PPL

Headline findings

East Sussex supported and specialist housing needs assessment

November 2026

About the supported housing needs assessment

An evidence base for supported and specialist housing strategy and commissioning in East Sussex

What it is

An assessment of current supported housing provision and need, projecting the gap over five and ten years (to 2032 and 2037) for each group of people requiring supported housing.

Who is doing it

Delivered by PPL with Cordis Bright for a partnership of 15 Sussex local authorities, led by ESCC, working with the five East Sussex district and borough councils.

Why

To inform local supported housing strategies, commissioning and investment, and to prepare for local strategy and licensing duties under the Supported Housing (Regulatory Oversight) Act 2023.

Care Act eligible groups

Adults known to Adult Social Care, each allocated to one cohort by primary support reason

- **Mental health**
- **Learning disabilities**
- **Working-age adults: physical disability, long-term conditions or sensory needs**
- **Older people aged 65+**

Transitional groups

To avoid double counting, each person is counted once, in the first group that applies:

1. **Young people:** everyone aged under 25, regardless of other needs
2. **Domestic abuse:** aged 25+, homeless mainly due to domestic abuse

Analysed and reported separately

3. **Prison leavers:** aged 25+ and homeless on leaving custody
4. **Substance misuse:** aged 25+ with drug or alcohol dependency
5. **Single homelessness:** other adults aged 25+ owed a homelessness duty

Supply and gap analysed together, as provision is shared

Care Act eligible groups

How we have estimated future need: Care Act eligible groups

A common approach across the four Care Act eligible groups

1

Map current position

July 2026 ASC snapshot: each person's current setting and support needs.

2

Estimate unmet need

Model potential alternative settings, drawing on cost indicators, benchmarking and validation. Suggest lower- and higher-change scenarios.

3

Project future demand

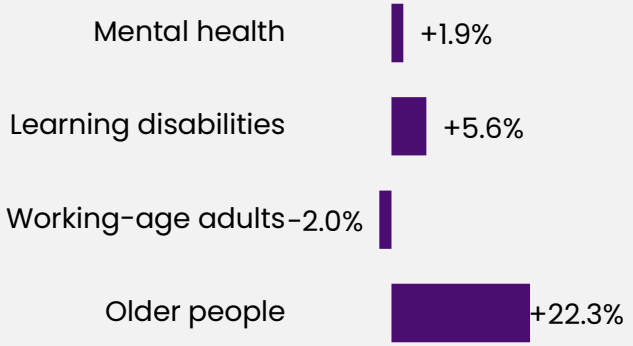
Apply PANSI/POPPI cohort projections to the current populations.

4

Compare with supply

Compare demand in 2026, 2032 and 2037 with known supported housing capacity.

Population growth assumptions to 2037



Both scenarios modelled start from the same 2026 cohort; they differ in assumptions about accommodation pathways, not population growth.

Mental health

Improve flow and target specialist gaps

1,283
Adults receiving ASC support

294
Currently in in-area supported accommodation

260–280
Modelled in-area supported places needed, 2037

Residential-care balance. The long-term shift towards supported housing is considered largely complete; current residential-care use is relatively low against comparator areas.

Move-on bottleneck. Limited access to affordable general-needs housing and floating/tenancy support can keep people in supported accommodation longer than needed.

Complex needs. Targeted gaps persist for people with overlapping mental health, autism and substance-use needs, including repeated crises and placement breakdowns.

Hospital discharge. Commissioners identify a gap in dedicated step-down/reablement, although note that delayed discharge does not appear to be worse in ESCC as a result.

Learning disabilities

Continue the direction of travel towards supported living

1,635
Adults receiving ASC support

417
Currently in in-area supported accommodation

550–690
Modelled in-area supported places needed, 2037

An ongoing shift towards supported accommodation. High residential-care use reflects longstanding placements, whereas current commissioning considers supported living first, especially for younger adults. This is likely to mean a further shift will be seen between residential care and supported accommodation in future years. There is also likely to be ongoing pressure from an ageing population of carers.

A flexible supported accommodation offer. A flexible mix of shared, self-contained and accessible provision remains important.

Supporting resilience. Wrap-around support is important to prevent breakdown of settled placements, including in Shared Lives, if needs escalate.

Working-age adults

Accessible mainstream housing is the overriding gap

1,107
Adults receiving ASC support

66
Currently in supported accommodation

40–65
Modelled in-area supported places, 2037

Accessible ordinary homes. For most people with physical disabilities, long-term conditions or sensory impairments, adapted mainstream housing with care is preferable to specialist housing.

