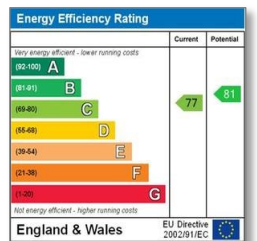




Bath & North East Somerset Local Housing Need Assessment

Supplementary Report:
Proposed Housing Requirement
September 2026



**Opinion Research Services**

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Proposed Housing Requirement

1. Bath & North East Somerset (B&NES) Council commissioned Opinion Research Services (ORS) to prepare a local housing need assessment (LHNA) to inform the strategic policies of the Local Plan, as required by the National Planning Policy Framework (NPPF). The LHNA was prepared on the basis that 27,018 dwellings would be planned for over the 18-year Local Plan period 2025-2043. This reflected the annual local housing need of 1,501 dwellings per annum (dpa) identified using the standard method set out in national planning guidance at the time the assessment was undertaken.
2. The inputs to the standard method have since been updated, and the local housing need has increased to 1,518 dpa. However, Planning Practice Guidance (PPG) makes clear that local housing need is an unconstrained assessment of the minimum number of homes needed and is the first step in deciding how many homes should be planned for. It does not produce the housing requirement for the Local Plan, which is determined separately having regard to relevant constraints and other plan-making considerations.
3. Having considered all relevant factors, the emerging Local Plan proposes a stepped housing requirement of 22,000 dwellings over the 18-year plan period from 2025 to 2043. This comprises a housing requirement of 760 dwellings per annum (dpa) for the first seven years of the plan period (2025-2032), followed by 1,518 dpa for the remaining eleven years (2032-2043), reflecting the current local housing need.
4. ORS has therefore updated key outputs of the LHNA to reflect the proposed stepped housing requirement, with the population and household projections based on the number of homes planned for each year of the plan period. The proposed housing requirement would provide for natural growth (based on new household formations offset against dissolutions) and enable recent migration trends to continue. The planned increase to housing delivery above historic trends would also enable some potential households (i.e. people living in the local area as part of another household who want to live independently) to form separate households, alongside an increase in the number of people moving to the area above recent migration trends.
5. The LHNA considered two scenarios for future population growth on the basis that around 17,200 potential households were likely to be resident in the local area at the base date of the Local Plan in 2025:
 - » **Scenario A** assumed that past household formation trends would continue, with the identified potential households continuing to live within existing households
 - » **Scenario B** assumed increased household formation, with all of the identified potential households forming separate households, albeit that many would need Affordable Housing.
6. The LHNA concluded that Scenario B represented the more credible demographic projection, albeit still significantly above historic trends. It also aligned with the Government's objective of addressing the effects of past housing undersupply by enabling local residents to form separate households and live independently. The LHNA therefore assessed the size, type and tenure of housing needed on the basis of Scenario B, while recognising that achieving this outcome would need more Affordable Housing to be provided, as many potential households had not formed as they were unable to afford suitable housing in the local area.
7. On this basis, the LHNA identified a need for 14,400 homes for market sale or rent (54% of total dwellings) and 12,300 affordable homes (46%). However, viability evidence identified that a 40% Affordable Housing target represented the upper end of what was likely to be economically viable on qualifying major development sites, with lower targets of 30% in the Somer Valley and 20% for flatted development.

Growth of the Local Community

8. The proposed housing requirement of 22,000 dwellings is lower than the local housing need that formed the basis of the original LHNA (27,018 dwellings). Having regard to the viability evidence, it is therefore unlikely that the proposed level of housing provision could deliver sufficient Affordable Housing to enable all 17,200 potential households to form separate households over the plan period. It is therefore necessary to consider the housing mix that could reasonably be delivered within the proposed housing requirement.
9. The demographic projections have therefore been updated on the basis that half of the identified potential households (approximately 8,600 households) would form separate households. This does not reduce the number of potential households that want to form, or the associated Affordable Housing need. However, it provides an appropriate basis for establishing the size, type and tenure of housing for the Local Plan.
10. Figure 1 compares the projected resident population over the period 2025-2043 for the original LHNA scenarios, the 2018-based and 2022-based sub-national population projections (which assume that migration trends over the 10-year periods up to the respective base dates will continue) and the updated projection based on the proposed housing requirement. The updated projection identifies a faster rate of population growth than the two sub-national projections but lower growth than either of the original LHNA scenarios, with a resident population of 241,300 in 2043 representing an 18-year growth of 41,000 persons.

