population of people in each client group than the number receiving support from the Council or from ESCC. Those with mild learning disabilities are unlikely to need care or accommodation, although they might receive support from families or other organisations to live independently. Similarly, the vast majority of those with physical disabilities live within mainstream housing and the majority are in employment. They may have care or specific accommodation needs but the majority are able to arrange these themselves, using their own resources or financial support provided by Disability Living Allowance (or similar benefits).

10.102 Similarly, there is a wider population of people who have care or accommodation needs, including older people, that are met by their family or perhaps by other organisations including charities. A further group of people with care and/or accommodation needs including older people arrange their own care within the private sector and are not currently under the care of ESCC. This might take a number of forms:

- Adapting their own property in minor ways to make life easier as mobility problems increase e.g. adding hand rails, replacing bathrooms, adding ramps to external doorways;
- Arranging for extra support to help with everyday tasks e.g. cleaning, shopping etc or carers provided by private organisations to help with dressing, bathing etc; or
- Arranging and paying for care and accommodation within a residential or nursing care home.

10.103 Despite the wide range of different client groups and the individual needs of some clients within groups, discussions with practitioners and review of the

evidence suggests that there are some common ingredients which clients (and their support workers or carers) need and aspire to from their home. It is interesting to note that these attributes are common aspirations of many other types of households who occupy mainstream housing.

10.104 It is relevant to note that two-bedroom self-contained flats or clusters of houses are cited as useful accommodation for meeting a range of different needs. This type of accommodation can be used flexibly (e.g. to accommodate carers where required) and allow floating support to be provided efficiently. This type of accommodation is also attractive to other households and, as such, can be used flexibly to meet changing needs over time.

10.105 Urgent needs have been identified for move on accommodation for homeless people and care leavers and supported accommodation for households with complex needs, including domestic abuse survivors.

# Appendix A : Local 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 = £200,000/£25,000 = 8, (the house price is 8 times income).

## **Affordable Housing (NPPF Definition)**

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) Affordable housing for rent: meets all of the following conditions: (a) the rent is set in accordance with the Government's rent policy for Social Rent or 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).

b) 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.

c) 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 methods<sup>93</sup>.

### **Age-Restricted General Market Housing**

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

### **Annual Monitoring Report**

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

### **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 Standard<sup>94</sup>**

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 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

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<sup>93</sup> The Tenant Services Authority has issued an explanatory note on these methods at <http://www.communities.gov.uk/documents/planningandbuilding/pdf/1918430.pdf>

<sup>94</sup> See <https://www.gov.uk/government/statistics/english-housing-survey-2011-to-2012-household-report>

space with others. In co-living schemes each individual represents a separate 'household'.

### **Community Led Housing/Community Land Trusts**

Housing development, provision and management that is led by the community is very often driven by a need to secure affordable housing for local people in the belief that housing that comes through the planning system may be neither the right tenure or price-point to be attractive or affordable to local people. The principle forms of community-led models include cooperatives, co-housing communities, self-help housing, community self-build housing, collective custom-build housing, and community land trusts. By bringing forward development which is owned by the community, the community is able to set rents and/or mortgage payments at a rate that it feels is appropriate. The Government has a range of support programmes for people interested in bringing forward community led housing.

### **Community Right to Build Order<sup>95</sup>**

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.

### **Concealed Families (Census definition)<sup>96</sup>**

The 2011 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 elderly 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.

### **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

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<sup>95</sup> See <https://www.gov.uk/guidance/national-planning-policy-framework/annex-2-glossary>

<sup>96</sup> See [http://webarchive.nationalarchives.gov.uk/20160107160832/http://www.ons.gov.uk/ons/dcp171776\\_350282.pdf](http://webarchive.nationalarchives.gov.uk/20160107160832/http://www.ons.gov.uk/ons/dcp171776_350282.pdf)

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**

The Government has recently confirmed the introduction of First Homes as a new form of discounted market housing which will provide a discount of at least 30% on the price of new homes. These homes are available to first time buyers as a priority but other households will be eligible depending on agreed criteria. New developments will be required to provide 25% of Affordable Housing as First Homes. A more detailed explanation of First Homes and its implications is provided in the main body of the LHNA.

