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Derbyshire Dales Employment Land Needs Assessment Update 2025

Final Report

ICENI PROJECTS LIMITED ON BEHALF OF DERBYSHIRE DALES DISTRICT COUNCIL

Iceni Projects Limited on behalf of
Derbyshire Dales District Council

March 2026

Derbyshire Dales Employment Land Needs Assessment Update 2025 FINAL REPORT

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1. Introduction

1.1 Derbyshire Dales District Council is currently preparing a Local Plan Review which will cover those parts of the District which fall outside of the Peak District National Park. Once adopted, it will replace the current 2017 Local Plan.

1.2 The Council published a new Local Development Scheme (LDS) in January 2025 setting out a timetable for the Local Plan Review. This sets out that the Council will consult on a draft Local Plan (Regulation 18) in Q1 2026, and then prepare a Pre-Submission version for consultation in Q3 2026, before the Plan's submission to the Secretary of State in Q4 2026. The LDS envisages that the Plan will be adopted in Q3 2027. The plan period is expected to run to 2045.

1.3 Iceni has previously prepared reports to consider the District's employment needs. The Derbyshire Dales Housing & Employment Land Needs Assessment Update 2023 modelled a number of scenarios for employment land needs, namely baseline; alternative; labour supply; completions trend scenarios; and net absorption. It ultimately recommended that the council plan for between 15 and 18 ha of employment land across the District as a whole based on net completions trends.

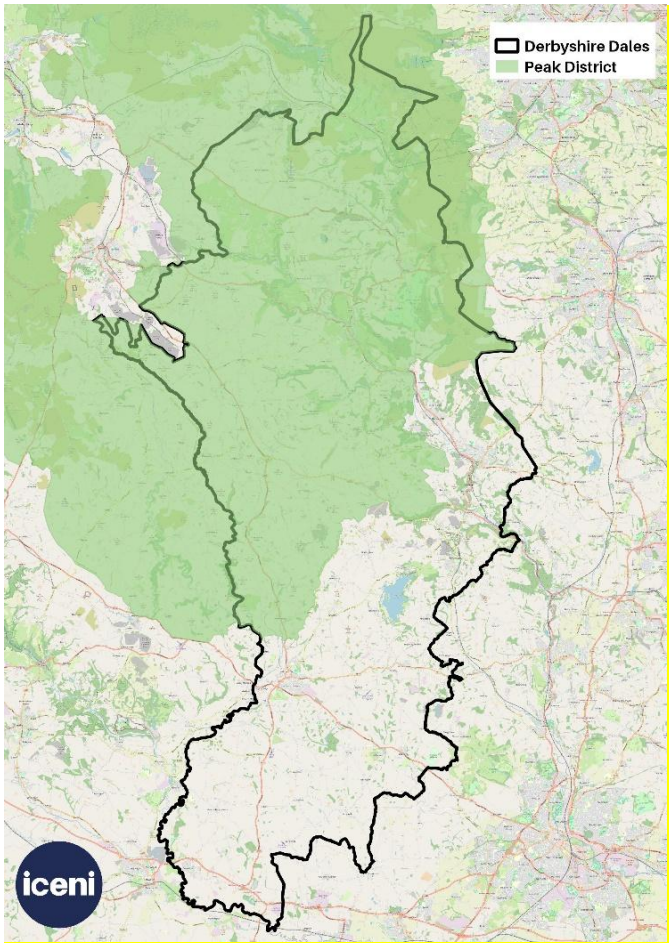
1.4 Since the preparation of the 2023 HELNA Update, Government has issued a revised NPPF (December 2024) and has revised the standard method alongside this which is used to determine overall housing needs. The overall housing need underpins the labour supply scenario in the modelling in the 2023 Study, and therefore it is appropriate to update the 2023 labour supply scenario accordingly to test the homes-jobs relationship.

1.5 The Council has commissioned Iceni Projects ('Iceni') to prepare updated evidence on employment land needs to inform the preparation of the Plan. This report therefore builds on and selectively updates the employment land needs analysis set out within the 2023 HELNA Update. This report was drafted in Summer 2025.

1.6 Whilst the primary objective is to provide an update of the labour supply scenario, the report will also provide a high-level update of economic and market dynamics, and updated completions and net absorption modelling to reflect the availability of two additional years' worth of data. The plan period has also changed, from 2017-40 in the 2023 HELNA, to a revised plan period from 2024-45. This report therefore updates the employment land needs evidence to cover this revised plan period.

1.7 The Council's Local Plan Review will only address the employment needs of those parts of the District which fall within the 'plan area' and are outside of the Peak District National Park. The District geography in this respect is shown in Figure 1.1 below.

Figure 1.1 Derbyshire Dales and Peak District National Park Boundaries



1.8 The Peak District National Park Authority (PDNPA) is the planning authority for the National Park and will prepare its own local plan separately.

1.9 As such, the employment land needs modelling is disaggregated from the district level to provide a needs figure for the plan area in isolation to inform preparation of the new Local Plan.

Report Structure

1.10 The remainder of the report is structured as follows:

- Section 2: Review of Economic and Market Dynamics;
- Section 3: Economic Vision and Growth Scenarios;
- Section 4: Employment Land Requirements;
- Section 5: Conclusions.

2. Review of Economic and Market Dynamics

2.1 This initial section of the report provides an updated assessment of economic and commercial property market dynamics.

Reviewing Recent Economic Data

2.2 Iceni has sought to review a range of economic indicators but would caution that the survey nature of some data – such as from the Annual Population Survey – mean that some data for the District needs to be treated with a degree of caution.

2.3 The table below shows the business count in Derbyshire Dales by sector for the years 2020, 2022 and 2024 (the latest available data). Overall the District's business base has shrunk by around 1% between 2022 and 2024.

2.4 The Agriculture sector saw the largest decline in business count with a decline of 35 enterprises over the two-year period 2022-2024. The agricultural sector also saw a decline between 2020 and 2022 of 40 enterprises. This is followed by a loss of 15 enterprises in Professional, scientific and technical services between 2022-24 which followed a loss of 30 between 2020-22. Retail also experienced a loss of 10 businesses between 2022-24.

2.5 However there was an increase of 20 businesses in Arts, entertainment and recreation over the 2022-24 period, following an increase of 10 businesses in the two years preceding.

Table 2.1 Business Count by Sector, Derbyshire Dales 2020-2022

	2020	2022	2024	2020-24 Change
Agriculture, forestry & fishing	940	900	865	-35
Production	295	300	300	0
Construction	480	505	505	0
Motor trades	115	120	125	5
Wholesale	145	150	145	-5
Retail	305	310	300	-10
Transport & Storage (inc postal)	155	150	145	-5
Accommodation & food services	410	415	420	5
Information & communication	215	185	170	-15
Finance & insurance	50	55	50	-5
Property	175	185	180	-5
Professional, scientific & technical	640	610	595	-15
Business admin & support	255	255	250	-5
Public admin & defence	50	55	55	0
Education	75	70	70	0
Health	145	130	135	5
Arts, entertainment, recreation & other services	230	240	260	20
Total	**4,680**	**4,635**	**4,570**	**-65**

Source: ONS Business Demography Data

2.6 The table below shows employment by sector 2019-2023 in Derbyshire Dales recorded by the ONS Business Register & Employment Survey (BRES). 2023 data is the most recently available BRES data and was not available when the 2023 study was undertaken.

2.7 Between 2022 and 2023, the BRES data shows a decline in employment of 1,025 jobs. The Accommodation and food service sector saw the largest decline in employment (-1000) but this may reflect data volatility at the District level as the

sector saw a similar scale increase the previous year.[1] The construction and wholesale and retail sectors also saw employment fall (-500 each). Declines across some sectors were counteracted by increases in employment in others, with manufacturing seeing the greatest increase, by 500 jobs. It should be noted that BRES data is survey-based and therefore the quality of the estimates deteriorates as geographies get smaller. For this reason, year on year changes should be treated with caution, and it is helpful to look at trends over longer time periods.

2.8 Over the 2019 to 2023 period the majority of sectors have remained broadly stable with regards to employment. The district's two largest sectors – accommodation and food service activities and manufacturing – both saw the same level of employment in 2023 as 2019, despite some annual fluctuations. The District's third largest sector, wholesale and retail trade, has also broadly seen stable levels of employment, with 5,000 jobs recorded each year between 2019-2022, falling to 4,500 in 2023.

[1] This is driven by pubs and bars and may be a reclassification issue

Table 2.2 Employment Trends by Sector, Derbyshire Dales (2019-2023)

	2019	2020	2021	2022	2023
Agriculture, forestry and fishing	2,500	3,000	2,500	2,500	2,500
Mining and quarrying	400	300	30	450	400
Manufacturing	5,000	4,500	5,000	4,500	5,000
Electricity, gas, steam and air conditioning supply	5	5	10	15	40
Water supply	400	175	175	100	125
Construction	1,500	1,750	1,750	2,000	1,500
Wholesale and retail trade; repair of motor vehicles and motorcycles	5,000	5,000	5,000	5,000	4,500
Transportation and storage	1,250	1,500	1,250	800	1,000
Accommodation and food service activities	5,000	4,500	5,000	6,000	5,000
Information and communication	500	800	700	600	500
Financial and insurance activities	150	175	200	200	125
Real estate activities	800	800	600	700	900
Professional, scientific and technical activities	2,250	2,000	2,000	2,000	2,250
Administrative and support service activities	1,500	800	1,000	1,250	1,000
Public administration and defence	3,000	3,000	3,000	3,000	3,000
Education	2,000	1,750	2,000	2,000	2,000
Human health and social work activities	2,500	2,500	2,500	3,000	3,000
Arts, entertainment and recreation	1,750	1,750	1,750	1,750	2,000
Other service activities	800	600	700	600	600
Total	**36,305**	**34,905**	**35,435**	**36,465**	**35,440**

Source: BRES 2023

Commercial Market Dynamics in 2023 HELNA

2.9 The commercial market assessment from the previous study is summarised in the section below. We then move on to consider the latest data/ evidence.

Office Market

2.10 The 2023 Derbyshire Dales Housing & Employment Land Needs Assessment Update pointed towards a notable rise in the level of vacant office space in Derbyshire Dales, with a vacancy rate of 14.9% in 2023. However, this was driven by the marketing of a single office complex (Chatsworth Hall office campus) following the move out of Derbyshire County Council. Excluding the vacant space at Chatsworth Hall resulted in a low vacancy rate of 0.8% across the rest of the District, indicative of a tight office market. It should be noted however that not all properties/deals will be recorded on CoStar, as the dataset is weaker in rural areas.

2.11 As of September 2023, market rents in Derbyshire Dales were slightly below the average across the East Midlands at £12.89/sqft compared to £13.53/sqft, both of which were well below the UK average of £28.59/ sq.ft and insufficient in most instances to support new-build development in viability terms.

2.12 The Report also analysed net absorption over the five-year period to 2022. Net absorption describes the change in the amount of occupied space. Average net absorption over the period was 4,129 sqft per annum. Net absorption recovered in 2022 to 21,648 sqft - following a negative rate in 2021 of 19,060 sqft due to space being released onto the market, most likely a result of increased home working in response to the COVID-19 pandemic.

2.13 Take-up of office space dipped in 2020, likely due to the work from home mandate and economic uncertainty caused by the pandemic, however 2021 and 2022 saw some recovery in take-up, albeit not to the level seen in 2019. The majority of

take-up occurred in Matlock - 68% of floorspace transacted in 2021-22, followed by Ashbourne (13%) and Sudbury (9%).

Industrial Market

2.14 The 2023 Derbyshire Dales Housing & Employment Land Needs Assessment Update identified a decreasing vacancy rate within the Derbyshire Dales industrial market. As of September 2023, the vacancy rate was 1.6%, indicating a supply-constrained market.

2.15 The average inflation-adjusted market rent for industrial floorspace was £6.06 per sqft as of September 2023, below the East Midlands and UK averages at £7.12/sqft and £8.69/sqft respectively. Historic rental growth was noted to be slower than comparator areas.

2.16 The Report also analysed net absorption between 2018 and 2022. Net absorption peaked in 2018 at 94,400 sqft. Following a year of negative net absorption in 2019, net absorption of industrial space picked up slightly in 2020 at 13,328 sqft; however then returned to being negative in 2021 and 2022 (with more space coming onto the market than taken up).

2.17 There was no take-up of industrial floorspace in 2019, followed by a total of just 10,188 sq. ft in 2020. In 2021, take-up grew and 54,980 sq. ft was transacted in 12 deals.