Figure 1: Population estimates and projections 2011 to 2043 (Source: Mid-year population estimates, ONS; Sub-national population projections for England 2018-based and 2022-based, ONS; ORS Model)



11. Figure 2 provides a summary of key outputs based on the projected growth, with baseline estimates set out alongside the Scenario A and Scenario B outputs for 2043 and the change from 2025-2043.

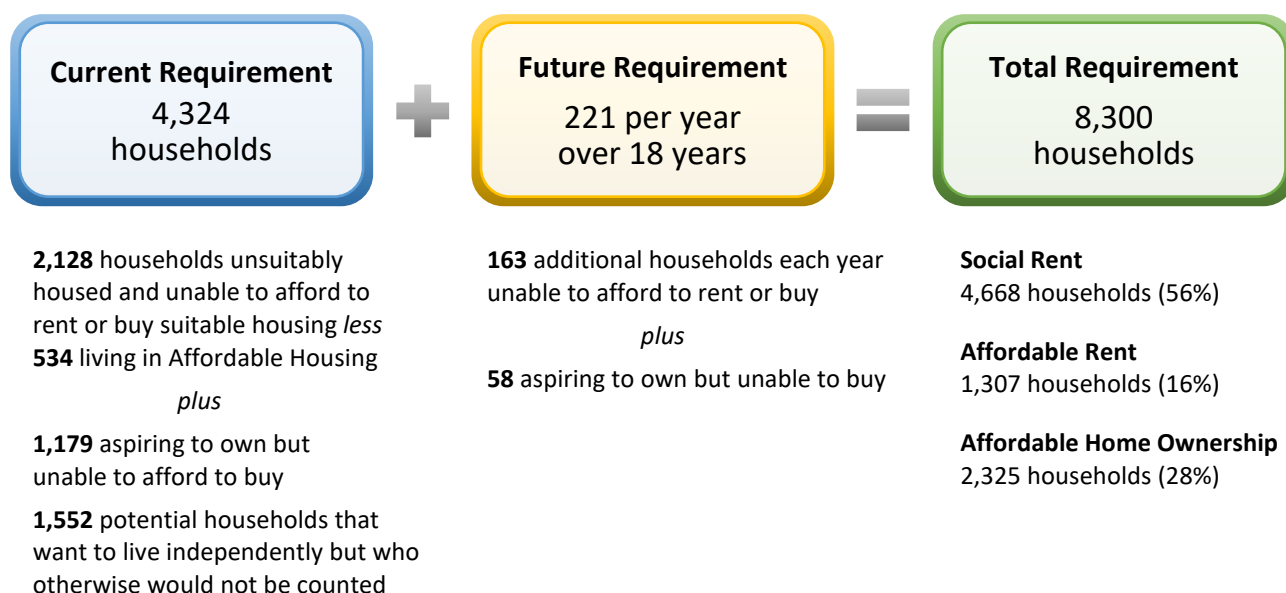
Figure 2: Population growth by resident type and average household size, 2025-2043 (Source: ORS Model)

	Baseline 2025	Planned 2043	Change 2025-2043	LHNA Scenario A	Change 2025-2043	LHNA Scenario B	Change 2025-2043
Household residents	192,322	232,753	+40,431	256,494	+64,173	236,895	+44,574
Average household size (persons)	2.307	2.241	-0.066	2.360	+0.053	2.180	-0.125
Communal establishment residents	8,077	8,595	+518	8,600	+523	8,585	+508
TOTAL POPULATION	200,399	241,348	40,950	265,094	+64,696	245,480	+45,082

Affordable Housing

12. The NPPF states that the needs of groups with specific housing requirements should be assessed and that those groups who require Affordable Housing should be identified. Planning Practice Guidance confirms that *“all households whose needs are not met by the market can be considered in affordable housing need”* and that *“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”*.
13. Household affordability is therefore a key consideration in determining both the Affordable Housing need and the type and tenure of homes likely to be required by households that are unable to afford. Figure 3 summarises the updated analysis on the basis that half of the identified potential households (approximately 8,600) would form separate households, and identifies that 8,300 households will require Affordable Housing to be provided over the 18-year Local Plan period 2025-2043, an average of around 644 per year.