### **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 Needs**

There is no official definition of housing need in either the National Planning Policy Framework or the National Planning Practice Guidance. Clearly, individuals have their own housing needs. The process of understanding housing needs at a population

scale is undertaken via the preparation of a Strategic Housing Market Assessment (see below).

### **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 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 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 Local Plan area 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/>.

## **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 housing need (NPPF definition)**

The number of homes identified as being needed through the application of the Standard Method set out in national planning guidance (or, in the context of preparing strategic policies only, this may be calculated using a justified alternative approach as provided for in paragraph 60 of this Framework).

## **Local Housing Needs Assessment**

A Local Housing Needs Assessment (LHNA) is an assessment of housing needs at the Local Plan level.

## **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 years<sup>97</sup>, 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 the very frail elderly, 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.

### **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**

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<sup>97</sup> See <https://www.which.co.uk/news/2017/08/how-your-income-affects-your-mortgage-chances/>

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 developing a Local Plan, sufficient so as to meet the requirements of national legislation, policy, and guidance, 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 Local 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, which will have included some benefit claimants whose housing benefit at the time was paid directly to their landlord. 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.

### **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 Housing<sup>98</sup>**

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 usually contain between 15 and 40 properties, and range in size from studio flats (or 'bedsits') through to 2 and 3 bed roomed. 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 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 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 (NPPF 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

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<sup>98</sup> See <http://www.housingcare.org/jargon-sheltered-housing.aspx>

of the NPPF, usually across administrative boundaries to encompass the whole housing market area. The NPPF makes clear that SHMAs should identify the scale and mix of housing and the range of tenures the local population is likely to need over the 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 the Elderly**

Specialist housing for the elderly, sometimes known as specialist accommodation for the elderly, 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.<sup>99</sup>

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<sup>99</sup> See <http://www.communities.gov.uk/documents/planningandbuilding/doc/1980960.doc#Housing>

# Appendix B: Adopted policies in the Lewes development plan

**Table B-1: Summary of relevant elements of adopted policies in the Lewes development plan**

Source	Policy / Provision	Provisions
Joint Core Strategy 2010-2030 – Local Plan Part 1	<b>Spatial Policy 1</b> - Provision of housing and employment land	In the period between 2010 and 2030, a minimum of 6,900 net additional dwellings are to be provided in the joint plan area (this is the equivalent of approximately 345 net additional dwellings per annum).

**Table 4 –**  
Housing to be planned for

	(A) Total requirement	(B) Already developed in the plan period (April 2010 – April 2013)	(C) Units permitted, but not yet implemented (includes units under construction)	(D) Units considered deliverable having made sufficient progress through the planning process <sup>17</sup>	(E) Unimplemented Local Plan allocations for housing <sup>18</sup>	Residual requirement to plan for (A – B, C, D & E)
Housing (within the National Park)	Plan – wide requirement:	220	142	0	0	Plan – wide requirement:
Housing (outside of the National Park)	6,900	800	1131	183	102	4,322

**Spatial Policy 2** – Distribution of Housing  
Part of this total (the above 6,900 net additional dwellings) will be met as follows:

- 1,020 completions April 2010 and April 2015
- Delivery of 1,558 commitments across the plan area
- Allowance for 600 dwellings to be permitted on unidentified small-scale windfall sites during plan period
- Allowance for 125 dwellings to be permitted on rural exception sites during plan period.