Blocked pathways. A shortage of suitable level-access/adaptable homes can prolong stays in residential care, extra care or supported accommodation.

Targeted specialist provision. Smaller-scale accessible supported housing is still needed for people whose more complex needs cannot be met in mainstream settings.

Flexible tenancy support. Some neurodivergent adults require rapid, responsive help with sustaining a tenancy rather than permanent supported housing.

Older people

Ageing pressures create a strategic choice about extra care

4,161
Older adults receiving ASC support

300
Estimated to be currently in extra care

420–880
Modelled extra-care places required, 2037

Growing need for all types of accommodation. The population is projected to reach over 5,000 by 2037 (+22%), increasing demand for both residential care and other housing-with-care options.

Residential care remains important. About 45% are currently in residential/nursing care; commissioners support the present balance relative to comparator areas.

Extra care has the widest range. Modelled demand implies a potential gap of 120–580 places by 2037.

Future ambition determines the gap. The upper estimate assumes a greater shift towards extra care than current local practice and waiting-list evidence would imply is needed – using national survey data that suggests 14% of those living at home would like to live in some form of designated accommodation for older people. **There is not currently appetite in ESCC for an expansion of extra care**, however, and current demand does not appear to align with this potential scale of need.

Cross-cutting gap analysis: Care Act eligible groups

Modelled need compared with current identified supply

Supported accommodation
Estimated current supply: 1,164 places

Year	Low-shift: places required	Low-shift: gap vs current	High-shift: places required	High-shift: gap vs current
2026	879	-285	963	-201
2032	899	-265	990	-174
2037	919	-245	1,011	-153

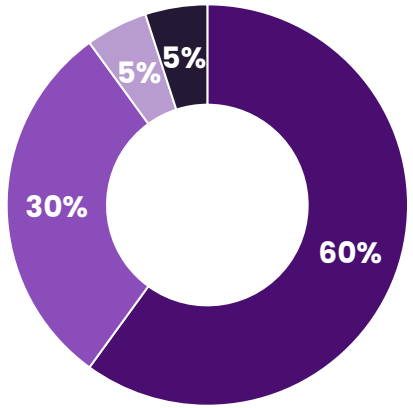
Extra care
Estimated current supply: ~300 places

Year	Low-shift: places required	Low-shift: gap vs current	High-shift: places required	High-shift: gap vs current
2026	357	+57	747	+447
2032	394	+94	840	+540
2037	423	+123	910	+610

All gaps compare modelled demand with current estimated supply; they are not counts of currently vacant or ready-to-use places. A negative figure means modelled demand is below current supply.

Indicative future supported accommodation mix

Suggested breakdown of modelled 2037 demand



- Self-contained (60%)
- Small shared / clustered (30%)
- Bespoke / high-stability (5%)
- Enabling / step-down (5%)

Accommodation model	Share	2037 need	Indicative role
Self-contained	60%	550–610	Privacy, independence and choice
Small shared / clustered	30%	280–300	Shared support and social connection
Bespoke / high-stability	5%	46–51	Particularly complex or enduring needs
Enabling / step-down	5%	46–51	Recovery and transition to independence

These are total modelled places, not additional units. The existing shared/self-contained mix is not known reliably across the wider market; figures are rounded.

Overarching implications for the strategy: Care Act eligible groups

The priority is to improve suitability and pathways, not simply increase units

1 Ensure a diverse and flexible supported accommodation offer

Agree strategic ambition on the mix of shared, self-contained and specialist accommodation, while maintaining staffing and support models that can respond to different and changing needs.

2 Improve access to mainstream housing

- Strengthen housing allocation and move-on arrangements through joint working with district councils and providers, e.g. exploring reciprocal arrangements and housing-register prioritisation.
- Improve the availability and allocation of accessible housing through closer coordination between housing, planning and OT teams, and better use of existing stock.
- Explore more flexible use of DFG funding to improve housing suitability.
- Ensure consistent, person-centred move-on support across settings.

3 Target specialist gaps

Consider a bespoke commissioned supported accommodation offer for people with more complex needs, alongside boosting flexible wrap-around support for other settings.

4 Continue to monitor the role of extra care

An expansion of extra care is not currently a strategic priority. Monitoring of demand should continue to assess whether this will need to change as the population of older adults in ESCC grows.