Figure 3: Affordable Housing requirement for Bath & North East Somerset 2025-2043 (Source: ORS Model. Note: Figures may not sum due to rounding)



14. For the base date of the Plan, the updated analysis identifies around 2,100 existing households that are unsuitably housed and unable to afford to rent or buy suitable housing. Some of these households occupy Affordable Housing and taking account of the properties they would vacate reduces the net requirement. In addition to those unable to afford, there are around 1,200 households currently renting their homes who aspire to own but cannot afford to buy; and of the potential households identified that want to live independently that have not previously been counted, around 1,600 have been counted within the requirement given that they have been unable to form as they cannot afford to rent or buy suitable housing. As previously acknowledged, this would not provide homes for all of the potential households that want to form who cannot afford suitable housing, or the associated Affordable Housing need, but it provides an appropriate basis for establishing the size, type and tenure of housing for the Local Plan.
15. Over the 18-year Plan period, there will be additional requirement from new and existing households unable to afford to rent or buy suitable housing and new households that aspire to own but cannot afford to buy. Together, these yield an average annual net future requirement of around 222 households per year, which equates to a total net future requirement from around 4,000 households over the 18-year period 2025-2043.

16. The current requirement from 4,300 household and the future requirement from a further 4,000 households result in the total requirement from 8,300 households over the 18-year Local Plan period, 462 households per year on average. This includes all households unable to afford to rent or buy suitable housing, and all households who want to own but cannot afford to buy where Affordable Home Ownership would provide a suitable housing option.
17. It is important to recognise that the overall number of dwellings provided will inevitably be higher than the 8,300 households identified, as there will always be a proportion of unoccupied dwellings due to transactional vacancies. **The updated analysis has identified a requirement for around 8,800 dwellings to be delivered as Affordable Housing over the 18-year Local Plan period 2025-2043, equivalent to 40% of the proposed housing requirement.**
18. The total requirement identified by the LHNA analysis is a net figure and therefore any future losses from the current stock (such as demolition, or sales through Right to Buy) would increase the number of affordable homes required by an equivalent amount. The analysis also assumes that the number of households in receipt of Housing Benefit to enable them to afford Market Rent will not change.
19. Figure 4 provides a breakdown of the identified Affordable Housing requirement based on the number of bedrooms needed and the type of housing that households would be able to afford, calculated using the affordability framework set out at Figure 30 of the original LHNA report.

Figure 4: Overall Affordable Housing Requirement by type of Affordable Housing and number of bedrooms 2025-2043
(Source: ORS Model. Note: Figures may not sum due to rounding)

Number of Dwellings	Social Rent	Affordable Rent	Affordable Home Ownership	Total
BATH CITY				
1 bedroom	915	64	526	1,505
2 bedrooms	427	131	482	1,040
3 bedrooms	350	152	238	740
4 bedrooms	148	58	81	287
5+ bedrooms	77	30	42	148
BATH CITY TOTAL	1,918	434	1,369	3,721
NORTH EAST SOMERSET				
1 bedroom	1,012	89	241	1,343
2 bedrooms	813	255	379	1,446
3 bedrooms	779	401	332	1,512
4 bedrooms	336	163	115	614
5+ bedrooms	95	46	33	174
ALL DWELLINGS	3,036	953	1,099	5,089
BATH & NORTH EAST SOMERSET				
1 bedroom	1,928	153	767	2,848
2 bedrooms	1,240	385	861	2,486
3 bedrooms	1,130	552	570	2,252
4 bedrooms	484	220	196	901
5+ bedrooms	172	76	75	323
OVERALL TOTAL	4,954	1,387	2,468	8,809