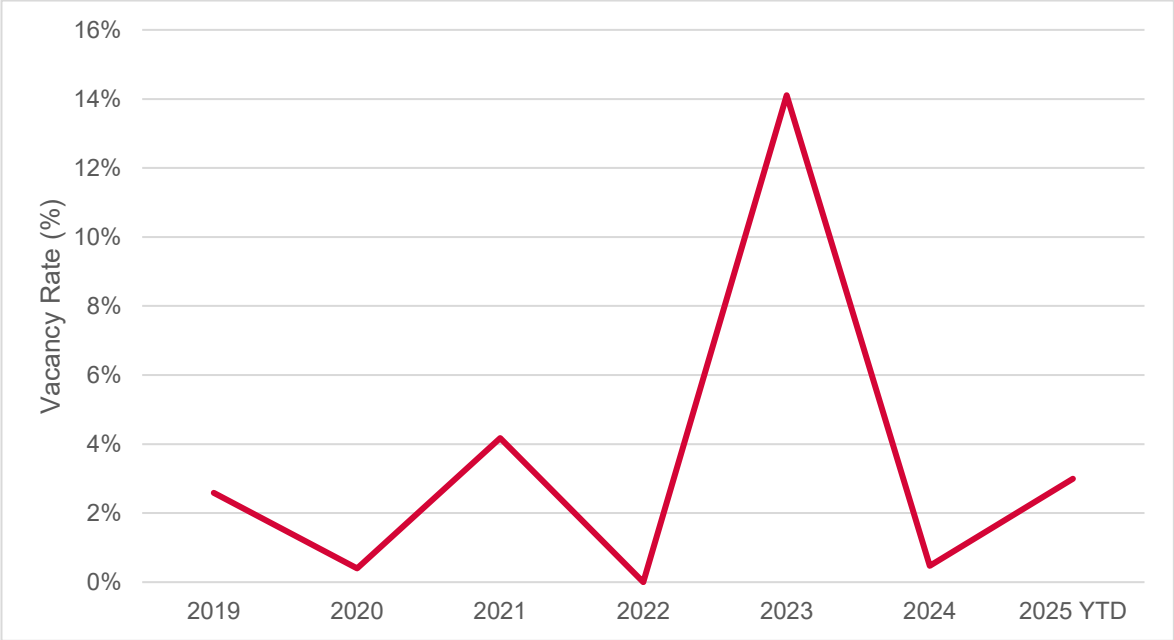
Recent Commercial Property Trends

Office Market

2.18 The figure below shows the vacancy rate for office floorspace in Derbyshire Dales, based on CoStar data. Since the spike in vacancy in 2023 (influenced by Chatsworth Hall), the vacancy rate has significantly reduced and currently sits at 3.0%. With the exception of 2023, the office vacancy rate has been below 5% since 2019, indicative of tight supply. It should however be noted that not all

properties/deals will be recorded on CoStar, as the dataset is weaker in rural areas.

Figure 2.1 Office Vacancy Rate, Derbyshire Dales

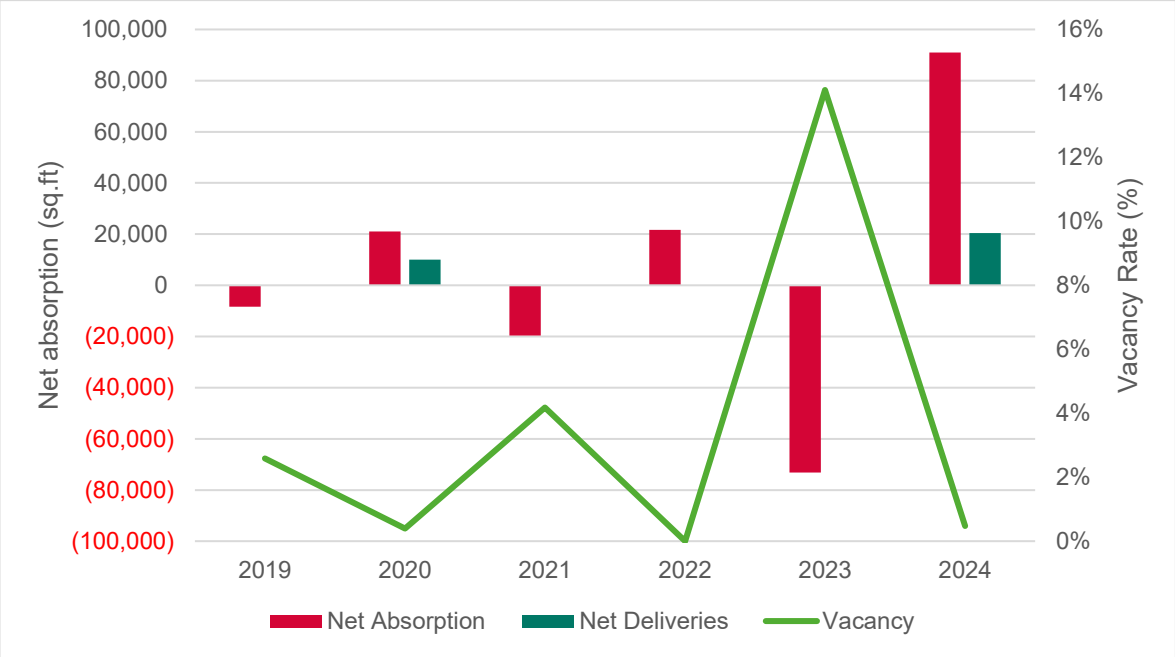


Source: CoStar, 2025

2.19 The figure below shows inflation-adjusted average market rents for office floorspace. Derbyshire Dales market rent has increased slightly since the 2023 HELNA, and now sits at £13.30 psf compared to £12.89 recorded as of September 2023. This remains slightly below the average across the East Midlands (£13.59) significantly below the UK average of £30.23 which is driven by prime rents in major cities. It continues to point to deliverability challenge for new-build space.

2.20 The figure below shows net absorption, vacancies and deliveries of office floorspace over the past 5 years. Average net absorption over the five-year period between 2020 and 2024 was 8,194 sqft per annum. 2023 saw negative net absorption, primarily related to Derbyshire County Council moving out of space at the Chatsworth Hall office campus. 2024 saw net absorption peak at 90,948 sqft.

Figure 2.2 Office Net Absorption and Net Deliveries, Derbyshire Dales

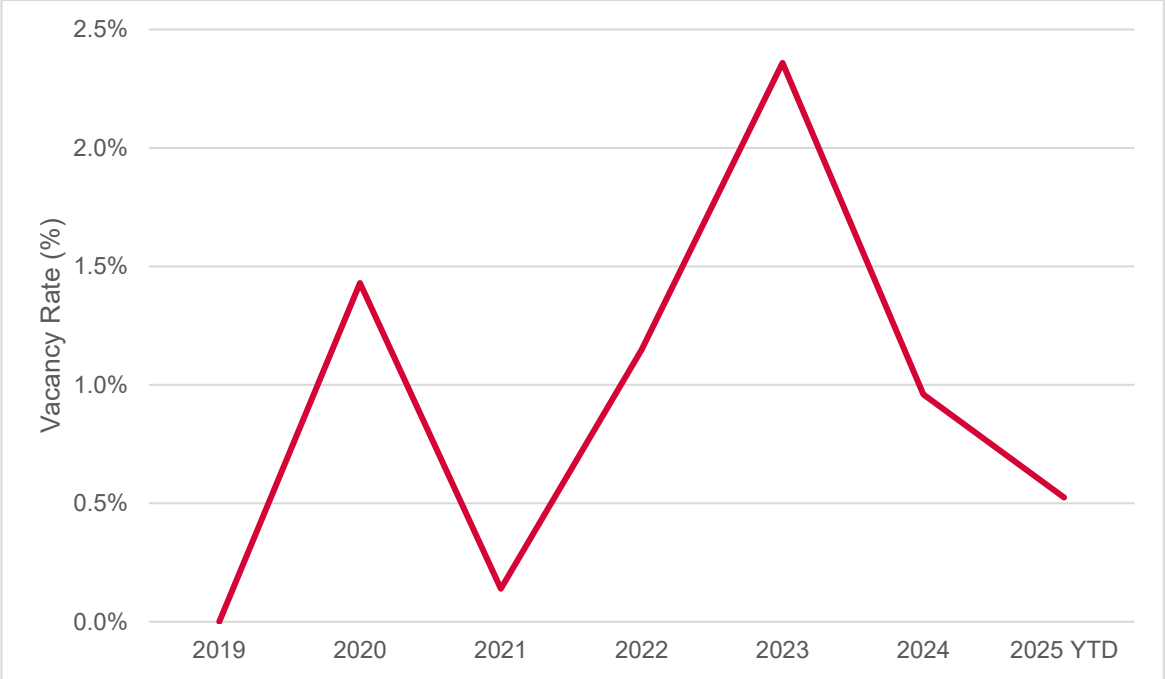


Source: CoStar, 2025

Industrial

2.21 The figure below shows the vacancy rate for industrial floorspace in Derbyshire Dales, based on CoStar data between 2019 and 2025. Over this time period, the vacancy rate has fluctuated but remained below 2.5%. The vacancy rate as of May 2025 is 0.5% and therefore the industrial market appears to remain supressed by a lack of supply.

Figure 2.3 Industrial Vacancy Rate – Derbyshire Dales

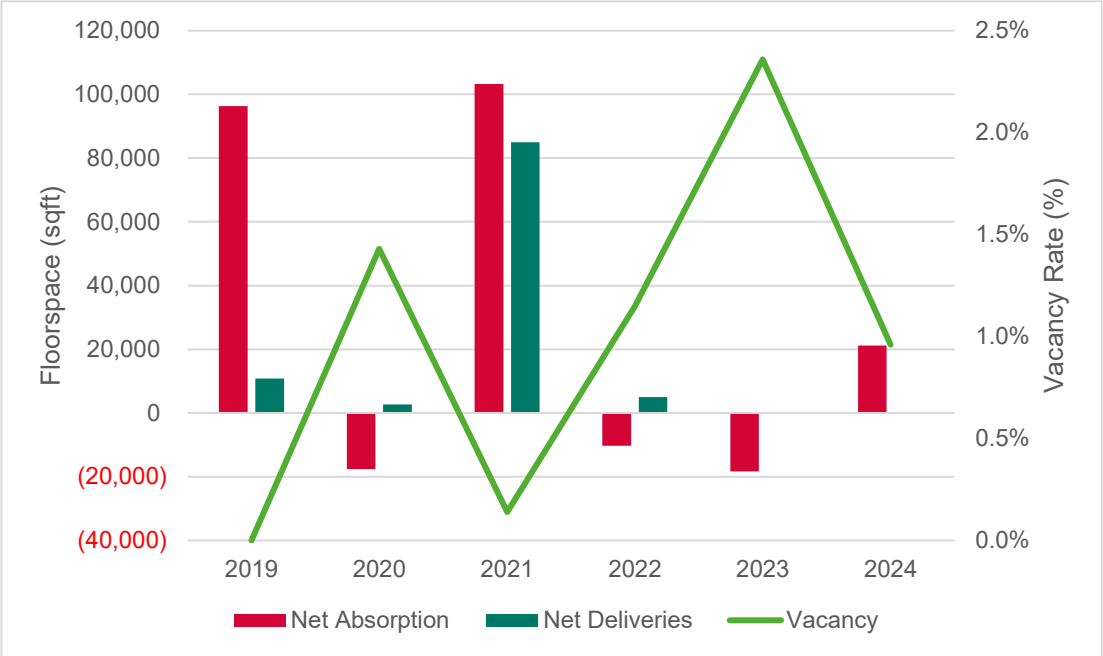


Source: CoStar, 2025

2.22 The figure below shows inflation-adjusted average market rents for industrial floorspace. According to CoStar data, Derbyshire Dales average market rent has risen since 2023, currently at £7.94 per sqft (May 2025), similar to the East Midlands average of £7.67/sqft, but below the UK average of £9.23/sqft.

2.23 The figure below shows net absorption, net deliveries and vacancy rate of industrial floorspace since 2019. It can be seen that in 2024 the vacancy rate has been driven down by positive net absorption of floorspace (more move ins than move outs) alongside no net deliveries of new space (such as through new-build development).

Figure 2.4 Industrial Net Absorption, Net Deliveries and Vacancy Rate – Derbyshire Dales



Source: CoStar, 2025

Labour Market Dynamics

Economic Activity

2.24 Turning to the dynamics of the Labour Market within Derbyshire Dales, the Annual Population Survey (APS) data points to the economic activity rate falling from a pre-pandemic figure of 82% to 71% in 2021 and recovering since to 75% (Year to December 2024). However cross-refencing this Survey-based source with the 2021 Census suggests that the APS may be significantly under-estimating economic participation in the District.

2.25 The Census 2021 pointed to an overall activity rate of 77.6% amongst 16-64 year olds in Derbyshire Dales in 2021. The table below shows the breakdown of Census economic activity rate by sub-area. The Southern Parishes have the highest rate at 79.6% and Matlock & Wirksworth the lowest at 76.2%. However overall, there is little variation between all sub areas with only 3.4pp difference between the highest and lowest.

