

# Strategic Evidence Base for Bath & North East Somerset: Executive Summary

June 2026



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## Foreword

The Strategic Evidence Base is a summary of information and evidence about Bath and North East Somerset to help inform local decision making:

[Strategic Evidence Base Full Report](#)

This document provides a summary of the key messages from the Strategic Evidence Base.

## Our population continues to grow and further growth is expected

- In 2024 the population of B&NES is estimated to be **200,028**, an 11% increase since 2014.
- The shape of the population is largely driven by the **high number of university students** attending the two campus-based universities in the area.
- The B&NES population is projected to increase to **over 212k by 2032**, an 8.4% increase from 2022.
- By 2032, **20% of the population is projected to be over 65**, whilst the proportion aged under 18 will decrease.
- The largest driver of growth is projected to be from **international migration**, with an increase of over 15,000 from 2022 to 2032.
- Fewer births than deaths mean that **natural change** over time is set to see a decrease in B&NES over the next decade.
- Over the same period, B&NES is set to see a larger proportion of its population become dependent, putting strain on social care and the economy.

## B&NES Population Pyramid, 2024

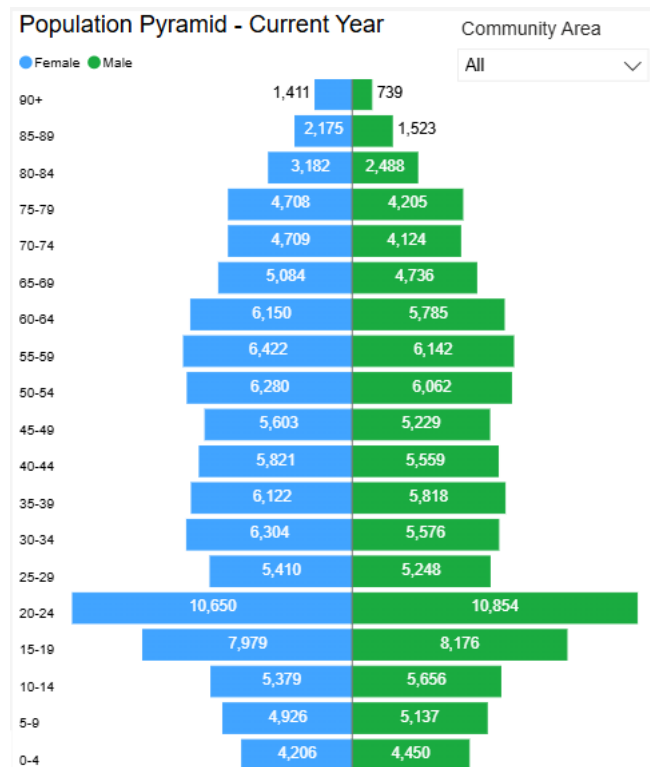


Figure 1 B&NES Population Pyramid – 2024. Source: [Office for National Statistics](#). Mid year population estimates are calculated for June of the effective year and released with a 12 month delay.

## Our overall outcomes are good

- **Life expectancy is higher** than the national average: 85.7 years (Female), 82 years (Male).
- 81% of residents are **satisfied with B&NES as a place to live** (2023), compared to 75% nationally.
- **Unemployment levels in B&NES are low** (2.6% compared to 3.6% England, Q4 2022).
- 52% of the population are educated to **degree level** or higher compared to 43% for England.
- Pupils in B&NES **attained higher grades** compared to regional and national figures in all stages of education except Key Stage 2 (KS2), where attainment increased and was the same as national (2024/25).
- 2021 data shows that most **mortality rates in B&NES** (including premature and preventable) are statistically significantly lower than the rate for England.