Remaining 3,597 net additional dwellings to be distributed as follows:

- 1) Housing on strategic site allocations;
  - o Land at North Street, Lewes – 415 net additional units
  - o Land at Old Malling Farm, Lewes – 240 net add. units
  - o Land to north of Bishops Lane, Ringmer – 110 net add. units

Source	Policy / Provision	Provisions
		<ul style="list-style-type: none"> <li>o Land at Greenhill Way, Haywards Heath (Wivelsfield Parish) – 113 net add. units (in addition to 62 units already permitted)</li> <li>o Land at Harbour Heights, Newhaven – 400 net add. units</li> <li>o Land at Lower Hoddern Farm, Peacehaven – 450 net add. units.</li> </ul> <p>(2) Planned housing growth at the following settlements;</p> <ul style="list-style-type: none"> <li>o Lewes – minimum 220 net add. units</li> <li>o Newhaven – minimum 425 net add. units</li> <li>o Peacehaven &amp; Telscombe – minimum 255 net add. units (contingent on package of multi-modal transport measures required to mitigate impacts of development on A259)</li> <li>o Seaford – minimum 185 net add. units</li> <li>o Burgess Hill (Wivelsfield Parish) – min. 100 net add. units</li> <li>o Barcombe Cross – minimum 30 net add. units</li> <li>o North Chailey – minimum 30 net add. units</li> <li>o South Chailey – minimum 10 net add. units</li> <li>o Cooksbridge – minimum 30 net add. units</li> <li>o Ditchling – minimum 15 net add. units</li> <li>o Newick – minimum 100 net add. units</li> <li>o Plumpton Green – minimum 50 net add. units</li> <li>o Ringmer &amp; Broyle Side – minimum 215 net add. units</li> <li>o Wivelsfield Green – minimum 30 net add. units.</li> </ul> <p>(3) About 200 net additional units in locations to be determined. For housing growth identified in sections (2 &amp; 3), individual sites to meet planned levels of housing provision will be identified in either the Site Allocations and Development Management Policies DPD, SDLP, or Neighbourhood Plans.</p> <p>For settlements or development not listed in sections (2) or (3) new housing will be limited to affordable housing that meets local need on exception sites and currently unidentified infill developments within the planning boundary.</p>

**Source**                      **Policy / Provision**                      **Provisions**

**Table 5 –**  
Planned levels of housing growth, by settlement

Settlement (NP denotes it is in the National Park)	Completions (April 2010 – April 2015)	Commitments (as at 1 <sup>st</sup> April 2015)	Housing delivered on strategic sites	Housing to be delivered through subsequent allocations	Total
Edge of Haywards Heath (within Wivelsfield Parish)	0	62	113	0	175
Seaford	216	153	0	184	553
Lewes (NP)	146	125	655	220	1146
Newhaven	66	786	400	425	1677
Peacehaven & Telscombe	332	189	450	253	1224
Edge of Burgess Hill (within Wivelsfield Parish)	70	27	0	100	197
Ringmer & Broyle Side	6	52	110	217	385
Newick	27	2	0	100	129
Barcombe Cross	2	1	0	30	33
Plumpton Green	15	5	0	50	70
Wivelsfield Green	17	76	0	30	123
Cooksbridge	5	3	0	30	38
North Chailey	3	0	0	30	33
South Chailey	3	1	0	10	14
Ditchling (NP)	10	6	0	15	31
All other settlements and areas	102	70	0	0	172
<b>Totals</b>	<b>1020</b>	<b>1558</b>	<b>1728</b>	<b>1694</b>	<b>6000</b>

**The windfall sites allowance of 600 units and the rural exceptions sites allowance of 125 units are not accounted for in the table above.**

**Spatial Policy 3** 9 ha. land allocated for mixed-use development – North Street Quarter and adjacent Eastgate area, Lewes including approximately 415 residential units, a C2/C3 Nursing/ Care Home (self-contained units will be counted as residential within the above figure) and other non-residential uses, subject to list of criteria. Delivery 2016-2021.