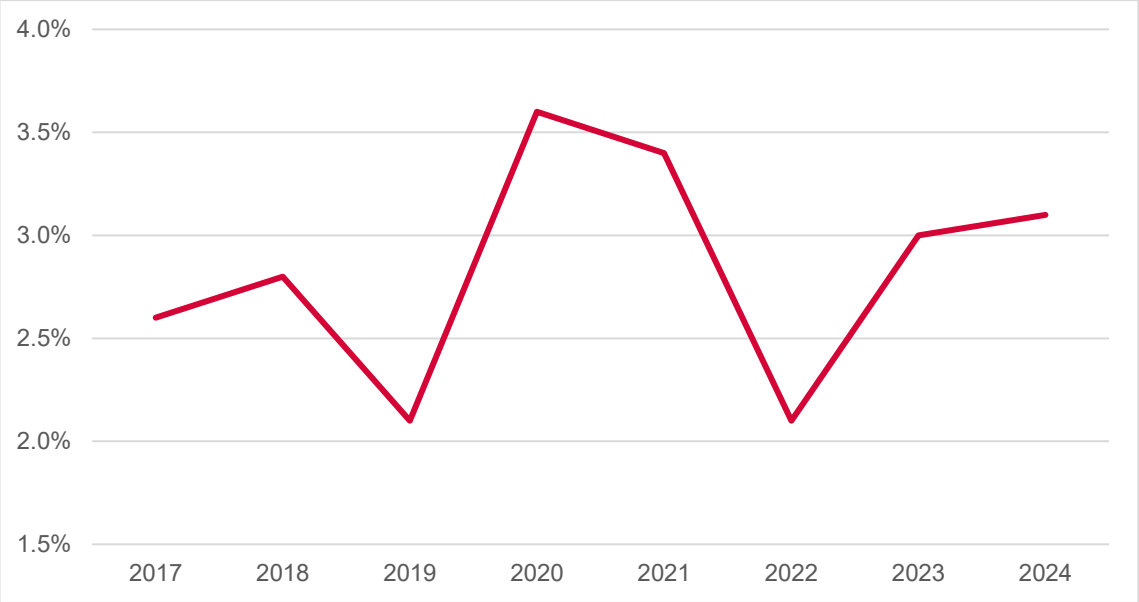
Table 2.3 Economic Activity (% Population aged 16-64)

Sub Area	Active	Inactive
Ashbourne	78.8%	21.2%
Matlock & Wirksworth	76.2%	23.8%
Peak District	78.0%	22.0%
Southern Parishes	79.6%	20.4%
Derbyshire Dales	**77.6%**	**22.4%**

Source: Census 2021

2.26 The figure below shows ONS model-based unemployment estimates for 16+ year olds. Data shows a jump during the pandemic in 2020 to 3.6%, this reduced to 2.1% in 2022 but has since risen to 3.1% in 2024.

Figure 2.5 Unemployment Rate – Derbyshire Dales



Source: ONS (2024)

2.27 Census data shows a lower level of unemployment across the District at only 2.7% in 2021, as shown in the table below. Ashbourne has the highest rate at 3.2% with the lowest in the Peak District at 2.3%. Again there is little variation between the sub areas with on 0.88% separating the two.

Table 2.4 Unemployment Rate, March 2021

Sub Area	Unemployment Rate
Ashbourne	3.2%
Matlock & Wirksworth	3.0%
Peak District	2.3%
Southern Parishes	2.3%
Derbyshire Dales	2.7%

Source: Census 2021

Earnings

2.28 Residence based earnings have continued to grow relatively strongly into 2024: this is particularly a factor of the ongoing cost of living pressures and inflation, as well as a tight labour market - employers increasing wages in order to retain staff.

2.29 However, when assessing the change in earnings since the Covid-19 outbreak residence-based earnings in the District have more than recovered since the pandemic, increasing by 41% from 2021 to 2024, compared to a growth of 20% across England. However workplace earnings have seen a much lower amount of growth. Between 2022 and 2023 earnings grew by 13% and then subsequently saw a decline of 4% between 2022 and 2023 - data is unavailable for 2024. This points to residents-based earnings growth being influenced by an increase in those in higher earners living in the District but commuting out.

Table 2.5 Median Annual Earnings

	2019	2020	2021	2022	2023	2024
Derbyshire Dales - Residence Based	£31,887	£35,011	£28,284	£33,747	£36,796	£39,979
Derbyshire Dales - Workplace Based	£27,749	£25,940	£27,761	£31,457	£30,181	N/A*
England	£30,692	£31,780	£31,445	£33,279	£35,194	£37,617

**Data unavailable*

Source: ONS Annual Survey of Hours & Earnings

2.30 **Overall, key characteristics of the District's economy and commercial market as described in the 2023 HELNA Update Report continue to broadly hold true**.

3. Scenarios for Economic Growth

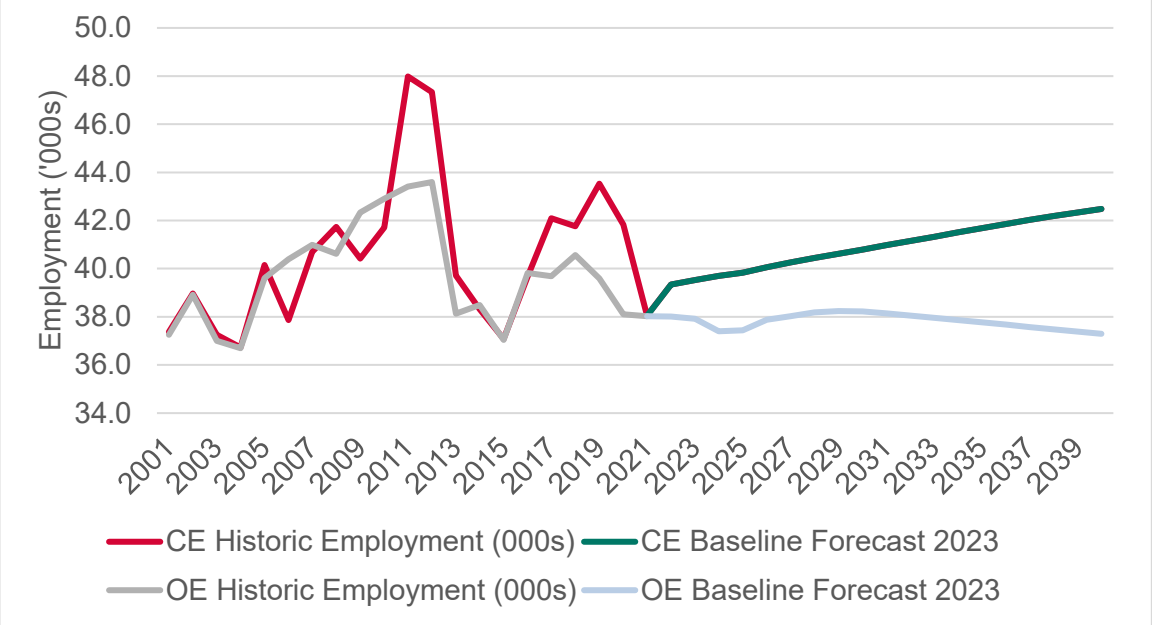
3.1 This section next turns to consider scenarios for future employment growth in Derbyshire Dales. It first reviews the scenarios presented in the 2023 Housing & Employment Land Needs Assessment (HELNA) Update Report, before moving on to consider the latest evidence and updated economic forecasts.

Growth Scenarios in the 2023 HELNA Update Report

Baseline Scenarios 2023

3.2 The previous Study provided 2017-2040 baseline forecasts from Cambridge Econometrics (CE) and Oxford Economics (OE). These forecasts are shown on the chart below.

Figure 3.1 OE and CE historic employment and employment forecasts



Source: Oxford Economics and Cambridge Econometrics

3.3 CE indicated a modest increase of c.400 jobs over the 2017-2040 period. It was forecast that following the drop in 2021 due to the COVID-19 pandemic, there

would be an initial rebound of 1,300 jobs and then steady employment growth thereafter.

3.4 OE indicated a different story, seeing a reduction in jobs of -2,400 between 2017 and 2040. OE were less confident regarding the outlook for employment in the manufacturing sector which they anticipated to decline, and it was this in particular that drove the overall forecast contraction in employment in the District.

Revised Labour Demand Scenario 2023

3.5 Following further analysis and engagement with key stakeholders, we found in the 2023 study a justification for some limited revision in the economic forecasts for Derbyshire Dales.

3.6 The CE forecasts were noted to be more optimistic across the majority of sectors, being driven largely by past performance. These were therefore considered to the upper range of outcomes, with the OE forecasts being more conservative – particularly in the tourism and manufacturing sectors.

3.7 The report noted that there is little evidence of potential for a significant collapse in the manufacturing sector, as forecast by OE, and therefore the CE outlook was taken for this sector. Similarly, the CE forecast was taken for the tourism sector as evidence suggested that the OE forecast was also overly pessimistic with regards to this sector.

3.8 These adjustments resulted in a ‘revised labour demand scenario’ which was presented therein.

Labour Supply Scenario 2023

3.9 The 2023 report also modelled a labour supply scenario which considered the level of jobs which could be supported by the conclusions on housing needs. Housing provision in line with the standard method (217 dwellings per annum) was expected to support workforce growth district-wide of 1,579 over the 2017-40 plan period.

3.10 The labour supply scenario took the 'adjusted' OE forecast was the start point and modelled additional jobs growth in target sectors (manufacturing, ICT, finance and business) and population driven sectors (distribution, construction, government services (education and health)).

Summary – Employment Change Forecasts, 2023

3.11 The 2023 scenarios for employment change are summarised in the table below. The 2023 study stated that the revised OE scenario and labour supply scenarios best fit the preferred outcomes for the district in terms of sector jobs change. Considering the need to plan positively for growth, the labour supply position was deemed to be a reasonable long term jobs position to plan for.

Table 3.1 **Total Employment Change: Baseline and Revised Scenarios**

Employment ('000s)	2017 -2040 change	2022- 2040 change	2040 count
CE	0.4	3.1	42.5*
OE	-2.4	-0.7	37.3
OE revised	-0.4	-	40.0
Labour supply	1.6	3.0	41.3

* CE assume a higher start point so final 2040 count is higher

3.12 However the report triangulated this with other forecasting techniques, as the PPG envisaged, and concluded that employment land provision should be based on the (higher) net completions trend.

Growth Scenarios 2025

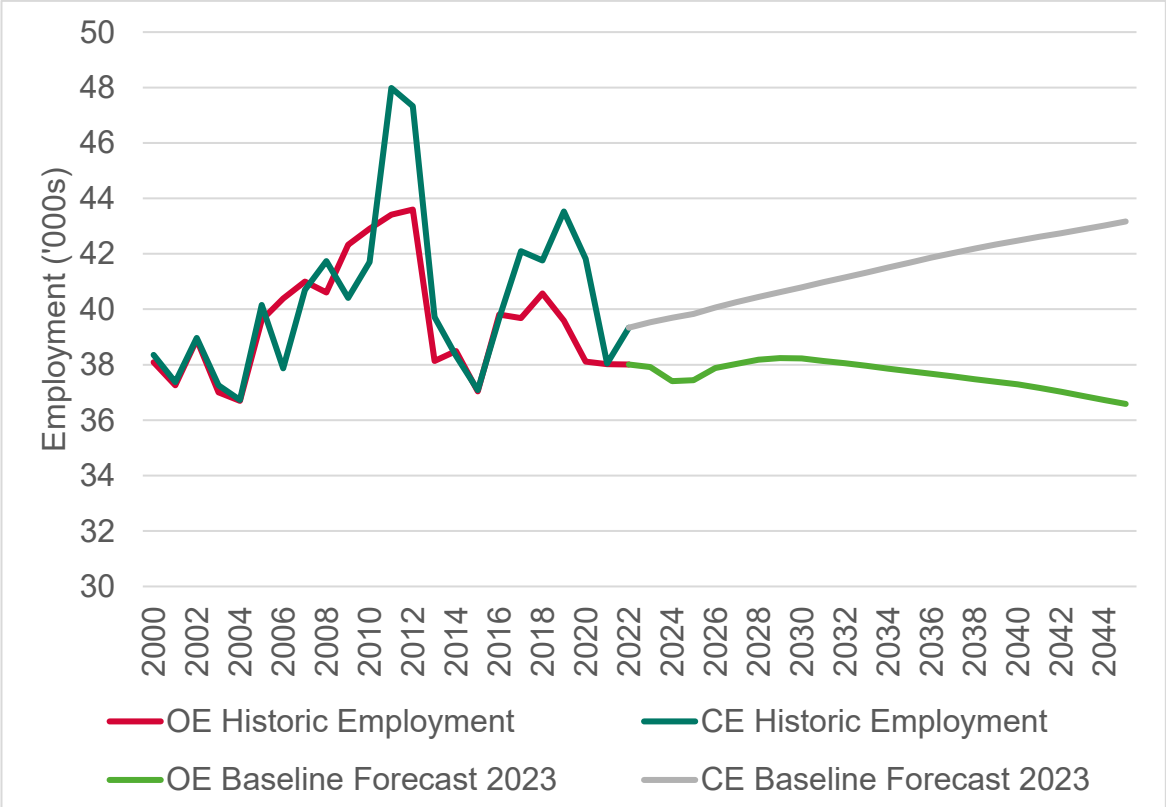
Labour Demand Scenarios 2025

3.13 For the purposes of this Study, updated baseline forecasts have not been commissioned from CE/OE, however, as presented in Section 3, analysis has been undertaken to identify whether there have been any significant changes in employment over the past two years since the previous study. Over the 2019 to

2023 period the majority of sectors remained broadly stable in terms of employment. The district's two largest sectors – accommodation and food service activities and manufacturing – both saw the same level of employment in 2023 as 2019, despite some annual fluctuations.