## Despite overall low levels, we see pockets of relative deprivation

- B&NES remains among the least deprived local authorities nationally, ranked 245 out of 296 local authorities in England in 2025.
  - However, **three** small areas are within the most deprived 10% nationally, an increase from two areas in 2019:

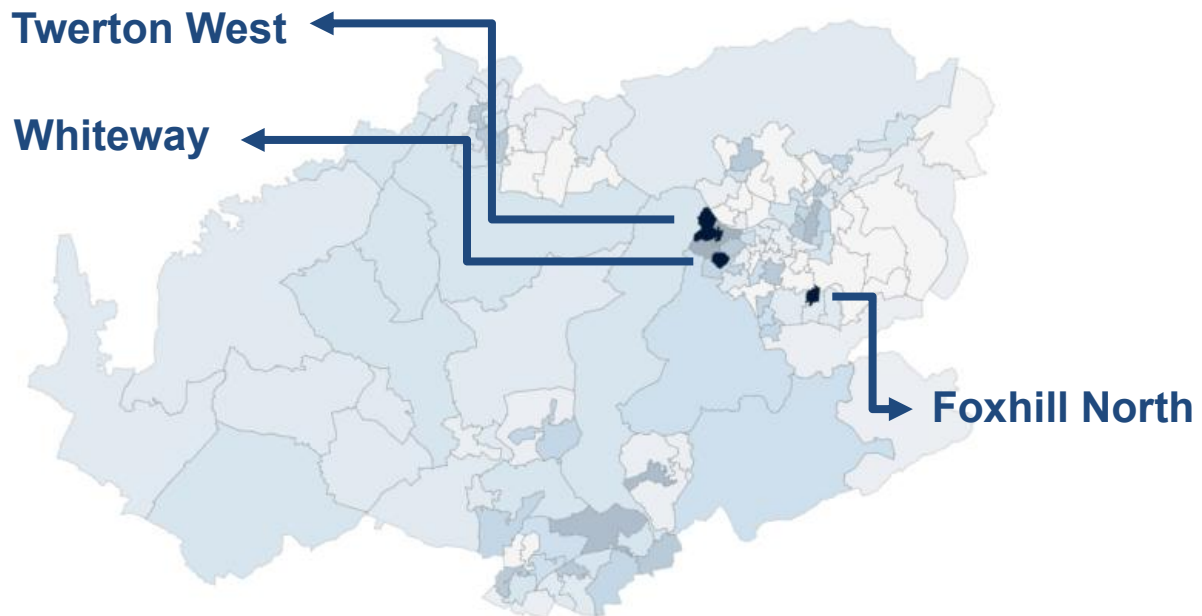


Figure 2 Indices of Deprivation 2025. Source: [Indices of Deprivation dashboard](#)

### Inequalities affect a wide range of local life outcomes

- Geographical inequalities in life expectancy in B&NES mean the difference between MSOAs with the highest and lowest life expectancy is **8.6 years for females** and **9.3 years** for males.
- Gaps in education attainment are present for the **Free School Meal (FSM)** cohort and is consistently larger across all key stages in B&NES than the gap seen nationally and has been for a number of years.
  - Attainment in the FSM cohort remains ranked in the bottom quartile when compared to all LAs in England at both Early Years Foundation Stage (EYFS) and KS2.
- **Smoking** is the greatest risk factor for mortality in B&NES (2019), and is the leading preventable cause of illness and premature death in England.
- **1 in 5** (21%) workers in routine & manual occupations smoke in B&NES (2020), compared to 1 in 10 (10%) of adults in B&NES who smoke (2021).
- **Mortality rates** are substantially higher than the England rate in some of the most deprived areas in B&NES (including premature deaths; cancer mortality, cardiovascular disease mortality & avoidable deaths).

## Demand for services remains high

- In 2025, the number of **Education, Health and Care plan's (EHCPs)** was 2,469. The number of active EHCPs has been **increasing over time** for B&NES, B&NES' children's services nearest neighbours (CSNN) and England. However, for B&NES, **the rate of increase has been slowing since 2023**, dropping from an increase of 15% in 2023 to 11% in 2025.
- There were **5,992** households on the waiting list for **social housing** (March 2023), a 9% increase compared to the previous year.