**Spatial Policy 4** Approx. 10 ha allocated for delivery of – Old Malling Farm, Lewes approximately 240 dwellings, subject to listed criteria incl. that 40% of dwelling units are affordable, subject to terms of CP1.

**Spatial Policy 5** 8.5 ha is allocated for residential development of – Land at Greenhill Way/Ridge Way, Haywards Heath (within approx. 175 dwellings (of which 62 net units already permitted). subject to compliance with listed criteria.

Source	Policy / Provision	Provisions														
	Wivelsfield Parish)															
	<b>Spatial Policy 6</b> – Land north of Bishops Lane, Ringmer	4.4 ha. allocated for residential development of approx. 110 dwellings subject to listed criteria.														
	<b>Spatial Policy 7</b> – Land at Harbour Heights, Newhaven	20 ha. allocated for mixed-use development of approx. 400 dwellings subject to listed criteria incl. min. 30% affordable housing in accordance with Core Policy 1.														
	<b>Spatial Policy 8</b> - Land at Lower Hoddern Farm, Peacehaven	11 ha. allocated for residential development of approx. 450 dwellings subject to compliance with listed criteria.														
	<b>Core Policy 1 – Affordable Housing</b>	<p>1. District wide target of 40% affordable housing, including affordable rented and intermediate housing, sought for developments of 10+ dwellings. For developments of less than 10 units, affordable housing is sought according to stepped target &amp; threshold below:</p> <table border="1" data-bbox="663 1182 1254 1547"> <thead> <tr> <th colspan="2">Affordable Housing Target/Threshold</th> </tr> <tr> <th>Scheme size (Units)</th> <th>Affordable housing (Units)</th> </tr> </thead> <tbody> <tr> <td>1 - 2</td> <td>0</td> </tr> <tr> <td>3 - 4</td> <td>1</td> </tr> <tr> <td>5 - 7</td> <td>2</td> </tr> <tr> <td>8 - 9</td> <td>3</td> </tr> <tr> <td>10+</td> <td>40%</td> </tr> </tbody> </table> <p>2. Affordable housing requirement may exceptionally be determined on a site-by-site basis where justified by market and/or site conditions. Target levels expected to be provided by all developments of 3 + (net) units (including conversions and subdivisions) unless the LPA is satisfied by robust financial viability evidence.</p> <p>3. Guideline affordable housing tenure split is 75% affordable rented/25% intermediate (shared ownership).</p>	Affordable Housing Target/Threshold		Scheme size (Units)	Affordable housing (Units)	1 - 2	0	3 - 4	1	5 - 7	2	8 - 9	3	10+	40%
Affordable Housing Target/Threshold																
Scheme size (Units)	Affordable housing (Units)															
1 - 2	0															
3 - 4	1															
5 - 7	2															
8 - 9	3															
10+	40%															