3.14 The chart below shows the OE and CE baseline forecasts for employment in Derbyshire Dales up to 2045. It is important to note that the sectoral outlook shown is influenced in part by improvements in productivity in different economic sectors.

Figure 3.2 OE and CE historic employment and employment forecasts



Source: Oxford Economics and Cambridge Econometrics

3.15 As previously outlined, the 2023 study also made two adjustments to the OE forecast to produce a revised OE forecast/ labour demand scenario. This took the CE forecasted growth for the manufacturing and tourism sectors as these were deemed to be overly pessimistic within the OE forecast.

3.16 Over the 2024-45 plan period, the CE and OE forecasts both expect a decline in manufacturing jobs, however OE expect a stronger decline (-1,600 jobs) compared to CE (-100 jobs). Long term trends suggest that Derbyshire Dales' manufacturing sector is relatively stable. Indeed OE historic data shows that over the 10 years between 2011 and 2021, the manufacturing sector saw a 6% increase in employment (300 jobs) whilst over a 20-year period, the sector saw a modest decrease in employment (-500 jobs). As explored in Section 3, recent BRES data also shows broadly stable employment within the sector. It therefore appears to remain reasonable to take forward the less pessimistic CE forecast outlook for the manufacturing sector.

3.17 The tourism sector is forecast by CE to see growth in employment over the plan period (1,200 jobs), whereas the OE forecast expects a modest loss of 100 jobs. OE historical employment data presents a long-term trend of growth within accommodation and food sector, with an increase in jobs of 1,800 (54%) between 2011-21 and 1,100 jobs (27%) between 2001-2021. As highlighted in Section 3, employment within the sector has remained fairly stable over recent years according to BRES data, recovering from a fall in employment in 2020. It therefore continues to seem reasonable to take the CE forecast for the accommodation and food sector, given that there does not appear to be evidence to suggest that the sector is likely to experience a decline.

Labour Supply Scenario 2025

3.18 The 2023 report also modelled a labour supply scenario which considered the level of jobs which could be supported by the conclusions on housing needs. Housing provision in line with the standard method was expected to support workforce growth of 1,579 over the 2017-40 plan period.

3.19 Since the preparation of the 2023 HEDNA Update, the Government has issued a revised NPPF in December 2024 and has revised the standard method for calculating housing need alongside this. Its ambitions in doing so are to increase housing delivery, delivering 1.5 million homes across England over the next 5 years.

3.20 The PPG recommends undertaking a labour supply scenario as one of the methods to forecast future employment land need. The labour supply scenario forecasts land need based on expected changes to labour supply, partly driven by expected housing delivery. Therefore, it is important to test the impact of the revised standard method on the labour supply scenario.

3.21 The 2023 HEDNA Update generated a need for 217 dwellings per annum (dpa) across Derbyshire Dales District under the previous standard method. The updated standard method generates a need for 573 dpa – an increase of 164% vs the previous method.

3.22 Analysis has been undertaken to produce a projection of labour supply growth over the plan period, given this new level of need for housing provision. Details of the specific modelling assumptions are set out in Appendices A1 and A2, but in broad terms, **housing provision in line with the standard method is expected to support workforce growth of around 13,700** (13,675) over the 2024-45 plan period[2]. This is significantly greater than that envisaged in the previous report.

3.23 As per the 2023 Update, the labour supply scenario:

- Uses the 'adjusted' OE forecast as the start point; and
- Apportions additional jobs across target sectors (manufacturing, ICT, finance and business) and population driven sectors (distribution, construction, government services (education and health)).

[2] Based on a 1:1 commuting assumption and OBR projected changes to economic activity rates.

Summary – Employment Forecasts

3.24 The table below reports the potential for change across the baseline, adjusted and labour supply scenarios.

Table 3.2 **Employment Forecasts by scenario and sector**

	Change 2024 – 2045 (thousands)				2045 position (thousands)			
	OE	OE Adjusted	CE	Labour supply	OE	OE adjusted	CE	Labour supply
Agriculture etc	-0.1	-0.1	-0.1	-0.1	0.9	0.9	0.9	0.9
Mining & quarrying	-0.2	-0.2	-0.1	-0.2	0.1	0.1	0.3	0.1
Manufacturing	-1.6	-0.1*	-0.1	2.4	2.8	4.3	4.6	6.8
Electricity, gas & water	-0.0	-0.0	0.0	0.0	0.2	0.2	0.2	0.0
Construction	0.3	0.3	0.2	1.8	3.0	3.0	2.7	0.2
Distribution	-0.1	-0.1	0.5	2.6	4.8	4.8	6.4	4.5
Transport & storage	-0.2	-0.2	-0.1	-0.2	0.9	0.9	1.2	7.5
Accommodation & food	-0.1	1.2**	1.2	1.2	5.2	6.5	6.9	0.9
ICT	0.1	0.1	0.3	0.6	1.0	1.0	1.3	6.5
Financial & business	0.3	0.3	0.7	0.4	4.9	4.9	5.6	5.0
Government services	0.0	0.0	0.8	4.4	8.6	8.6	9.7	13.0
Other services	0.7	0.7	0.2	0.7	4.1	4.1	3.4	4.1
Total	-0.8	1.9	3.5	13.7	36.6	39.3	43.2	51.1

Source: Cambridge Econometrics, Oxford Economics, Iceni analysis

NB: may not sum due to rounding, 2045 OE/CE positions have different start nos

** CE position*

*** CE position*

3.25 The scenarios are summarised below. The revised OE scenario and labour supply scenarios best fits the preferred outcomes for the district in terms of sector jobs change. Considering the need to plan positively for growth, the labour supply position provides an important input to consider what scale of employment land to plan for. It will however need to be considered taking account of land supply considerations which could impact on the scale of growth which can be

sustainably accommodated in the District. These are issues for the Council to consider in bringing together the evidence as part of the plan-making process.

Table 3.3 **Total Employment Change: Baseline and Revised Scenarios**

Employment ('000s)	2024 count	2045 count	2024-45 change
CE	39,700	43,200	3,500
OE	37,400	36,600	-800
OE revised	37,400	39,300	1,900
Labour supply	37,400	51,100	13,700

Source: Iceni analysis of Oxford Economics and Cambridge Econometrics

Disaggregating Economic Scenarios for the LPA and National Park

3.26 The employment forecasts presented thus far have been for the Derbyshire Dales District as a whole. Further analysis has been undertaken to break this down for the Local Planning Authority (LPA) area and the National Park (where this sits within Derbyshire Dales District).

3.27 The table below breaks down the forecasted employment change for the Plan period for the LPA area and National Park area based on the current proportion of sector employment (BRES 2023). The modelling is indicative and 'demand based' in that it is driven by the distribution of employment in different sectors now: it does not take account of supply-side factors such as land availability.

3.28 Appendix A2 sets out employment projections for the LPA area and NP separately. As per the District level labour supply scenario, it is assumed that:

- The 'adjusted' OE forecasts for the LPA and NP areas are the starting point;
- Additional jobs are apportioned across target sectors (manufacturing, ICT, finance and business) and population driven sectors (distribution, construction, government services (education and health)) in line with their current proportions across the LPA and NP areas.

3.29 Under the baseline scenario, the LPA and NP areas both see losses in employment, of 570 and 250 jobs respectively. In both cases, this is mainly driven by significant forecast losses within the manufacturing sector within this scenario.

3.30 Under the adjusted OE scenario, both areas gain a similar number of jobs – 1,050 for the LPA area and 900 for the NP. The NP sees an almost equal share of the jobs growth given its share of the Accommodation and food services sector, presumably driven by the prominent tourism sector within the National Park.

3.31 Under the labour supply scenarios, the LPA area experiences considerably greater levels of employment growth. The NP sees a slight reduction in jobs under Labour Supply Scenario A, given that the 40 dpa assumed housing provision figure results in a negative projection for labour supply. Under Scenario B, the NP sees modest growth in employment by 270 jobs.

Table 3.4 Forecasted employment change (2024-45) by LPA area and National Park area – Baseline, Alternative and Labour Supply Scenarios

	LPA area				National Park area			
	OE	OE Adjusted	Labour Supply - Scenario A (415 dpa)	Labour Supply – Scenario B (523 dpa)	OE	OE Adjusted	Labour Supply - Scenario A (40 dpa)	Labour Supply – Scenario B (50 dpa)
Agriculture etc	-30	-30	-30	-30	-30	-30	-30	-30
Mining & quarrying	-80	-80	-80	-80	-80	-80	-80	-80
Manufacturing	-1,100	-60	1,910	2,600	-480	-30	-270	-200
Electricity, gas & water	-10	-10	-10	-10	-10	-10	-10	-10
Construction	210	210	1,400	1,820	70	70	-5	-10
Wholesale & retail	-60	-60	1,860	2,530	-30.	-30.	-310	-220
Transport & storage	-90	-90	-90	-90	-70	-70	-70	-70
Accommodation & food services	-30	550	550	550	-40	660	660	660
Information & communications	70	70	410	530	30	30	-10	10
Financial & business services	230	230	320	350	90	90	80	80
Government services	-60	-60	3,630	4,930	20	20	-210	-130
Other services	400	400	400	400	270	270	270	270
Total	**-570**	**1,050**	**10,260**	**13,490**	**-250**	**900**	**-30**	**270**

4. Employment Land Requirements – District Level

Findings from the Previous Study

4.1 The 2023 HELNA Update recommended to plan for the net completions forecast of 15-16 ha and up to 18 ha (rounded) based on the 'new build' trend from 2017 to 2040. It was noted that the upper end was derived from a more recent period however the market indicators suggested that demand remained relatively healthy particularly in the industrial sector and was expected to do so for the foreseeable future.

4.2 These requirements included a sensitivity which reduced office need by 50% to reflect changing working patterns following the COVID-19 pandemic; a 7.5% uplift to allow for vacant floorspace to support turnover and improvements to stock and a 5-year margin based on past employment land take-up (0.73 ha per annum).

Updated Employment Land Scenarios

4.3 In this section we consider demand for employment land and floorspace over the period from 2024-45 using the most up to date data. The section considers requirements for employment land in offices (Class E(g)(i)); research and development premises (Class E(g)(ii)); light industrial (Class E(g)(iii)); general industrial (Class B2) and storage or distribution (Class B8).

4.4 When considering the scale of future needs the Planning Practice Guidance (PPG, 2020) requires consideration of quantitative and qualitative need. This entails estimating the scale of future needs broken down by different market segments, such as different B use classes. The PPG recommends the use of a number of different techniques to estimate future employment land requirements, namely assessments based on:

- Labour Demand;
- Labour Supply; and
- Past Take-Up.

4.5 There are relative benefits of each approach. For Labour Demand scenarios and Labour Supply Scenarios, econometric forecasts take account of differences in expected economic performance moving forward relative to the past, overall, with regard to the sectoral composition of growth. However, a detailed model is required to relate net forecasts to use classes and to estimate gross floorspace and land requirements.

4.6 In contrast, past take-up is based on actual delivery of employment development; but this does not take account of the implications of growth in labour supply associated with housing growth nor any potential differences in economic performance relative to the past. It is also potentially influenced by past land supply policies.

4.7 Scenarios are presented on a Derbyshire Dales District level, as econometric models are only readily available at a local authority level, however the need has been broken down at the LPA and NP area levels (indicatively) in Chapter 6, based on the current split of employment in each area.

Labour Demand and Supply Scenarios

4.8 This section takes forward the economic growth forecasts set out in Chapter 4.

- The OE Baseline Scenario considers the quantum of employment land required to support the growth shown in this trend-based forecast (-800) over the 2024-45 period;
- The OE Adjusted Scenario models the implications of adjustments, resulting in total employment growth of 1,900 jobs;

- The Labour Supply Scenario considers the quantum of employment land required to support the growth of 13,700 jobs in line with projected population growth.

4.9 The forecasts for total employment by sector have been converted into forecasts for Full-Time Equivalent (FTE) employment by sector through analysis of the proportion of full- and part-time jobs in Derbyshire Dales on a sector-by-sector basis.

4.10 The Table below shows the FTE percentage for each sector in the district. This is used in relating the forecasts for total employment to expected growth in Full-Time Equivalent (FTE) employment which is used in calculating employment floorspace and land requirements. The broad sectors have been aggregated from their 2-digit components.