## Cost of living challenges continue

- Estimates suggest **4,000** people in B&NES (including **1,500** children) will fall into absolute poverty in 2022/23.
- 13% of households in B&NES are estimated to be in **Fuel Poverty**.
- Increases in residents sometimes/often worried that food would run out (from 13% in 2022 to 18% in 2023).

## Economic growth and productivity have been relatively low

- Growth in the **number of businesses** has not kept pace with England and West of England (21% vs 34%/31% respectively from 2010 to 2022).
- **Economic growth** in B&NES has not kept pace with England and West of England (11% vs 50%/55% respectively from 1998 to 2021).

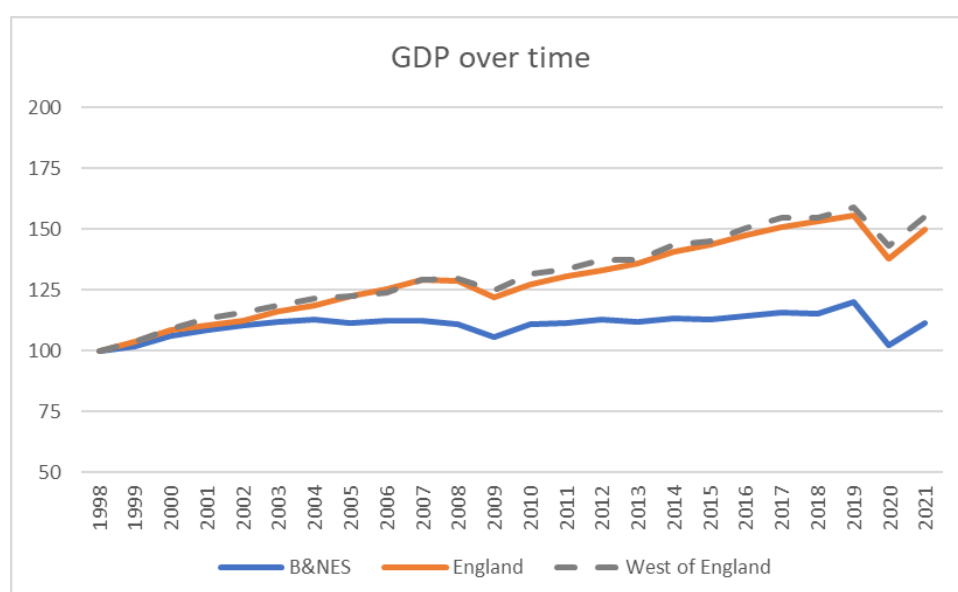


Figure 3 GDP over time (CVM Index, 1998=100). Sources: ONS Regional GDP (April 2023): [LAs](#) / [ITL regions](#) / [Enterprise regions](#)

- **Productivity** is lower than England and the West of England with the gap widening over the past decade and growth stagnating in B&NES in recent years.
- Following an upwards trend since 2010, the **employment rate** in B&NES has recently fallen and is now below the national rate for the first time in over a decade (Q4 2022).
- Although resident **wages** are now higher than national, workplace wages are still lower suggesting those working for employers based outside B&NES receive higher wages on average.

## Housing pressures are worsening

- The **cost of housing is high** (x10 house price to wage ratio compared to x8 nationally, 2024).
- The average monthly **private rent** is considerably **higher** in B&NES. In March 2025 the average price was £1,734 compared to £1,386 in England. Rents in B&NES **increased more rapidly** compared to England and the South West in 2024/25.
- There has been a decrease in the number of households who own their house with a **mortgage** and an increase in the number who **rent** from the private sector (Census 2021).
- We have a relatively high number of **vacant dwellings** (2,344 in 2024), of which more than **1 in 3** (36%) are **long-term** vacant dwellings.
- We have seen an increasing trend in the number of households in **temporary accommodation** since 2019/20, although this remains **below** the national rate.
- **Initial homelessness assessments** remain **below** national and South West levels, but the **gap has narrowed** following two years of notable increases. For the first time in five years, B&NES has seen **higher** rates of households at **risk of homelessness** than national and regional averages.