Source	Policy / Provision	Provisions										
	<b>Core Policy 2</b> – Housing Type, Mix and Density	<p>Housing developments (market and affordable) are expected to:</p> <ol style="list-style-type: none"> <li>1. Provide a range of dwelling types and sizes to meet identified local need, based on best available evidence. This will generally include 1- and 2-bed homes for single person households and couples with no dependents. Account will also need to be given to the existing character and housing mix of the vicinity and, where appropriate, setting, purpose, and duty of the SDNP.</li> <li>2. Provide flexible, socially inclusive and adaptable accommodation to help meet diverse needs of the community and changing needs of occupants over time. Need will include accommodation appropriate for the ageing population and disabled residents.</li> <li>3. Reflect the site context incl. character, accessibility, size and type of dwellings needed in the locality, to achieve densities in the region of 47 to 57 dph for towns and 20-30 dph for the villages. Higher or lower densities may be justified by the specific site character / context. Densities on allocated sites are indicated in allocation.</li> <li>4. Where appropriate, the LPA will identify sites and requirements for special needs housing (e.g. nursing homes, retirement homes, people with special needs including physical and learning disabilities, specific requirements of minority groups etc) in Site Allocations &amp; Development Management Policies DPD and SDLP.</li> </ol>										
	<b>Core Policy 3</b> – Gypsy and Traveller Accommodation	<p>Provision will be made for a net total of 13 additional permanent pitches for Gypsies and Travellers to serve needs 2014 - 2030. Of these 5 pitches will serve needs of area outside SDNP and 8 for needs within SDNP.</p>										
Lewes Local Plan Part 2: Site allocations and development	<b>Local Plan Part 2, Table 1</b>	<p><i>Table 1 Housing requirement numbers of Spatial Policy 1</i></p> <table border="1"> <thead> <tr> <th colspan="2" data-bbox="671 1845 1449 1883">Separated housing number table</th> </tr> <tr> <th data-bbox="671 1899 1134 1937">Plan</th> <th data-bbox="1145 1899 1449 1937">Housing requirement figure</th> </tr> </thead> <tbody> <tr> <td data-bbox="671 1953 1134 1991">Local Plan Part 1</td> <td data-bbox="1145 1953 1449 1991">6,926</td> </tr> <tr> <td data-bbox="671 1998 1134 2051">Local Plan Part 1 (outside the National Park)</td> <td data-bbox="1145 1998 1449 2051">5,494</td> </tr> <tr> <td data-bbox="671 2058 1134 2096">South Downs National Park Local Plan</td> <td data-bbox="1145 2058 1449 2096">1,432</td> </tr> </tbody> </table>	Separated housing number table		Plan	Housing requirement figure	Local Plan Part 1	6,926	Local Plan Part 1 (outside the National Park)	5,494	South Downs National Park Local Plan	1,432
Separated housing number table												
Plan	Housing requirement figure											
Local Plan Part 1	6,926											
Local Plan Part 1 (outside the National Park)	5,494											
South Downs National Park Local Plan	1,432											

**Source**                      **Policy /**  
**management**                **Provision**  
**policies**

**Table 2***Table 2 Housing requirement outside the National Park*

<b>Housing requirement and supply (outside the National Park)</b>	
<b>Local Plan Part 1 housing requirement</b>	<b>5,494</b>
Built or committed, as at 1 April 2015	2,216
Housing supply from strategic allocations	1,073
Supply from windfall allowance	468
Supply from rural exception sites allowance	77
<b>Residual requirement outside the National Park</b>	<b>1,660</b>

**Table 3***Table 3 Planned level of housing, outside the National Park (2019)*

Settlement	SP2 Planned housing growth	Neighbourhood Plan housing (adopted and emerging)	Residual housing growth to be identified in LPP2
Newhaven	425	425	-
Peacehaven & Telscombe	255	255	-
Seaford	185	185	-
Edge of Burgess Hill (within Wivelsfield Parish)	100	0	100
Barcombe Cross	30	0	30
North Chailey	30	0	30
South Chailey	10	0	10
Cooksbridge	30	0	30
Newick	100	100	-
Plumpton Green	50	68	-
Ringmer & Broyle Side	215	183	32
Wivelsfield Green	30	34	-
To be determined	200	-	200
<b>Total</b>	<b>1,660</b>	<b>1,250</b>	<b>432</b>

KEY	
	Housing growth to be delivered through neighbourhood plans
	Housing growth identified in 'made' neighbourhood plans
	Housing growth identified in Local Plan Part 2

**Table 4***Table 4 Growth identified in Local Plan Part 2*

Settlement	Committed/ Delivered since April 2015	To be allocated in LPP2
Edge of Burgess Hill (within Wivelsfield Parish)	81	19
Barcombe Cross	0	30
North Chailey	14	16
South Chailey	0	10
Cooksbridge	27	3
Ringmer & Broyle Side	0	32
To be determined	183	17
<b>Total</b>	<b>305</b>	<b>127</b>



Source	Policy / Provision	Provisions
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**Table 5***Table 5 Allocation requirements for Local Plan Part 2*