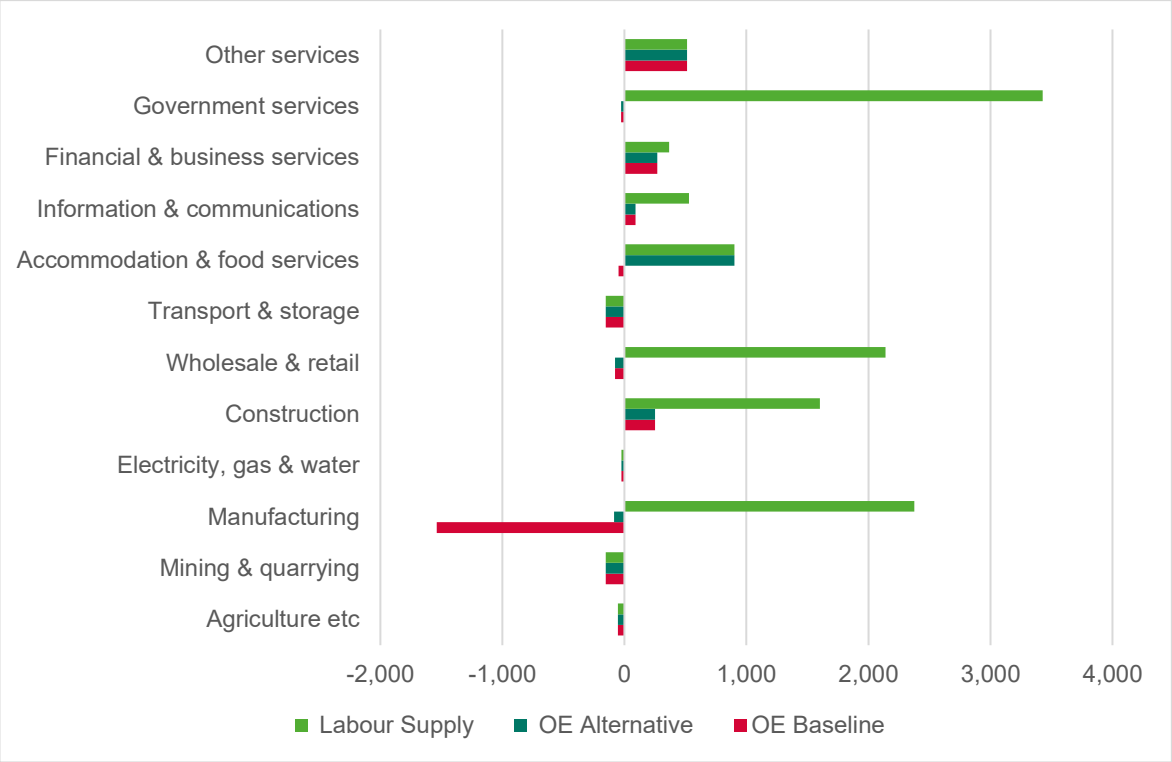
Table 4.1 Percentage of FTE jobs per broad sector

Area	% Full Time Workers
Agriculture etc	97%
Mining & quarrying	90%
Manufacturing	97%
Electricity, gas & water	99%
Construction	90%
Wholesale & retail	82%
Transport & storage	94%
Accommodation & food services	75%
Information & communications	92%
Financial & business services	86%
Government services inc. health	79%
Other services	76%

Source: Iceni analysis of BRES (2023)

4.11 Figure 5.1 provides net change in the number of FTE jobs overall for 2024-2045, being -950 for the baseline, 1,460 for the alternative scenario and 11,480 for the labour supply scenario. The difference between the jobs and the FTE employment overall change is driven by the lower proportion of full-time workers in the Accommodation and food services and Wholesale and retail sectors which drive the jobs growth over the Plan period.

Figure 4.1 FTE employment change, Scenarios 2024-45



Source: Iceni analysis of Cambridge Econometrics and Oxford Economics data

4.12 Consideration has then been taken for the proportion of employment in each of these sectors which is likely to take place in the various use classes. The assumptions remain the same as those used within the 2023 HELNA Update.

4.13 These assumptions have then been used to derive the following forecasts of net growth in FTE employment by use class over the plan period, relating to the District as a whole. This apportionment is then multiplied by the jobs growth in each sector, showing growth by class of employment. The table below sets out the 5-year band requirements.

Table 4.2 FTE Job Growth by Use Class, 2024-45: Oxford Economics Baseline Scenario (OE)

Area	2024-25	2025-30	2030-35	2035-40	2040-45	2024-45
Offices Class E(g)(i)	16	251	39	28	-11	323
R&D Class E(g)(ii)	-2	-12	-18	-17	-17	-66
Light industrial Class E(g)(iii)	-15	-81	-99	-91	-91	-377
General industrial (Class B2)	-46	-232	-275	-252	-250	-1055
Storage or distribution (Class B8)	3	4	-30	-31	-250	-305
Total of above	**-43**	**-70**	**-383**	**-364**	**-620**	**-1480**
Other Use Classes	58	636	-57	-86	-227	324

Source: Iceni analysis of Cambridge Econometrics

Table 4.3 FTE Job Growth by Use Class, 2024-45: Oxford Economics Alternative Scenario (OE)

Area	2024-25	2025-30	2030-35	2035-40	2040-45	2024-45
Offices Class E(g)(i)	16	251	39	28	-11	323
R&D Class E(g)(ii)	71	-12	-18	-17	-17	7
Light industrial Class E(g)(iii)	349	-81	-99	-91	-91	-14
General industrial (Class B2)	973	-232	-275	-252	-250	-36
Storage or distribution (Class B8)	3	4	-30	-31	-250	-305
Total of above	**1,411**	**-70**	**-383**	**-364**	**-620**	**-26**
Other Use Classes	1,008	636	-57	-86	-227	1,274

Source: Iceni development from Oxford Economics

Table 4.4 FTE Job Growth by Use Class, 2024-45: Labour Supply Scenario

Area	2024-25	2025-30	2030-35	2035-40	2040-45	2024-45
Offices Class E(g)(i)	683	251	39	28	-11	990
R&D Class E(g)(ii)	242	-12	-18	-17	-17	178
Light industrial Class E(g)(iii)	1,124	-81	-99	-91	-91	761
General industrial (Class B2)	2,879	-232	-275	-252	-250	1,870
Storage or distribution (Class B8)	624	4	-30	-31	-250	317
Total of above	**5,553**	**-70**	**-383**	**-364**	**-620**	**4,116**
Other Use Classes	6,885	636	-57	-86	-227	7,151

Source: Iceni development from Oxford Economics

4.14 To these figures we have applied employment densities taking account of the HCA Employment Densities Guide: 3rd Edition (Drivers Jonas Deloitte, 2015). We have converted figures to provide employment densities for gross external floor areas on the following basis:

- Office: an average of 14 sq m GEA per employee based on a blend between business park, serviced office and general office floorspace and assuming that the gross external area of buildings is on average 20% higher than the net internal area – note that further sensitivity is run on this further below to take account of remote working practices;
- Research and development: an average of 48 sq m GEA per employee based on low density research premises and assuming that the gross external area of buildings is on average 20% higher than the net internal area;
- Light Industrial: an average of 49 sq m GEA per employee, assuming that the gross external area of buildings is on average 5% higher than the net internal area;

- General Industrial: an average of 38 sq m GEA per employee, assuming that the gross external area of buildings is on average 5% higher than the gross internal area;

- Warehouse/ Distribution: an average of 65 sq m GEA per employee. This is slightly below the middle of the range of employment densities for B8 activities, reflecting the predominantly smaller stock and lack of large scale and high bay warehousing in the district.

4.15 Applying these employment densities to the forecasts of net growth in jobs in B-class activities, we can derive forecasts for net changes in employment floorspace. The breakdown by use class is shown below for the baseline, alternative and labour supply scenarios.

Table 4.5 Floorspace (sqm) requirements by Use Class 2024-45, Baseline Scenario (CE)

Area	2024-25	2025-30	2030-35	2035-40	2040-45	2024-45
Offices Class E(g)(i)	212	3,146	488	346	-141	**4,051**
R&D Class E(g)(ii)	-101	-585	-871	-799	-819	**-3,174**
Light industrial Class E(g)(iii)	-718	-4,009	-4,900	-4,499	-4,500	**-18,626**
General industrial (Class B2)	-1,722	-8,786	-10,384	-9,523	-9,454	**-39,869**
Storage or distribution (Class B8)	170	281	-1,960	-2,036	-16,257	**-19,802**
Total	**-2,160**	**-9,952**	**-17,627**	**-16,511**	**-31,170**	**-77,420**

Source: Iceni analysis of Cambridge Econometrics

Table 4.6 Floorspace (sqm) requirements by Use Class 2024-45, Alternative Scenario (OE)

Area	2024-25	2025-30	2030-35	2035-40	2040-45	2024-45
Offices Class E(g)(i)	212	3,146	488	346	-141	**4,051**
R&D Class E(g)(ii)	3,390	-585	-871	-799	-819	**318**
Light industrial Class E(g)(iii)	17,229	-4,009	-4,900	-4,499	-4,500	**-679**
General industrial (Class B2)	36,769	-8,786	-10,384	-9,523	-9,454	**-1,378**
Storage or distribution (Class B8)	170	281	-1,960	-2,036	-16,257	**-19,802**
Total	**57,770**	**-9,952**	**-17,627**	**-16,511**	**-31,170**	**-17,490**

Source: Iceni analysis of Oxford Economics

Table 4.7 Floorspace (sqm) requirements by Use Class 2024-45, Labour Supply Scenario

Area	2024-25	2025-30	2030-35	2035-40	2040-45	2024-45
Offices Class E(g)(i)	9,211	3,146	488	346	-141	**13,050**
R&D Class E(g)(ii)	11,633	-585	-871	-799	-819	**8,560**
Light industrial Class E(g)(iii)	55,461	-4,009	-4,900	-4,499	-4,500	**37,553**
General industrial (Class B2)	108,825	-8,786	-10,384	-9,523	-9,454	**70,678**
Storage or distribution (Class B8)	40,581	281	-1,960	-2,036	-16,257	**20,609**
Total	**225,711**	**-9,952**	**-17,627**	**-16,511**	**-31,170**	**150,451**

Source: Iceni analysis of Oxford Economics

4.16 Iceni has also considered a further sensitivity, reflecting changing working patterns that most particularly influence office needs. Following the pandemic, many office-based employees have adopted flexible or hybrid working patterns, reducing the future need for office space. A sensitivity that reduces office need 50% is considered – this aligns with the 2023 HELNA Update assumption. Post pandemic occupancy rates run at around 40% compared with 60-80% pre pandemic[3]. Workers in Derbyshire Dales may be more likely to work remotely, taking advantage of the quality of life whilst minimising office-based costs / commutes.

Table 4.8 Net floorspace (sqm) requirements by Use Class 2024-45, Office Sensitivity

	Area	2024-25	2025-30	2030-35	2035-40	2040-45	2024-45
Baseline	Offices Class E (g)(i)	106	1,573	244	173	-70	2,026
	Total	**-2,266**	**-11,525**	**-17,871**	**-16,684**	**-31,100**	**-79,445**
Alternative	Offices Class E(g)(i)	106	1,573	244	173	-70	2,026
	Total	**57,664**	**-11,525**	**-17,871**	**-16,684**	**-31,100**	**-19,515**
Labour supply	Offices Class E (g)(i)	4,606	1,573	244	173	-70	6,525
	Total	**221,105**	**-11,525**	**-17,871**	**-16,684**	**-31,100**	**143,926**

Source: Iceni analysis of Cambridge Econometrics

[3] https://www.fmj.co.uk/third-highest-weekly-figure-for-uk-office-occupancy-since-the-start-of-the-pandemic/
https://www.costar.com/article/1336525308/uk-office-occupancy-holding-up-despite-summer-challenges

4.17 To calculate the land requirements to support these net changes, we have applied the following plot ratios consistent with the 2015 HEDNA, 2020 ELR and 2023 HELNA Update.

- 0.3 for B1a/b office and R&D uses;
- 0.4 for B1c and B2 industrial uses; and
- 0.5 for B8 warehouse / distribution floorspace.

4.18 This generates the following requirement for net additional land to support employment growth over the plan period:

Table 4.9 Net land (ha) requirements by Use Class 2024-45

Area	Baseline	Alternative	Labour supply
Offices / R&D Class E(g)(i) & (ii)	0.3	1.5	7.2
Light industrial Class E(g)(iii)	-4.7	-0.2	9.4
General industrial (Class B2)	-10.0	-0.3	17.7
Storage or distribution (Class B8)	-4.0	-4.0	4.1
Total	**-18.3**	**-3.0**	**38.4**

**Office sensitivity adjustment is negligible when converted to hectares*

Source: Iceni analysis of Cambridge Econometrics / Oxford Economics

Completions Trend

4.19 The table below provides an update of the average completions trend, incorporating the latest 2023/24 data. The table below sets out the average completions for the 2000-15 period and the 2015/16- 2023/24 periods.