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Young people and care leavers

How we have estimated future need: young people

From current provision, unmet need and move-on to required supported housing capacity

1

Map current provision

Use ESCC capacity, commissioning and care leaver data to identify young people in dedicated supported accommodation.

2

Estimate unmet need and move-on

Care leavers in unsuitable homes and young people sleeping rough, in TA or in mixed-age housing; plus those ready to move on.

3

Project newly arising demand

Estimate annual new demand from 2025/26 admissions and homelessness flows, then apply 18–24 population projections.

4

Convert demand to capacity

Apply an ideal setting mix and planning lengths of stay; compare total required capacity with current supply.

Population growth assumption

+11.0%

Projected growth in the 18–24 population by 2032,

falling back to

+4.3%

by 2037

Covers care leavers aged 18–24 (including former unaccompanied asylum-seeking children) and homeless young people aged 16–24; everyone under 25 is counted here.

Young people: current provision and unmet need

A strong existing offer, but it is at capacity and some young people's needs are not being met

277
Young people currently in dedicated supported accommodation

142
Estimated current unmet need

70%
of referrals into core ESCC-commissioned provision initially found no vacancy available

A relatively extensive offer. East Sussex has a strong network of foyers and staffed young people's accommodation compared with other areas, and commissioners rate the support positively.

The scale of unmet need. The 142 draws on four indicators: care leavers in unsuitable accommodation (30), young people in temporary accommodation who need support (90), young people in mixed-age adult supported housing (16) and young people sleeping rough (6). It is an indicative estimate, as sources cover different periods and some overlap may remain.

Consultation suggests further need not counted. Foyers are reported to be effectively always full, with no central waiting list. Commissioners struggle to place 10–15 young people with complex needs at any one time, and some living independently or with family may lack suitable alternatives.

Support is not always flexible enough. Key-work cannot easily increase when needs or risks escalate, and shared facilities are not always suitable.

Greater geographical choice is needed. Provision is concentrated in Hastings, Eastbourne and Newhaven; town-centre locations can be risky for some vulnerable young people.

Young people: move-on and future demand

Improving flow through the pathway is as important as adding capacity

42
Young people ready to move on from supported accommodation

303
Annual new demand | 2026

+33
Change in annual new demand by 2032 (to 336)

+13 by 2037 (to 316)

Move-on is the main bottleneck. An estimated 42 young people (17% of core provision) are ready to move on. A lack of affordable settled housing, differing district allocation arrangements and barriers in the private rented sector hold them back.

Stays often run longer than intended. 27% of young people leaving commissioned accommodation in 2025/26 had stayed beyond 18 months, with some staying three to four years, restricting access for those waiting to enter.

Demand peaks around 2032. Projections follow the 18–24 population, which grows by 11% to 2032 before falling back. Care leaver numbers have stabilised (638 in March 2026), so no additional growth is assumed.

Proposed ideal setting mix: young people

A more graduated pathway, with more step-down options and a small Youth Housing First offer

Setting	Current mix	Ideal mix	Change	Rationale
Foyers / higher-intensity	44%	35%	-9pp	Some stay in intensive settings when ready for more independence. Share falls as other options grow; capacity is not reduced.
Young people's supported accommodation – low/medium	29%	29%	0pp	Structured support remains important for building independent living skills.
Step-down / dispersed accommodation	15%	22%	+7pp	Too few lower-support and move-on options, e.g. trainer flats; would ease foyer bottlenecks.
Family-type accommodation (e.g. Staying Put)	12%	12%	0pp	Staying Put remains important; possible gap in supported lodgings for 18–19-year-olds.
Youth Housing First	0%	2%	+2pp	Gap for young people with complex needs or risks; explored locally but not yet agreed.

*These setting types mirror the St Basil's **Positive Pathway framework.** The framework aims to identify young people early, help them at the lowest appropriate level, give rapid access to suitable accommodation when needed, and support them to move into and keep a settled home.*

Not yet modelled: stakeholders also identified a need for **bespoke higher-support provision** for young people with complex needs or risks (e.g. exploitation, offending, neurodivergence) who may not meet Care Act thresholds; **intermediate provision** for those leaving intensive under-18 placements; and simpler, **lower-expectation accommodation**.