## Our emissions are reducing

- Greenhouse gas emissions **decreased** by 39% (from 2005 to 2021).
- Emissions from a broad range of economic sectors have reduced: Domestic (**39% decrease**), Transport (**22% decrease**), Commercial, Industry, and the Public Sector but they **are not decreasing fast enough to reach net zero by 2030**.

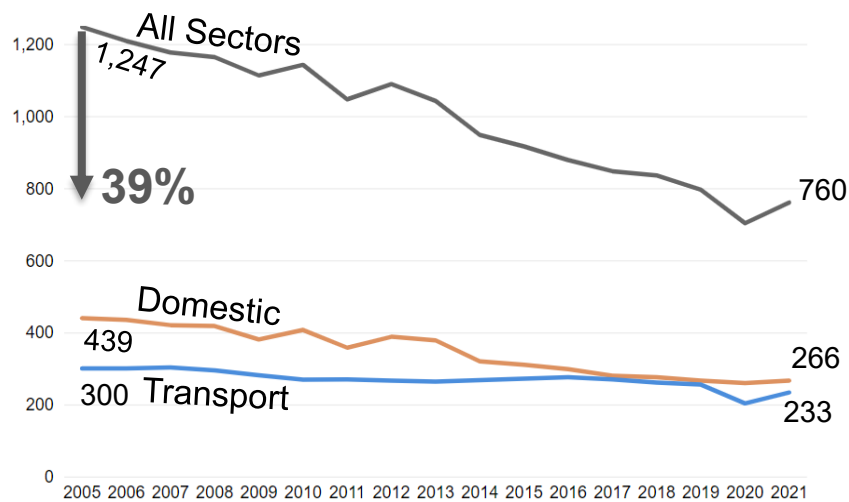


Figure 4 B&NES District Greenhouse Gas Emissions (kt CO<sub>2</sub>e). Source: [UK local authority and regional greenhouse gas emissions national statistics](#)

## We have signs of worsening wellbeing and higher prevalence of mental ill-health

- We have higher anxiety levels than England.

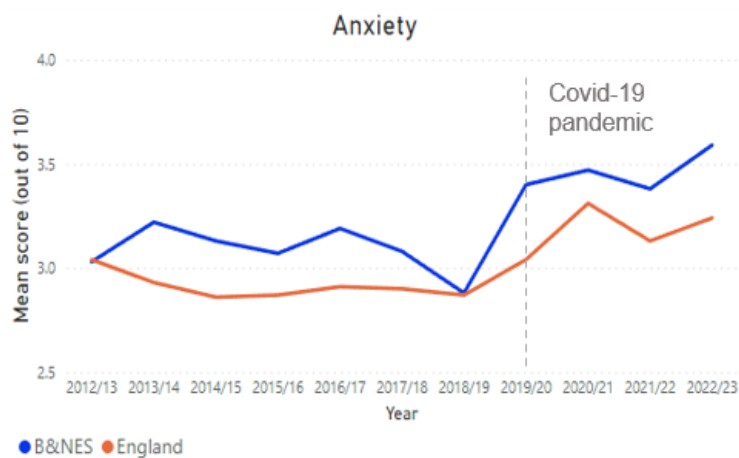


Figure 5 Anxiety levels. Source: [ONS Personal Wellbeing in the UK](#)

- Rates of **hospitalisation** (2020/21) are increasing and comparatively high for:
  - Under 18 mental health
  - Under 18 alcohol conditions
  - Eating disorders
  - Self-harm

particularly for **young women and girls**.