20. The updated analysis identifies an overall requirement for around 6,400 dwellings to be provided as rented Affordable Housing, comprising 1,400 dwellings (22%) for households that could afford Affordable Rent (without Housing Benefit and spending no more than 35% of their income on rent) and 5,000 dwellings (78%) provided as Social Rent for households that could not afford Affordable Rent.
21. As noted in the original LHNA, this does not necessarily mean that 22% of housing should be provided as Affordable Rent with the remainder provided as Social Rent on each individual site. Instead, the Council should aim to achieve this balance overall across all of the rented Affordable Housing that is delivered. It will therefore be important for the Council to take account of all of the available evidence when determining the appropriate mix of housing to be provided on individual sites, in order to ensure that the overall balance is achieved.
22. The remaining 2,500 dwellings identified by the analysis would be for households that aspire to own but cannot afford to buy, where they have been assessed as having sufficient income and savings to afford Affordable Home Ownership. It should be noted that other households that aspire to own are unable to afford Affordable Home Ownership, so this would not provide a suitable housing option, but these households have not been counted as needing rented Affordable Housing as they can afford Market Rent.
23. When considering the size of Affordable Housing required, 32% of households would need 1 bedroom and a further 28% would need 2 bedrooms, which will include some that need specialist older person housing. Of the overall requirement, around 1,200 dwellings would be homes for larger families (900 with 4 bedrooms and over 300 with 5 or more bedrooms). Whilst this represents only 14% of the total requirement, it would require around 68 homes with 4 or more bedrooms to be provided every year over the 18-year Plan period.

Overall Housing Mix

24. Figure 5 sets out the housing mix for the whole of Bath & North East Somerset local planning authority area over the 18-year period 2025-2043. It provides a breakdown of Market Housing and Affordable Housing in terms of the number of bedrooms based on the proposed housing requirement, and the need for specialist older person housing need based on the type of housing identified by the LHNA.

Figure 5: Overall Market Housing and Affordable Housing mix by property type and number of bedrooms 2025-2043
(Source: ORS Model. Note: Figures may not sum due to rounding)

Number of Dwellings 2025-2043		Market Housing	Affordable Housing	TOTAL
General Needs Housing	1 bedroom	355	2,244	2,599
	2 bedrooms	2,649	2,184	4,834
	3 bedrooms	5,288	2,252	7,540
	4 bedrooms	2,775	901	3,676
	5+ bedrooms	914	323	1,237
Specialist Older Person Housing	Housing with Care	196	210	406
	Housing with Support	742	696	1,438
Dwellings in Use Class C3		12,919	8,809	21,729
Bedspaces in Use Class C2 (equivalised to dwellings)				289
OVERALL TOTAL				22,018

Housing Mix in Bath City

25. Figure 6 provides a breakdown of the overall housing mix identified for Bath City: a total of 6,228 dwellings over the 18-year period 2025-2043.
26. For Bath City, the analysis has assumed that past trends in population growth will be sustained in future, which includes a continued growth of the student population. The analysis has also assumed that household formation rates will increase, so that half of the potential households identified (i.e. people living in the local area but as part of another household, and who want to live independently) can form separate households.
27. Affordable Housing is based on the identified current and future requirement being met within the area, and the affordability analysis is based on house prices and rents in Bath City. On this basis, Affordable Housing represents over three fifths (61%) of all dwellings. If sufficient Affordable Housing cannot be delivered within Bath City, additional provision may be required in North East Somerset to help minimise any unmet need, subject to economic viability.