Table 4.10 Completions data 2015/16 – 2022/23 and 2000-2015, annual averages (sq.m)

Area	Loss		Gain		Net		
	2000-2015	2015/16-2023/24	2000-2015	2015/16-2023/24	2000-2015	2015/16-2023/24	2000-2024**
B1mix	230	121	357	668	127*	547	284
B1/B2/B8	0	0	401	381	401	381	394
B1a	0	175	38	279	38	124	70
B1ab	0	141	0	126	-	0	-
B1c	0	1,818	75	334	75	-1,484	-510
B1c/B8	0	0	-	1,442	-	1,442	541
B2	613	1,849	610	305	-3	-1,544	-581
B2/B8	0	0	-	324	-	324	121
B8	0	320	185	2,001	185	1,681	746
Total	842	4,390	1,667	5,859	825	2,911	1,607

Source: Iceni analysis of Derbyshire Dales District Council Monitoring

** Listed as 357 in 2017 HEDNA but considered erroneous based on gross / loss data*

*** weighted averages*

4.20 The updated outcomes of the annual average have been modelled forwards as below for the updated plan period of 2024-45.

4.21 The gross figures are useful in terms of understanding the type of units being demanded by the market – with B8 or a mix of industrial being highest. However this is not an indication of total needs as many development sites are recycled.

4.22 **The net completions figure is considered to mask the overall employment land need**. This is because it assumes that all employment space can take place on brownfield sites, which is not the case in Derbyshire Dales due to issues of historic contamination and abnormal costs that are often found on old quarry sites.

4.23 Analysis of 2015/16 to 2023/24 monitoring data (below) indicates that of 52,819 sqm gross completions, 20,899 sqm (2,322 sqm per annum) were recorded as

new build developments with the remainder change of use, redevelopment or alternations.

4.24 New build data was heavily influenced by a single completion of 8,430 sqm in 2018/19 for B1c/B8 at Long Lane, Ashbourne (commercial units at Woodhouse Farm). As this has such a bearing on the outcome, modelled projections have been considered with and without this completion.

4.25 The new build rate is a better indicator for future requirements of allocated space as this is the additional land that is needed, although the new build specific monitoring is only available for a very recent period and is therefore influenced by single developments.

Table 4.11 Completions data projections, 2024-45 requirements (sqm)

Type	2000-24 net	2000-24 gross	2015/16-23/24 net	2015/16-23/24 gross	2015/16-23/24 New build sites	2015/16-23/24 New build (exc outlier)
B1mix	5,971	9,944	11,478	14,021	2,473	2,473
B1/B2/B8	8,265	8,265	8,006	8,006	3,365	3,365
B1a	1,474	2,699	2,602	5,868	1,619	1,619
B1ab	-	989	-	2,637	-	-
B1c	-10,706	3,611	-31,173	7,005	-	-
B1c/B8	11,355	11,355	30,280	30,280	23,420	3,750
B2	-12,202	10,408	-32,433	6,405	3,766	3,766
B2/B8	2,551	2,551	6,802	6,802	240	240
B8	15,663	18,183	35,292	42,012	13,881	13,881
Total (sq. m)	33,752	68,017	61,131	123,034	48,764	29,094
Total (Ha)	**5.0**	**16.6**	**6.2**	**29.5**	**11.7**	**6.8**

Source: Iceni analysis of Council Monitoring

4.26 A further sense check is the net absorption rate recorded on CoStar. This is the amount of additional floorspace absorbed by the market each year after lease expiries are taken into account. The 2015 – 2024 average is 412 sq. m for office floorspace and 2,218 sq. m for industrial floorspace. When rolled forward for the 2024-45 Plan period this would be a total of 55,233 sqm or 13.2 Ha.

4.27 In a more rural area like Derbyshire Dales a number of transactions for smaller units will take place and not be recorded on CoStar, so this will underestimate the volume of deals and market needs.

Table 4.12 Net absorption CoStar take-up trend forecast 2024-45

	2015-2024 Average (sq. m)	2024-45 Needs (sq. m)	2024-45 Needs (Ha)
Offices	412	8,645	2.9
Industrial	2,218	46,588	10.4
Total	N/A	**55,233**	**13.2**

Source: Iceni analysis of CoStar

Summary

4.28 This section has undertaken a range of detailed modelling to consider the future employment land needs of the district.

4.29 As per the 2023 HELNA update, to provide an indication of the potential gross need for employment land in this scenario, it may be appropriate to make some allowance for frictional vacancy within employment floorspace; and provide some margin within the supply of land to provide a choice of sites.

4.30 We have assumed a need to achieve a 7.5% vacancy rate within the additional floorspace (midpoint between 5-10%), which is what we would consider reasonable in a functioning commercial property market. A level of vacant floorspace is necessary to support turnover and improvements to stock.

4.31 The modelled forecasts in certain scenarios are net changes and do not take account of replacement demand, such as from existing companies requiring upgraded floorspace or for existing or allocated sites for employment lost to other uses such as residential. In considering how much employment land to allocate, it is therefore appropriate to consider this as an additional influence, particular with notably losses to residential identified and some of the district stock being quite aged. As per the 2023 HELNA Update, a replacement rate of 50% of average

historical losses to residential has been applied to take account of replacement demand. This reflects that some sites and units being lost may need replacement, but not all of them given some traditional industrial processes ending that represent structural change. It is not appropriate to apply this to scenarios based on gross completions or new-build development trends, which will inherently already take account of replacement demand; however it is applied in other scenarios.

4.32 In identifying how much land to allocate for development, we however consider that it would be prudent to include a general 'margin' to provide for some flexibility, recognising:

- The potential error margin associated with the forecasting process;
- To provide a choice of sites to facilitate competition in the property market;
- To provide flexibility to allow for any delays in individual sites coming forward.

4.33 As per the 2023 HELNA Update, we consider that it would be appropriate to make provision for a 5-year 'margin' based on past employment land take-up. Over the last 24 years (2000-24) gross employment completions have averaged 0.79 hectares per annum. This equates to a 5-year margin of 4.0 ha for the plan period.

4.34 The table below reports the total employment land need 2024-45 across the various models discussed above. The future vacancy of 7.5% and 5-year margin of 4.0 Ha has been applied to all models. A replacement demand adjustment of 5.9 Ha (calculated at a rate of 50% of historical losses) has been made to the labour demand model and the net completions models.

4.35 As noted earlier in the Chapter, scenarios are presented on a Derbyshire Dales District level, as econometric models are only readily available at a local authority level, however the need has been broken down at the LPA and NP area levels (indicatively) in Chapter 6, based on the current split of employment in each area.

Table 4.13 Employment land needs – Derbyshire Dales District 2024-45, ha

	Labour demand – OE Baseline Scenario	Labour demand – OE Alternative Scenario	Labour Supply Scenario	2000-24 Net Completions	2000-24 Gross Completions	2016-24 Net Completions	2016-24 Gross Completions	2016-24 New Build Sites Completions	2016-24 New Build Completions (excl Outlier)	2015-24 Net Absorption
Modelled need	-18.3	-3.0	38.4	5.0	16.6	6.2	29.5	11.7	6.8	13.2
Future vacancy (7.5%)	0.1	0.1	0	0.4	1.2	0.5	2.2	0.9	0.5	1.0
5-year margin (gross completions)	4.0									
Replacement Demand (@50% losses)	5.9	5.9	5.9	5.9		5.9				
Total	**-8.3**	**7.0**	**48.3**	**15.3**	**21.8**	**16.6**	**35.7**	**16.6**	**11.3**	**18.2**

4.36 The key issues in this table are:

- **Labour demand:** the baseline labour demand model has produced a negative requirement of -18.3 ha, driven particularly by negative employment forecasts for industrial sectors. However this is driven in particular by investments in automation and wider productivity improvements, and is considered unlikely to be either an appropriate assessment of floorspace needs or to be an appropriate scenario to plan for. The Alternative Scenario shows the sensitivity of this to the assumed employment outlook for key sectors – in particular manufacturing; but the issues of a disconnect between space needs and employment remain.

- **Labour supply:** The labour supply scenario now indicates a significantly higher need for 48 ha of employment land over the revised plan period. This is notably above other scenarios which are based on past trends, and is particularly driven by the significant step change in housing delivery envisaged by the standard method, the effects of which on workforce growth are similarly transformational. In these terms, a significantly higher employment land requirement is support a balance between jobs and homes.

- **Completions gross** trend data indicates a good rate of demand for new commercial premises although much of this is refurbishment, change of use or redevelopment – all of which require little or no additional land. The 21.8 ha comes from the long run dataset, whilst using a shorter-term trend shows this increase to 35.7 ha. Elements of this will model will however be capable of being accommodated through redevelopment on existing employment sites.

- **Completions net trend** data reports 15-17 ha of need (depending on the historic model period) which is broadly in line with the previous 2023 report position (15-16 ha). This is in part due to the inclusion of a factor to replace sites lost to residential, which is considered reasonable particularly considering persistent low industrial vacancy rates.

- **Completions new build** data reflects the ‘new sites’ developed and a useful indicator of additional land needs rolled forward. Excluding one site considered to be an outlier, the need is 11.3 ha, below the net completions of 15-17 ha.

- **Net absorption:** this provides a useful sense check on total space being taken up by the market and reflects the net change in floorspace. This points to an 18 ha employment land requirement over the plan period.

4.37 A number of the trend-based models converge around the 15-18 ha range and this would represent a reasonable level of growth to plan for on the basis of local commercial needs. It is broadly in line the findings of the previous work.

4.38 However, the revised standard method points to the need to significantly uplift the scale of residential development in the District; and **it will be important to consider the balance between this and employment land provision**. Higher employment land provision (an above-trend position) can potentially help to support housing demand and delivery, and ensuring opportunities are created for residents to live locally. Equally population growth provided for by higher housing delivery can help to support economic growth.

4.39 **There is a strong justification in these terms for considering the higher employment land provision implied by the Labour Supply Scenario**. Whilst this is to be regarded as stretching target, the recent completions trend provides some evidence supporting the potential for higher employment land delivery. Decisions on this may however be influenced by elements of the wider evidence base, including the scale of housing provision which can be sustainable accommodated through the Local Plan.

5. Employment Land Requirements – Local Planning Authority Area and National Park

5.1 The table below presents an indicative breakdown of the Derbyshire Dales District employment land requirements by Local Planning Authority area (i.e. the plan area for the forthcoming Derbyshire Dales Local Plan) and National Park area. This has been taken forwards using the labour demand modelling and net absorption, reflecting the conclusions drawn in the previous section.

5.2 The margin has been assigned fully to the LPA given that there have been no completions within the Peak District area of the District over the last nine years of monitoring data.

5.3 The replacement demand figure for the National Park is assumed to be zero as there have been negligible losses in the Peak District area of the District over the last nine years of monitoring data.

5.4 The detailed methodology for calculating labour supply in the two areas is set out in Appendix A1. Particular consideration should be given to the labour supply scenario, with the two sensitivities modelled being:

- Scenario A: Meeting Plan-Area Housing Needs Only (i.e. delivery of 415 dpa); and
- Scenario B: Fully meeting District's needs, with Park Area delivering 50 dpa (i.e. delivery of 523 dpa in the plan area).[4]

5.5 The results are set out in the table below. **Stronger demographic growth is expected in the plan area than for the District as a whole, and this translates into the potential need for higher employment land provision to balance**

[4] See Table A2.1 for further details

homes and jobs – for between 42-53 ha, depending on the scenario considered.

Table 5.1 Breakdown of employment land requirements by area, 2024-2045 (ha)

	Local Planning Authority Area				National Park Area			
	Labour demand – OE Baseline Scenario	**Labour demand – OE Alternative Scenario**	**Labour Supply Scenario (A/B)**	**Net Absorption**	**Labour demand – OE Baseline Scenario**	**Labour demand – OE Alternative Scenario**	**Labour Supply Scenario (A/B)**	**Net Absorption**
Modelled need	-12.6	-2.0	29.5 / 40.5	7.5	-5.7	-1.0	-5.0 / -3.7	5.7
Future vacancy (7.5%)	0.1	0.1	2.2 / 3.0	0.6	0.0	0.0	0.0 / 0.0	0.4
5-year margin (gross completions)	4.0				0			
Replacement Demand (@50% losses)	5.9				0			
Total	**-2.6**	**8.0**	**41.6 / 53.4**	**12.1**	**-5.7**	**-1.0**	**-5.0 / -3.7**	**6.1**

A1. Demographic Trends and Projections

Introduction

A1.1 This section of the report considers overall housing need set against the NPPF and Planning Practice Guidance (PPG) – specifically the Standard Method for assessing housing need – a need for 573 dwellings per annum. The method used has been to develop a trend-based projection and then flex levels of migration to and from the District so there is a sufficient population to fill the suggested number of homes.

A1.2 The projections look at the 2024-45 period and initial analysis is for the District as a whole. This is then followed by smaller-area projections for the LPA and Plan area separately, set against the three scenarios previously developed. The analysis below starts with a review of local population trends.

Population

A1.3 As of mid-2023 (the latest date for which ONS has published mid-year population estimates (MYE)), the population of Derbyshire Dales is estimated to be 71,500; this is an increase of around 400 people over the previous decade (a 0.5% increase), which is significantly lower than seen across other areas, including a figure of 7% nationally.