Settlement	Housing growth to be identified in LPP2	Units allocated in LPP2
Edge of Burgess Hill (within Wivelsfield Parish)	19	14
Barcombe Cross	30	42
North Chailey	16	16
South Chailey	10	10
Cooksbridge	3	0
Ringmer and Broyle Side	32	50
To be determined	17	0
<b>Total</b>	<b>127</b>	<b>132</b>

<b>Policies in Chapter 3</b>	Set out the terms for the various allocations for housing in the different District settlements.
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<b>Policies DM1 etc from Chapter 4 onwards</b>	These policies are Development Management policies, which are less relevant to the purposes of our study.
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## Appendix C: Definition of Geographies in this LHNA

This Appendix provides maps and statistical area definitions of the geographies (and benchmark areas) used in this report.

### 1. Lewes District: whole LA area, searchable on NOMIS



### South Downs National Park

The National Park boundary does not reflect any administrative or standard boundary as the designation is landscape-based rather than population or politically-based. Therefore many of the datasets we would normally use to prepare a LHNA are not readily available specifically for the SDNP area.

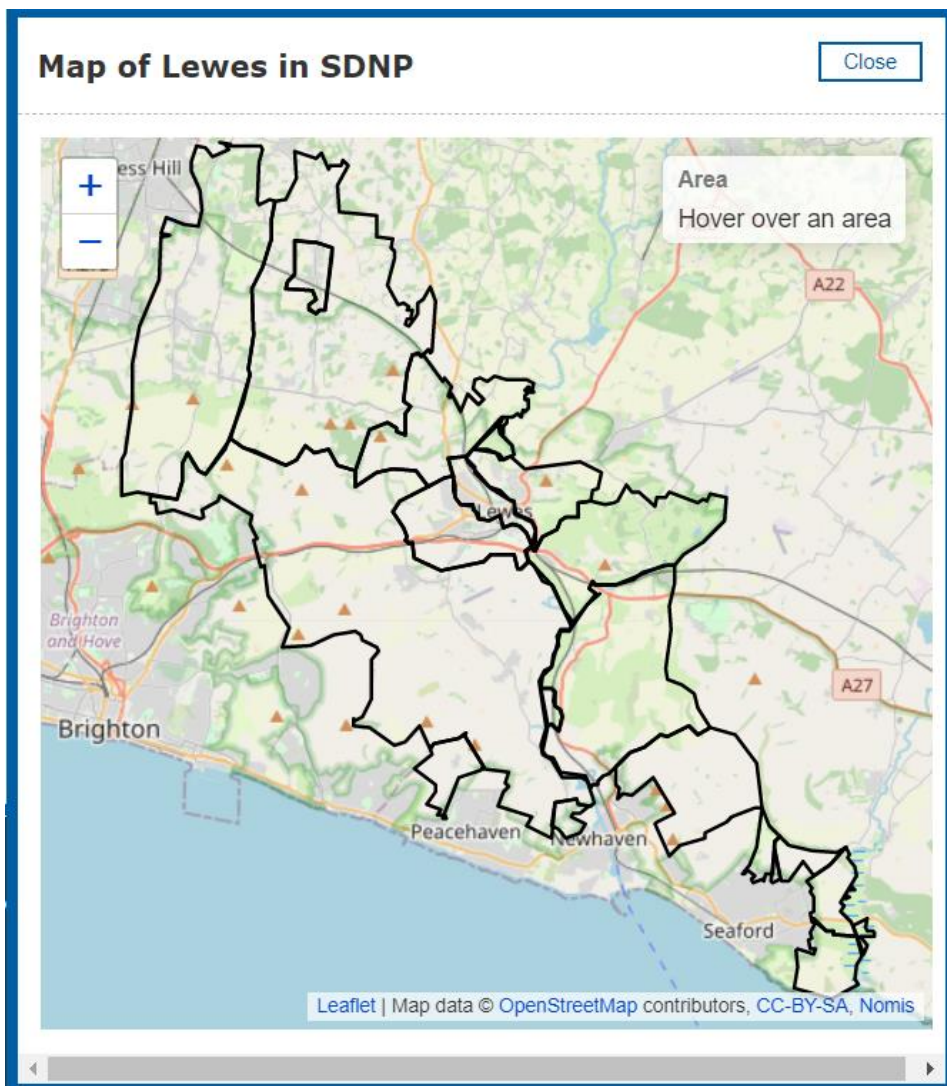
There is some limited data, which is taken from the census, which accurately reflects the SDNP Boundary. Where possible we have used this data as a first choice. Where specific data is not available for the South Downs Local Plan (SDLP), we have therefore developed a geography based on aggregating Middle Super Output Areas (MSOA) data to reflect a “best fit” to the SDNP. However this geography, by its nature, extends slightly beyond the SDNP boundary and any data relating to it would not exactly correspond with the National Park. Indeed it captures a number of villages and built development which are outside the National Park. Specific statistics should therefore be treated with a degree of caution.