Figure 6: Overall Market Housing and Affordable Housing mix by property type, tenure and number of bedrooms, Bath City 2025-2043 (Source: ORS Model. Note: Figures may not sum due to rounding)

Number of Dwellings 2025-2043	Market Housing	Affordable Housing				OVERALL TOTAL
		Social Rent	Affordable Rent	AHO	Total	
General Needs Housing						
1 bedroom	-150	740	64	526	1,330	1,180
2 bedrooms	482	340	131	482	953	1,435
3 bedrooms	898	350	152	238	740	1,638
4 bedrooms	483	148	58	81	287	770
5+ bedrooms	353	77	30	42	148	502
Specialist Older Person Housing						
Housing with Care	64	44	-	-	44	108
Housing with Support	267	218	-	-	218	485
Dwellings in Use Class C3	2,397	1,918	434	1,369	3,721	6,118
Bedspaces in Use Class C2 (equivalised to dwellings)						110
OVERALL TOTAL						6,228
General Needs Housing						
1 bedroom	-2.4%	11.9%	1.0%	8.4%	21.4%	18.9%
2 bedrooms	7.7%	5.5%	2.1%	7.7%	15.3%	23.0%
3 bedrooms	14.4%	5.6%	2.4%	3.8%	11.9%	26.3%
4 bedrooms	7.8%	2.4%	0.9%	1.3%	4.6%	12.4%
5+ bedrooms	5.7%	1.2%	0.5%	0.7%	2.4%	8.1%
Specialist Older Person Housing						
Housing with Care	1.0%	0.7%	-	-	0.7%	1.7%
Housing with Support	4.3%	3.5%	-	-	3.5%	7.8%
ALL DWELLINGS	39.2%	31.4%	7.1%	22.4%	60.8%	100.0%
Affordable Housing	-	51.5%	11.7%	36.8%	100.0%	-

Housing Mix in North East Somerset

28. Figure 7 provides a breakdown of the overall housing mix identified for North East Somerset: a total of 15,772 dwellings over the 18-year period 2025-2043.
29. For North East Somerset, the analysis has assumed that future population growth will need to be higher than identified by past trends in order to ensure that the population and household growth across the whole of Bath & North East Somerset aligns with the number of dwellings identified by proposed housing requirement. Additional inward migrants are therefore assumed to move into the sub-area. The analysis also assumes that household formation rates will increase, so that half of the potential households identified are able to form separate households.
30. Affordable Housing is based on the identified current and future requirement being met within the area, and the affordability analysis is based on house prices and rents in North East Somerset. On this basis, the Affordable Housing represents around a third (33%) of all dwellings.

Figure 7: Overall Market Housing and Affordable Housing mix by property type, tenure and number of bedrooms, North East Somerset 2025-2043 (Source: ORS Model. Note: Figures may not sum due to rounding)

Number of Dwellings 2025-2043	Market Housing	Affordable Housing				OVERALL TOTAL
		Social Rent	Affordable Rent	AHO	Total	
General Needs Housing						
1 bedroom	505	583	89	241	914	1,419
2 bedrooms	2,167	598	255	379	1,232	3,399
3 bedrooms	4,390	779	401	332	1,512	5,902
4 bedrooms	2,292	336	163	115	614	2,906
5+ bedrooms	561	95	46	33	174	735
Specialist Older Person Housing						
Housing with Care	132	166	-	-	166	297
Housing with Support	475	478	-	-	478	953
Dwellings in Use Class C3	10,522	3,036	953	1,099	5,089	15,610
Bedspaces in Use Class C2 (equivalised to dwellings)						179
OVERALL TOTAL						15,789
General Needs Housing						
1 bedroom	3.2%	3.7%	0.6%	1.5%	5.9%	9.1%
2 bedrooms	13.9%	3.8%	1.6%	2.4%	7.9%	21.8%
3 bedrooms	28.1%	5.0%	2.6%	2.1%	9.7%	37.8%
4 bedrooms	14.7%	2.2%	1.0%	0.7%	3.9%	18.6%
5+ bedrooms	3.6%	0.6%	0.3%	0.2%	1.1%	4.7%
Specialist Older Person Housing						
Housing with Care	0.8%	1.1%	-	-	1.1%	1.9%
Housing with Support	3.0%	3.1%	-	-	3.1%	6.1%
ALL DWELLINGS	67.4%	19.4%	6.1%	7.0%	32.6%	100.0%
Affordable Housing	-	59.7%	18.7%	21.6%	100.0%	-