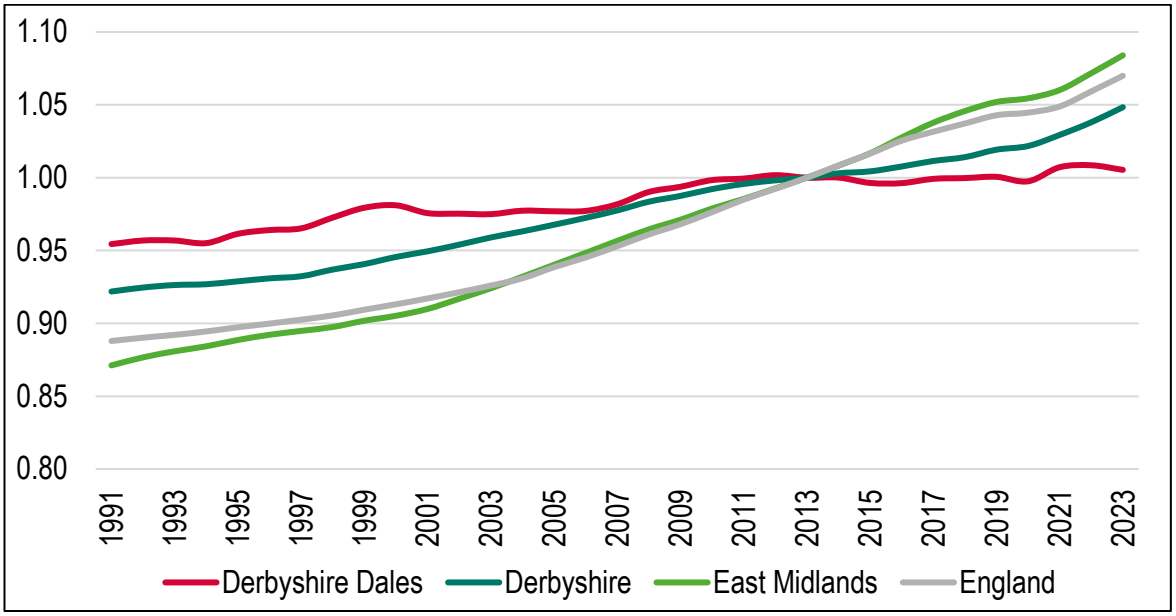
Table A1.1 Population change (2013-23)

	2013	2023	Change	% change
Derbyshire Dales	71,148	71,530	382	0.5%
Derbyshire	774,002	811,449	37,447	4.8%
East Midlands	4,604,568	4,991,265	386,697	8.4%
England	53,918,686	57,690,323	3,771,637	7.0%

Source: ONS

A1.4 The figure below shows an indexed population change back to 1991 (index to 1 in 2013). This shows population growth to have been slower than other areas studied throughout this period.

Figure A1.1: Indexed Population Change – 1991-2023

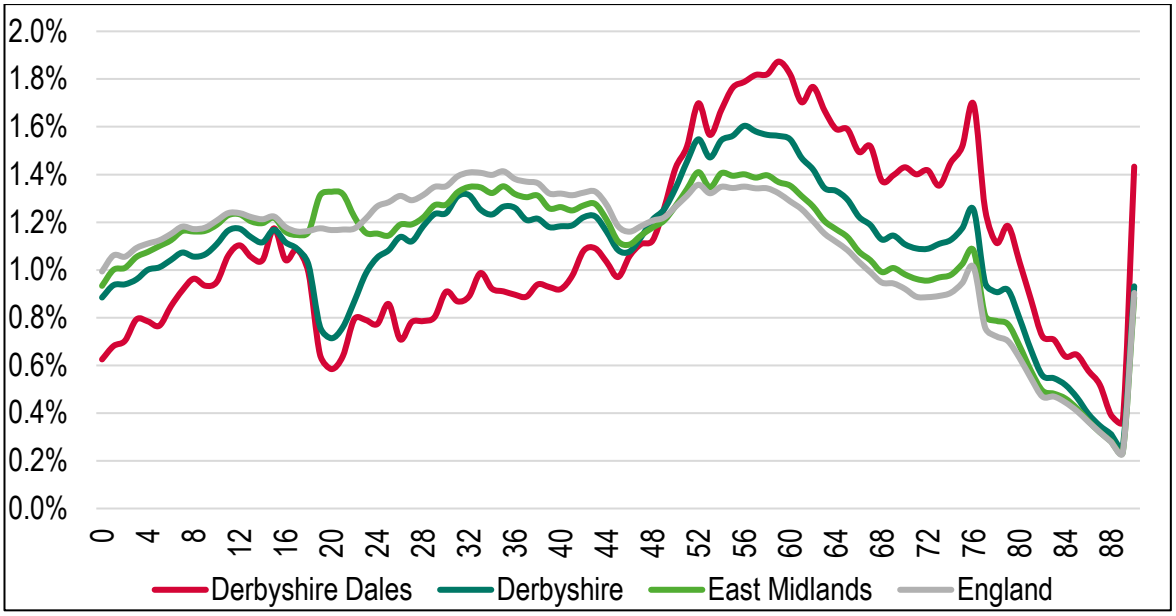


Source: ONS

Age Structure

A1.5 The figure below shows the age structure by single year of age (compared with a range of other areas). Overall, the population structure is much older than seen in other areas with higher proportions of the population in all age groups from about 50 onwards. The analysis also shows fewer children and a notably lower proportion of people in their late teens and early 20s – this observation will be linked to people moving away for further education.

Figure A1.2: Population profile (2023)



Source: ONS

A1.6 The analysis below summarises the above information (including total population numbers for Derbyshire Dales) by assigning population to three broad age groups (which can generally be described as a) children, b) working age and c) pensionable age). This analysis confirms the older age structure – showing 29% of the population as aged 65 and over (compared with just 19% nationally).

Table A1.2 Population profile (2023) – summary age bands

	Derbyshire Dales		Derbyshire	East Midlands	England
	Population	% of population	% of population	% of population	% of population
Under 16	10,295	14.4%	16.8%	18.1%	18.5%
16-64	40,429	56.5%	60.7%	62.2%	62.9%
65+	20,806	29.1%	22.5%	19.8%	18.7%
All Ages	71,530	100.0%	100.0%	100.0%	100.0%

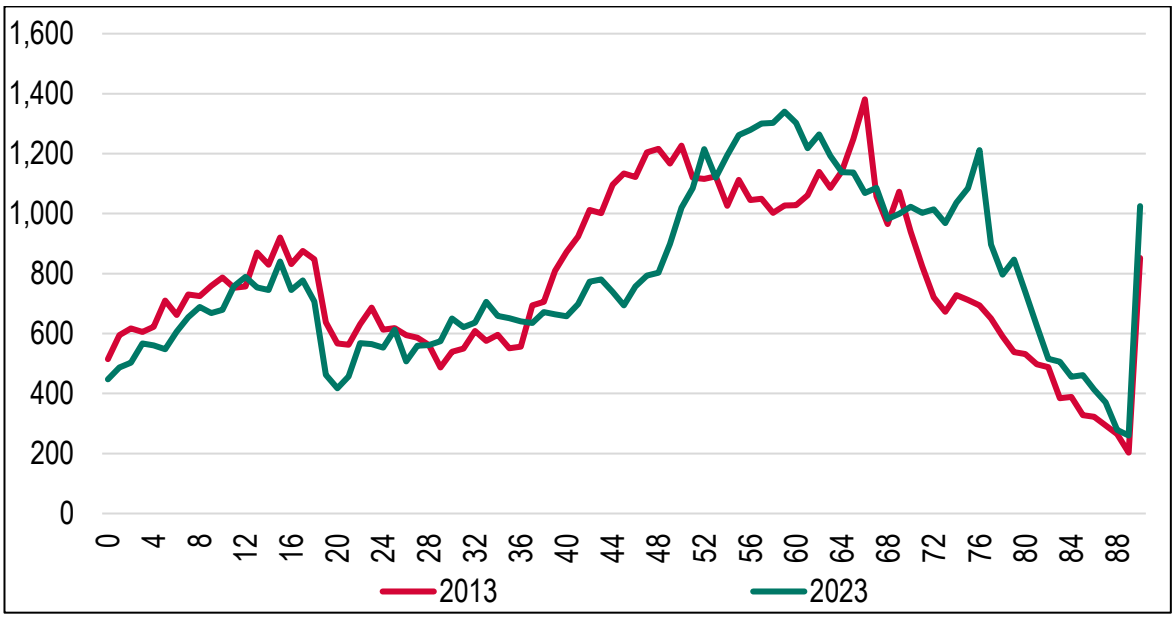
Source: ONS

Age Structure Changes

A1.7 The figure below shows how the age structure of the population has changed in the 10-year period from 2013 to 2023 – the data used is based on population so

will also reflect the modest increase seen in this period. There have been some changes in the age structure, including increases in the population in their 50s; the number of people aged 65 and over also looks to have increased notably. Where there are differences, it is often due to cohort effects (i.e. smaller or larger cohorts of the population getting older over time.

Figure A1.3: Population age structure (people) (2013 and 2023) – Derbyshire Dales



Source: ONS

A1.8 Again, the information above is summarised into the three broad age bands to ease comparison. This shows the significant ageing of the population and notable reductions in both the number of children and those aged 16-64.

Table A1.3 Change in population by broad age group (2013-23) – Derbyshire Dales

	2013	2023	Change	% change
Under 16	11,457	10,295	-1,162	-10.1%
16-64	42,340	40,429	-1,911	-4.5%
65+	17,351	20,806	3,455	19.9%
TOTAL	71,148	71,530	382	0.5%

Source: ONS

Components of Population Change

A1.9 The table below consider the drivers of population change from 2011 to 2023. The main components of change are natural change (births minus deaths) and net migration (internal/domestic and international). There is also an Unattributable Population Change (UPC) which is a correction made by ONS upon publication of Census data if population has been under or over-estimated (this is only calculated for the 2011-21 period). There are also 'other changes', which are variable (sometimes positive and sometime negative but generally balancing out over time) – these changes are often related to armed forces personnel, prisons or boarding school pupils.

A1.10 The data shows natural change to generally be dropping over time and there are now significantly more deaths than births in the District. Migration is variable, and always positive for internal (domestic) migration. For international net migration figures are much lower (generally negative); however, the last two years for which data is available shows a notably higher level of international migration than had been seen generally in the past – this being a consistent trend to that seen nationally.

A1.11 The analysis also shows (for the 2011-21) period a negative level of UPC (totalling around 600 people over the 10-year period), this suggests when the 2021 Census was published ONS had previously over-estimated population change. Overall, the data shows modest population changes in both a positive and negative direction throughout the period studied.

Table A1.4 Components of population change, mid-2011 to mid-2023 – Derbyshire Dales

	Natural change	Net internal migration	Net intern-ational migration	Other changes	Other (unattri-butable)	Total change
2011/12	-153	421	-54	7	-53	168
2012/13	-229	182	-40	20	-57	-124
2013/14	-273	340	-9	13	-65	6
2014/15	-333	300	-39	-135	-54	-261
2015/16	-313	327	-37	88	-75	-10
2016/17	-296	611	-72	50	-84	209
2017/18	-325	497	-60	14	-88	38
2018/19	-318	511	-61	5	-77	60
2019/20	-388	364	-60	-129	-5	-218
2020/21	-396	1,054	-53	100	-18	687
2021/22	-431	202	219	106	0	96
2022/23	-470	53	150	42	0	-225

Source: ONS

Developing a Trend-Based Projection

A1.12 The purpose of this section is to develop a trend-based population projection using the latest available demographic information – this projection then being used as a base to develop an alternative scenario linking to the Standard Method. A key driver for developing a new projection is due to publication of 2021 Census data which has essentially reset estimates of population (size and age structure) compared with previous mid-year population estimates (MYE) from ONS (ONS has subsequently updated 2021 MYE figures to take account of the Census). In addition, as referenced above, a 2023 MYE is now available.

A1.13 The projection developed looks at estimated migration trends over the past 5-years with this period being used as it is consistent with the time period typically used by ONS when developing subnational population projections.

A1.14 Below, the general method used for each of the components and the outputs from the trend-based projection is set out. The population projection uses the framework of ONS subnational population projections (SNPP) as a start point. This means considering data on births, deaths and migration. The most recent ONS projections are 2018-based and therefore quite out-of-date, given there are now population estimates and components of change data up to 2023. The 2018-based projections are however used as a start point from which up-to-date projections can be developed.

Natural Change

A1.15 Natural change is made up of births and deaths and the analysis above has shown a general downward trend over time. To project trends forward, the analysis looks at each of births and deaths separately and compares projected figures in the 2018-SNPP with actual recorded figures in the MYE.

A1.16 The analysis also takes account of differences between the estimated population size and structure in the 2018-SNPP compared with ONS MYE (up to 2023). Overall, it is estimated recent trends in fertility are slightly lower (around 4% lower than projected in 2018) and mortality rates are slightly higher (1% higher) when compared with data in the 2018-SNPP and so adjustments have been made on this basis.

Migration

A1.17 The migration analysis looks separately at each of in- and out-migration and for internal and international migration – all data being considered by sex and single year of age. Trend based projections do not typically simply project trends forward and can vary year by year, in part relating to how the population of other areas is projected to change. The approach used is to look at migration trends in the 2018-23 period and compare these with figures projected back in the 2018-SNPP for the same period. Adjustments are then be made to migration numbers to provide a best estimate of a future projection based on recent trends. This method will

provide a realistic view of projected migration in the absence of being able to develop a full matrix of moves at a national level (as ONS would do).