Note on Geographies - <https://www.southdowns.gov.uk/wp-content/uploads/2015/09/SDNP-SHMA-2015.pdf>

### 2. Lewes outside SDNP – subtract inside SDNP figures from Lewes District (see below)

### 3. Lewes inside SDNP - Individual selections:

- 2011 super output area - middle layer
  - E02004381 : Lewes 003
  - E02004383 : Lewes 005
  - 2011 output area
    - E00106768
    - E00106925
    - E00106927
    - E00106944
    - E00107022
    - E00107028
    - E00107050
    - E00167675
    - E00167676
    - E00106911
    - E00106803
  - 2011 super output area - lower layer
    - E01021026 : Lewes 002B
    - E01021032 : Lewes 002C
    - E01021067 : Lewes 002D
    - E01021068 : Lewes 002E



**Figure I Administrative Boundaries throughout the South Downs National Park**



<https://www.southdowns.gov.uk/wp-content/uploads/2018/04/SDLP11-Duty-to-Cooperate-Statement.pdf>

**4. Greater Brighton HMA – Greater Brighton includes the LA areas of Brighton & Hove, Adur, Worthing, Lewes, and Mid Sussex.**

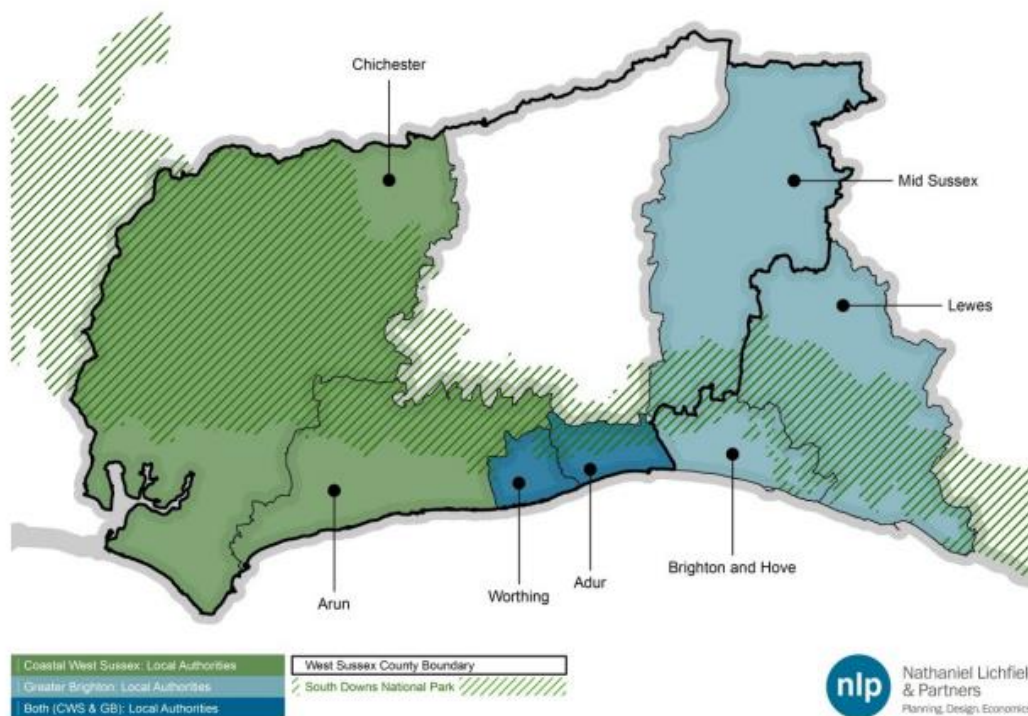
<https://coastalwestsussex.org.uk/wp-content/uploads/2016/10/14288-GBCWS-Background-Paper-2-Housing-290515.pdf>