Gap analysis: young people

A significant gap is already evident by 2032, driven by existing unmet need rather than population growth

Type of accommodation / support	Length of stay	2026 current	2032 required	2032 gap	2037 required	2037 gap
Foyers / higher-intensity	1.5 years	122	177	+55	166	+44
Young people's supported accommodation – low/medium	1.5 years	81	147	+66	138	+57
Step-down / dispersed accommodation	2 years	42	148	+106	140	+98
Family-type accommodation	3 years	32	121	+89	114	+82
Youth Housing First	10 years	0	68	+68	64	+64
Total	**–**	**277**	**661**	**+384**	**622**	**+345**

Assumes current unmet need (142) is met before 2032 and that 42 young people ready to move on do so. Required capacity falls slightly by 2037 as the 18–24 population declines after peaking around 2032. Figures are planning estimates, not a phased development target.

Lengths of stay are ideal planning assumptions: actual stays often exceed those intended – 27% of young people leaving commissioned accommodation in 2025/26 had stayed beyond 18 months.

Strategic implications and priorities: young people

Where should East Sussex concentrate effort and development?

Key challenge: additional capacity cannot be considered separately from how well young people move through the existing pathway.

1 Strengthen routes into affordable settled housing	Work with district and borough councils on care leaver access to social housing and more consistent allocations; engage housing associations and private landlords.
2 Ensure support can follow young people into independent homes	More flexible floating support, alongside personal advisers and tenancy-readiness work, to enable earlier moves and reduce tenancy breakdown.
3 Gradually diversify the accommodation pathway	More step-down and dispersed options, such as trainer flats and self-contained tenancies with visiting support, through pilots or adapting existing provision.
4 Explore tailored responses for complex needs and risks	Joint work across Children's Services, housing and Adult Social Care; options include small bespoke settings, intermediate provision and Youth Housing First.

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Domestic abuse

How we have estimated future need: domestic abuse

Demand is measured in episodes of support, including onward moves between settings

1

Map current provision

Capacity and occupancy of the mainstream and multiple compound needs (MCN) safe accommodation services.

2

Estimate current unmet need

A one-off snapshot of victim-survivor households in temporary accommodation.

3

Estimate annual episodes

Admissions to safe accommodation, plus referrals not admitted (excluding inappropriate ones), plus onward moves between settings.

4

Convert demand to capacity

Apply an illustrative setting mix and planning lengths of stay; compare required capacity with current supply.

Population growth assumption

+10.4%

Projected growth in the 25+ population, 2026–2036 (JSNA), equal to about 1% a year

Same figure as used for the other adult transitional groups.

Covers adults aged 25+ and their dependants who need safe accommodation because of domestic abuse; under-25s are counted in the young people cohort. Estimates may be subject to change.

Domestic abuse: current provision and unmet need

Unmet need sits alongside vacancies – the challenge is access and suitability, not just capacity

63

Safe accommodation places: **51 mainstream** and **12 MCN**

79% | 31%

Occupancy last quarter in mainstream and MCN services, against a 95% target

~160

Estimated current unmet need: Victim-survivor households in temporary accommodation (March 2026)

Already relatively high levels of provision. In line with the Council of Europe benchmark.

Vacancies alongside unmet need. Barriers to entering refuge include reluctance to enter shared or restrictive accommodation, location preferences, and difficulty engaging people and converting referrals into placements, particularly women with multiple compound needs.

Larger families are a particular gap. 10 referrals were declined due to family size in 25/26. 96% of places are single-bedroom, 7% explicitly three or more, while 15% of DA households making homelessness applications have three or more children.

Physical accessibility is broadly sufficient. Only one referral was declined due to disability; half of buildings have an accessible ground-floor entrance.

An increasingly inclusive offer. The provider is adapting to support male survivors, LGBTQ+ and trans people, people from minoritised ethnic backgrounds and those with no recourse to public funds. Monitoring should continue of how well these groups' needs are met .

The MCN service is new. It has operated for three quarters, so its data does not yet reflect a stable position.

Initial episodes of support: sources of annual demand

271 episodes a year estimated to be required for domestic abuse related supported housing or housing-related support

Combining **demand already met (admissions)** with **referrals that did not result in a placement** as an estimate of annual unmet need.

Source	Annual episodes
Mainstream safe accommodation admissions, 2025/26	79
MCN refuge admissions, 2025/26 (scaled up from two quarters)	18
Referrals to mainstream not admitted, 2025/26	138
Referrals to MCN not admitted (scaled up from three quarters)	36
Total	**271**

Met demand is based on admissions; unmet demand on referrals not admitted. MCN data covers less than a full year, so it has been scaled up to an annual figure.

Which non-admitted referrals are counted?

Included (138 mainstream, 27 MCN): changed mind, could not be contacted or did not consent; proximity to perpetrator; family size, disability or other needs not met; no space; unsuitable accommodation; unaffordability.

Excluded: inappropriate or out-of-area referrals, people ineligible for support, no recourse to public funds, and needs better met elsewhere. Mainstream referrals declined for alcohol, drug or mental health needs are likely captured in MCN demand.

Not all included referrals represent confirmed accommodation need.

Proposed ideal setting mix: initial episodes

We have estimated where **people requiring support for the first time that year** each year would ideally be placed

A more diverse and flexible range of safe accommodation is proposed for referrals not currently admitted

Setting	Admitted (mainstream)	Admitted (MCN)	Not admitted (mainstream)	Not admitted (MCN)
Mainstream refuge – shared	70%	0%	20%	0%
Dispersed safe accommodation	30%	0%	41%	0%
MCN refuge	0%	100%	0%	33%
Emergency / assessment	0%	0%	39%	14%
Second-stage / move-on	0%	0%	0%	0%
Housing First	0%	0%	0%	15%
Wider MCN supported accommodation	0%	0%	0%	38%
Total	**100%**	**100%**	**100%**	**100%**

Mainstream: more dispersed and emergency options

More dispersed, self-contained accommodation for households whose needs or family size make shared refuge unsuitable. Short-term emergency/assessment provision would offer immediate safety and time to consider options without committing to refuge – relevant given how many referrals did not proceed.

MCN: diversify beyond specialist refuge

A gap in wider, gender-specific supported accommodation for complex and enduring needs, including women vulnerable to exploitation who may not qualify for refuge. Emergency/assessment and Housing First offer more flexible routes, though most will need substantial staffing.

Admissions follow actual placements; referrals not admitted are allocated by recorded reason. Proportions are illustrative, not established demand. Setting types modelled follow the Whole Housing Approach, from refuge to second-stage, emergency/assessment and specialist provision.

Onward episodes: moves between settings

Around **47 further episodes a year** estimated to be needed **- as people move through the pathway onto other types of accommodation within the same year**

14 people left mainstream refuge after 6+ months	**14 second-stage / move-on**	All assumed to benefit from earlier access to second-stage accommodation, freeing refuge places sooner.
53 emergency/assessment episodes from mainstream referrals	**27: shared refuge 8, dispersed 19**	Half estimated to go on to safe accommodation, mostly dispersed; half need no further placement.
11 MCN refuge exits a year	**3: wider MCN SA 2, Housing First 1**	30% need further supported accommodation; many will need high levels of staffing.
5 emergency/assessment episodes from MCN referrals	**3: MCN refuge 2, Housing First 1**	Half go on to supported accommodation; Housing First for those not wanting refuge.

Indicative assumptions. Figures rounded.

Combined annual demand for safe accommodation

An estimated 318 episodes of support are needed each year currently, projected to rise to 354 by 2037

271
Initial episodes a year needed: 97 admissions and 174 referrals not admitted

+47
Onward episodes as people move between settings
These are further moves, not extra people

318
Total episodes a year | 2026
+19 by 2032 (337); +37 by 2037 (354)

Setting	2026	2032	2037
Mainstream refuge – shared	91	96	101
Dispersed safe accommodation	99	105	111
MCN refuge	31	33	35
Emergency / assessment	59	62	65
Second-stage / move-on	14	15	16
Housing First	7	8	8
Wider gender-specific MCN supported accommodation	16	17	18
Total episodes	**318**	**337**	**354**

Projected using 25+ population growth of about 1% a year. Figures are rounded independently, so may not sum exactly.