**5. Greater Brighton & Coastal West Sussex Market Strategic Planning Board Area – whole Council areas of Adur, Arun, Chichester, Worthing, Horsham, Mid-Sussex, Crawley, West Sussex County Council, Brighton & Hove City Council, Lewes, SDNP – bold and red should be searched on NOMIS to get the area**

Figure 1.1 Spatial Definition of Greater Brighton and Coastal West Sussex



<https://coastalwestsussex.org.uk/wp-content/uploads/2016/10/14288-GBCWS-Background-Paper-2-Housing-290515.pdf>



**6. South East – searchable on NOMIS**



7. England – searchable on NOMIS

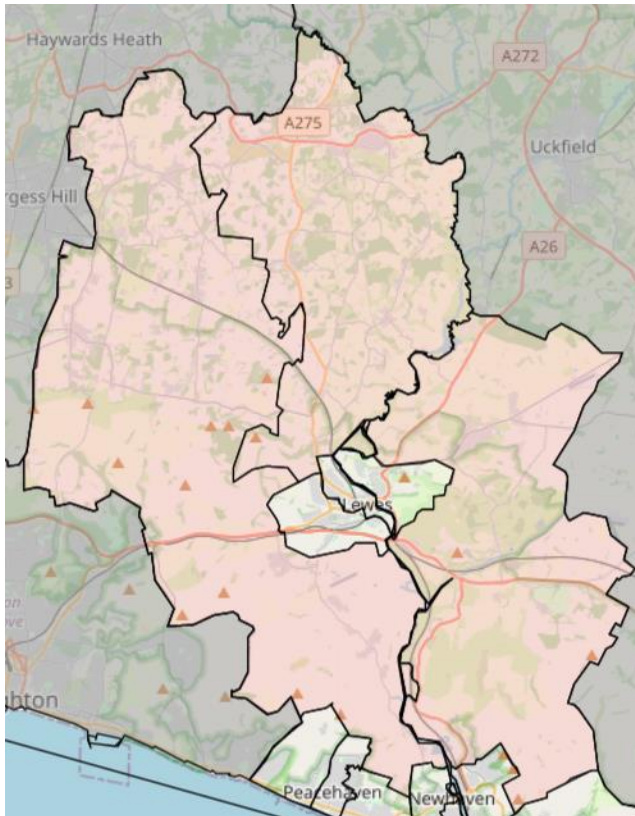


**Sub Areas** – These have been determined through a best fit according to NOMIS mapping and discussed and agreed with LDC.

**8. Coastal Area – MSOA E02004384, MSOA E02004385, MSOA E02004386, MSOA E02004387, MSOA E02004388, MSOA E02004389, MSOA E02004390, MSOA E02004391**



### 9. Rural Area – MSOA E02004379, MSOA E02004380, MSOA E02004382





### 10. Lewes Town – MSOA E02004381 and MSOA E02004383