Gap analysis: domestic abuse

Additional need is concentrated in more flexible settings rather than conventional shared refuge

Type of accommodation / support	Length of stay	2026 current	2032 required	2032 gap	2037 required	2037 gap
Mainstream refuge – shared	6 months	35	48	+13	51	+16
Dispersed safe accommodation	6 months	16	53	+37	55	+39
MCN refuge	12 months	12	33	+21	35	+23
Emergency / assessment	3 months	0	16	+16	16	+16
Second-stage / move-on	12 months	0	15	+15	16	+16
Subtotal: DA safe accommodation	**–**	**63**	**165**	**+102**	**173**	**+110**
Housing First	10 years	0	79	+79	83	+83
Wider gender-specific MCN supported accommodation	2 years	0	34	+34	36	+36
Subtotal: wider supported accommodation	**–**	**0**	**113**	**+113**	**119**	**+119**

Ideal capacity at each point in time, not a phased development plan.
***Lengths of stay** are ideal planning assumptions; actual stays often exceed these (14 mainstream residents left in 2025/26 after 6+ months).*
For the purposes of our modelling, we have categorised the 16 self-contained units of mainstream safe accommodation that are not within a wider shared building as dispersed safe accommodation.

Strategic implications and priorities: domestic abuse

Where should East Sussex concentrate effort and development?

Key finding: targeted diversification of the existing pathway, rather than significant expansion of conventional refuge.

1 Improve access to existing provision	Stronger referral pathways, earlier engagement and more flexible options to turn more referrals into placements.
2 Develop emergency and assessment provision	Short-term specialist accommodation offering immediate safety and time to assess needs before a longer-term placement.
3 Strengthen move-on from mainstream refuge	Second-stage accommodation with continued support, alongside better access to settled housing and tenancy support.
4 A more flexible pathway for women with multiple compound needs	Alternative specialist placements and longer-term female-only supported accommodation, developed with other services.
5 Address gaps in accessibility and suitability	Prioritise self-contained or dispersed options, including for larger families, and keep monitoring access for different groups.

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Adult transitional groups: single homeless, substance misuse, and prison leavers

How we have estimated future need: adult transitional groups

From unmet need and new approaches to required supported housing capacity

1

Map current provision

Use Housing Benefit claims, provider information and commissioner intelligence to identify existing accommodation and support.

2

Estimate current unmet need

Use H-CLIC, temporary accommodation, rough-sleeping, probation and treatment data to identify people not appropriately housed.

3

Project newly arising demand

Estimate annual new demand from 2025/26 flows, then apply the JSNA population growth assumption.

4

Convert demand to capacity

Apply an indicative mix of support types and lengths of stay; compare total required capacity with current supply.

Population growth assumption

~11.5%

Projected growth in the adult (25+) population, 2026–2037

2026 annual new demand: **812**
2037 annual new demand: **904**

Adult model excludes young people and domestic abuse.

Single homelessness

Expand capacity across the pathway, with a particular focus on complex needs

192
Estimated current unmet need

445
Annual new demand, 2026
25% of statutory homeless applications + rough sleepers

496
Annual new demand, 2037

Insufficient provision. Housing teams reported people remaining in temporary or emergency accommodation because suitable supported housing is unavailable.

A pronounced gap for complex/high-risk needs. Some people cannot be safely supported in ordinary provision but do not meet Adult Social Care eligibility thresholds. On average, providers reported declining 16% of all referrals received because the needs were too high. Providers see a mismatch between the levels of support they can provide and the range of needs amongst their residents: on average, 12% of residents were reported to have a higher level of need than the typical level of support provided.

Continued need for flexible and inclusive provision. Needs can change over time and support in any setting needs to be able to flex to accommodate that.

Move-on is a major constraint, but longer-term support is also needed for some. A longer-term Housing First offer, High Stability Housing and continuing low-level support can provide alternatives where rapid move-on is inappropriate (providers reported on average 7% of residents could step down to a lower-level support offer if available).

Substance misuse

Create accommodation options for different levels of need and stages of recovery

128
Estimated current unmet need

198
Annual new demand, 2026
75% of statutory homeless applications + rough sleepers

221
Annual new demand, 2037

Limited specialist housing. Most people are supported through generic homelessness provision.

Active substance use is an access gap. People can be excluded from conventional supported housing or repeatedly lose temporary accommodation because of ongoing use.

High-support, multiple-compound-needs provision. Commissioners are exploring enhanced or overnight-staffed accommodation, potentially through cross-area commissioning.

Developing a more graduated recovery pathway. Different stages of recovery need appropriate environments; as well as provision for the most complex group, there is a need for clearer recovery and move-on options for people whose needs reduce over time.

Provider returns: mean 53% of residents had substance-use needs across responding services (range 0–100%).

Prison leavers

Work with probation to build routes beyond short-term justice accommodation

141
Estimated current unmet need

169
Annual new demand, 2026
60% of statutory homeless applications + rough sleepers

187
Annual new demand, 2037

A gap at and beyond immediate release. Dedicated resettlement housing is limited; CAS3 ordinarily offers up to 84 days and does not provide a complete move-on pathway. Even on release provision is limited – 13% of prison leavers recorded as accommodated in CAS2/3 on first night of release vs 20% recorded as homeless.

Lower-intensity options are important. Some people need practical support with budgeting, daily routines and sustaining a tenancy rather than intensive supported housing. Shared housing or HMOs with low-level support could provide an intermediate step between short-term justice accommodation and fully independent housing.

Higher-risk groups need different arrangements. People leaving longer sentences or presenting particular risks may need more structured, longer-term accommodation; risk and support need are not identical.

Move-on is especially difficult. Affordable settled housing is scarce and landlords may be reluctant to accommodate people with offending histories.

Better coordination around release is needed alongside additional accommodation, including early identification of housing needs and arrangements for people released without accommodation in place.

Provider returns: mean 18% of residents were prison leavers across responding services (range 0–55%).

Proposed ideal setting mix: adult transitional groups

Current provision compared with the proposed mix for unmet and newly arising need, by group

Setting	Current provision	Homeless 25+	Substance misuse	Prison leavers
Low – floating	18%	21%	13%	12%
Low – accommodation-based	25%	23%	12%	8%
Medium – floating	18%	9%	6%	0%
Medium – accommodation-based	22%	25%	28%	11%
Specialist recovery housing	3%	0%	25%	0%
Prison-leaver resettlement	11%	0%	0%	60%
High – accommodation-based / complex needs	2%	10%	9%	5%
Housing First	0%	7%	4%	2%
High Stability Housing	0%	5%	3%	2%
Total	**100%**	**100%**	**100%**	**100%**

Key shifts modelled

- **More high-support options:** complex-needs accommodation rises from 2% of current provision to 5–10% of new need. Housing First (2–7%) and High Stability Housing (2–5%) are added, although neither exists in this form now.
- **A strong core of low and medium support:** accommodation-based support stays the largest share for homeless adults aged 25+ (48%).
- **Dedicated cohort provision:** recovery housing takes 25% of substance misuse need, compared with 3% of current provision. Resettlement provision takes 60% of prison leaver need, compared with 11%.

Note: The 87 local, time-limited "Housing First" cases are counted within medium floating support, rather than the open-ended Housing First row.

Combined gap analysis: adult transitional groups

Substantial additional capacity is modelled across most provision types (adults aged 25+)

Type of accommodation / support	Length of stay	2026 current	2032 required	2032 gap	2037 required	2037 gap
Low – floating support	6 months	85	81	-4	78	-7
Low – accommodation-based	2 years	120	263	+143	312	+192
Medium – floating support	2 years	87	111	+24	116	+29
Medium – accommodation-based	2 years	108	337	+229	413	+305
Specialist recovery housing	1 year	16	43	+27	56	+40
Prison-leaver resettlement	1 year	54	93	+39	113	+59
High – accommodation-based / complex needs	2 years	12	121	+109	158	+146
Housing First (open-ended model)	10 years	0	317	+317	474	+474
High Stability Housing	10 years	0	237	+237	352	+352
Total	**–**	**482**	**1,603**	**+1,121**	**2,072**	**+1,590**

Assumes 10% of those currently in supported accommodation could ideally be moved on – based on provider data shared on those past length of stay, plus under-25s.

Strategic implications and priorities: adult transitional groups

Where should East Sussex concentrate effort and development?

Key challenge: modelling and qualitative data suggest more of everything is needed.

1 Prioritise complex-needs provision	Consider smaller, flexible high-support options across the county, including women-specific settings, provision accepting active substance use and accessible accommodation.
2 Grow conventional supported housing	Increase low- and medium-support accommodation alongside specialist provision; allow services to respond when needs or risks escalate. Consider options for wrap-around MDT support – in line with considerations for the Care Act eligible groups.
3 Agree prison-leaver options with probation	Work with probation to explore practical resettlement housing and more structured longer-term routes beyond CAS, with appropriate risk management.
4 Develop housing-led / longer-term alternatives	Consider a longer-term Housing First, High Stability Housing and continuing low-level support for people unlikely to sustain fully unsupported living.
5 Strengthen move-on and tenancy sustainment	Work with housing authorities and registered providers on access to settled housing, reciprocal pathways and floating support after moves.

PPL