Population Projection Outputs

A1.18 The estimates of fertility, mortality and migration (including changes over time) have been modelled to develop a projection for the period to 2045 (the end of the plan period). The projection outputs start from 2024, but as we only have ONS estimates to 2023 the data to get from 2023 to 2024 is also projected (on this trend-based position). The table below shows overall projected population growth of around 4,900 people – a 7% increase from 2024 levels.

Table A1.5 Projected population growth under a trend-based scenario – Derbyshire Dales (2024-45)

	Population 2024	Population 2045	Change	% change
5-year trend	71,639	76,563	4,925	6.9%

Source: Iceni analysis

Household Projections

A1.19 To understand what this means for housing need the population growth is translated into household growth using household representative rates and data about the communal (institutional) population. These have again been updated using data from the Census with the table below summarising the assumptions used.

A1.20 For the communal population, it is assumed actual numbers are held constant up to ages under 75, with the proportion of the population being used for 75+ age groups – this approach is consistent with typical ONS projections.

A1.21 In interpreting the table below (by way of examples) the data shows around 7.6% of females aged 85-89 live in communal establishments (i.e. are not part of the

household population) whilst around 76% of males aged 50-54 are considered to be a 'head of household' (where they are living in a household).

A1.22 Generally the HRRs increase by age, this is due to older people being more likely to live alone, often following the death of a spouse or partner.

Table A1.6 Communal Population and Household Representative Rates from 2021 Census – Derbyshire Dales

Age	Communal population		Household Representative Rates	
	Male	Female	Male	Female
0 to 15	19	25	-	-
16 to 19	27	22	0.013	0.014
20 to 24	54	11	0.153	0.113
25 to 29	89	6	0.387	0.257
30 to 34	102	10	0.625	0.318
35 to 39	67	4	0.728	0.325
40 to 44	56	6	0.757	0.355
45 to 49	48	1	0.754	0.398
50 to 54	37	4	0.764	0.399
55 to 59	28	8	0.782	0.424
60 to 64	22	6	0.744	0.454
65 to 69	13	10	0.706	0.435
70 to 74	16	11	0.742	0.460
75 to 79	0.010	0.012	0.837	0.524
80 to 84	0.028	0.031	0.876	0.651
85 to 89	0.033	0.076	0.896	0.787
90 or over	0.133	0.233	0.938	0.896

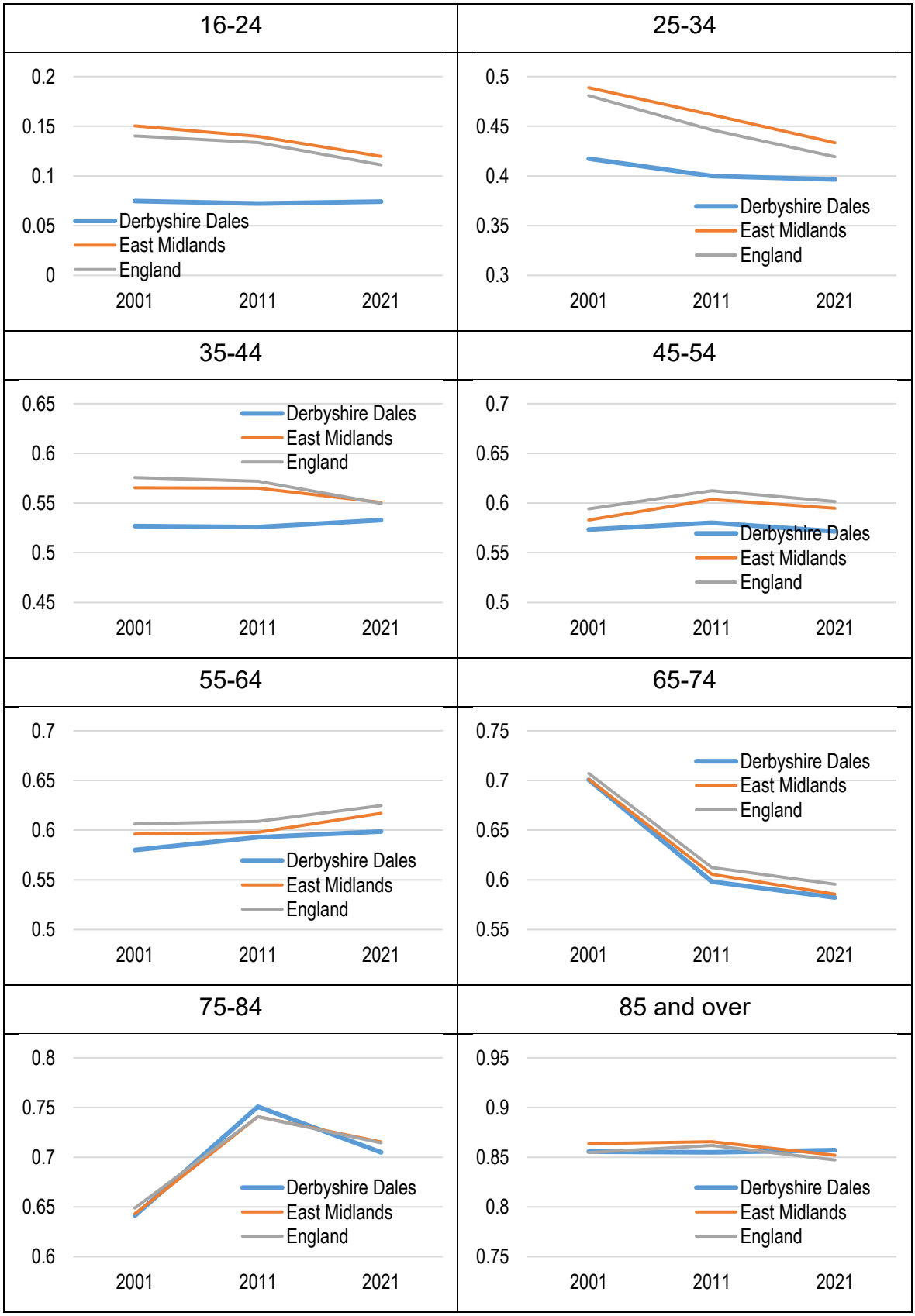
Source: Derived from Census 2021 (mainly Tables CT 106 and 107)

A1.23 For household representative rates (HRRs) the figures are calculated at the time of the Census. If ONS follow the method used in their most recent projections for future releases then they are likely to build in the trend between the last three Census points (2001, 2011 and 2021). The figure below shows a summary analysis of the changes in HRRs by age.

A1.24 Arguably the key groups to look at are younger age groups where there may have been a degree of suppression in household formation (due to affordability) although this does not appear to be the case in Derbyshire Dales. Whilst there appears to have been some reduction in the 25-34 age group, this is very modest in a regional and national context. For the 16-24 and 35-44 age groups the HRRs have actually increased slightly since 1991.

A1.25 For some older age groups there does also appear to be a trend of increasing or decreasing HRRs – particularly the 65-74 and 75-84 age groups (and mainly in the 2001-11 period). For these age groups it is considered that the 'trends' are more likely to be due to cohort effects rather than any trend that should be modelled moving forward.

Figure A1.4: Change in household representative rates by age 2001-21



Source: ONS

A1.26 Given the evidence above, the approach to HRRs taken in this report is to hold figures constant at the levels shown in the 2021 Census. Applying the HRRs to the trend-based population projection shows a projected increase of 3,300 households over the 2024-45 period, at an average of 158 per annum.

Table A1.7 Projected change in households – trend-based – Derbyshire Dales

	Households 2024	Households 2045	Change in households	Per annum
5-year trend	32,792	36,105	3,312	158

Source: Iceni analysis

Developing a Projection linking to the Standard Method

A1.27 As well as developing a trend-based projection it is possible to consider the implications of housing delivery in line with the Standard Method. The analysis below looks at how the population might change if providing this level of homes occurs. This is 573 dwellings per annum (at the time of preparation of this report in Spring 2025).[5] A scenario has been developed which flexes migration to and from the District such that there is sufficient population for this level of additional homes to be filled each year.

A1.28 Within the modelling, migration assumptions have been changed so that across the District the increase in households matches the housing need (including a standard 3% vacancy allowance). Adjustments are made to both in- and out-migration (e.g. if in-migration is increased by 1% then out-migration is reduced by 1%).

A1.29 This approach is consistent with the Planning Practice Guidance (PPG) as revised in December 2024, alongside the new Standard Method which provides some

[5] As at early March 2026, the standard method figure is 575 dpa however this is not considered to be materially different and would therefore not substantively change the implications of the modelling undertaken.

indication of why the Government sees a need to increase housing delivery[6]. Paragraph 006 (Reference ID: 2a-006-20241212) states:

'Why is an affordability adjustment applied?

An affordability adjustment is applied as housing stock on its own is insufficient as an indicator of future housing need because:

- *housing stock represents existing patterns of housing and means that all areas contribute to meeting housing needs. The affordability adjustment directs more homes to where they are most needed*

- *people may want to live in an area in which they do not reside currently, for example to be near to work, but be unable to find appropriate accommodation that they can afford.*

The affordability adjustment is applied in order to ensure that the standard method for assessing local housing need responds to price signals and is consistent with the policy objective of significantly boosting the supply of homes. The specific adjustment in this guidance is set at a level to ensure that minimum annual housing need starts to address the affordability of homes.'

A1.30 Essentially, the Government considers that by providing more homes there is the opportunity for increased migration to an area to fill the homes whilst equally, one of Government's core objectives in planning for the delivery of 370,000 homes a year nationally is to improve affordability.

A1.31 In developing this projection a population increase of around 25,700 people is shown – a 36% increase and substantially higher than the trend-based projection (which is shown in the table below for context).

[6] https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments

Table A1.8 Projected population growth under a range of scenarios – Derbyshire Dales (2024-45)

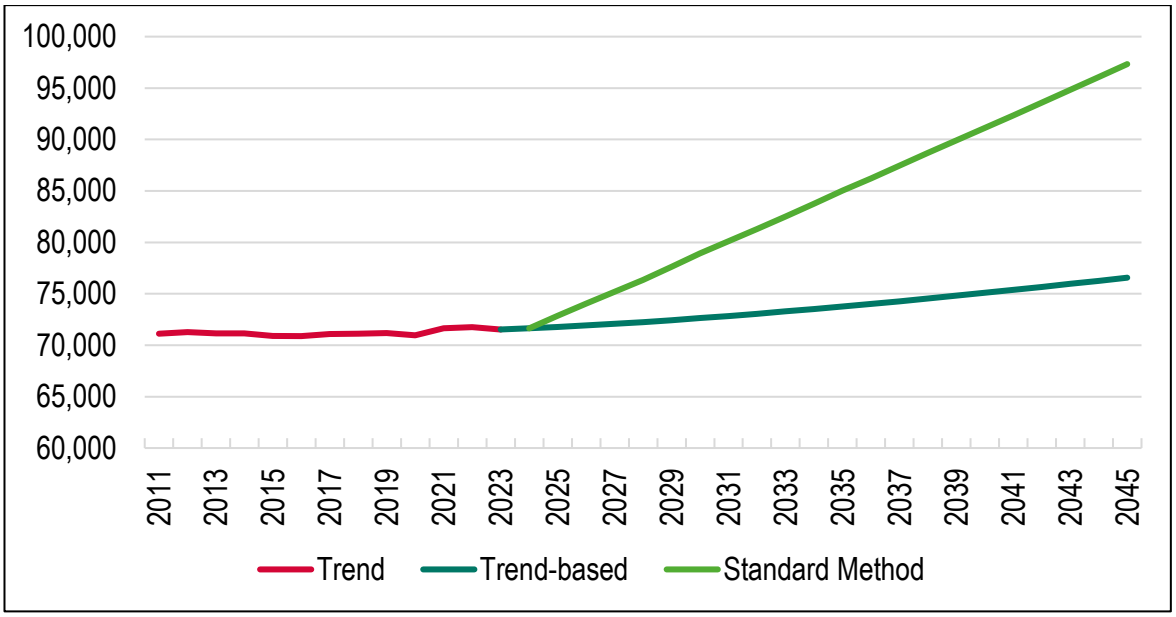
	Population 2024	Population 2045	Change	% change
5-year trend	71,639	76,563	4,925	6.9%
Standard Method	71,639	97,327	25,688	35.9%

Source: Iceni analysis

A1.32 Below are a series of charts showing past trends and projected population growth and key components of change for each of the projections developed. The first figure looks at overall population growth, before considering natural change and net migration.

A1.33 The analysis suggests the population of Derbyshire Dales could rise to 97,300 by 2045 (up from 71,639 in 2024 (estimated)) a 36% increase, or 1.7% per annum. For comparison, between 2013 and 2023 the population increased by an average of around 0.1% per annum and so the Standard Method would be projected to provide a significant boost in population growth.

Figure A1.5: Past trends and projected population – Derbyshire Dales



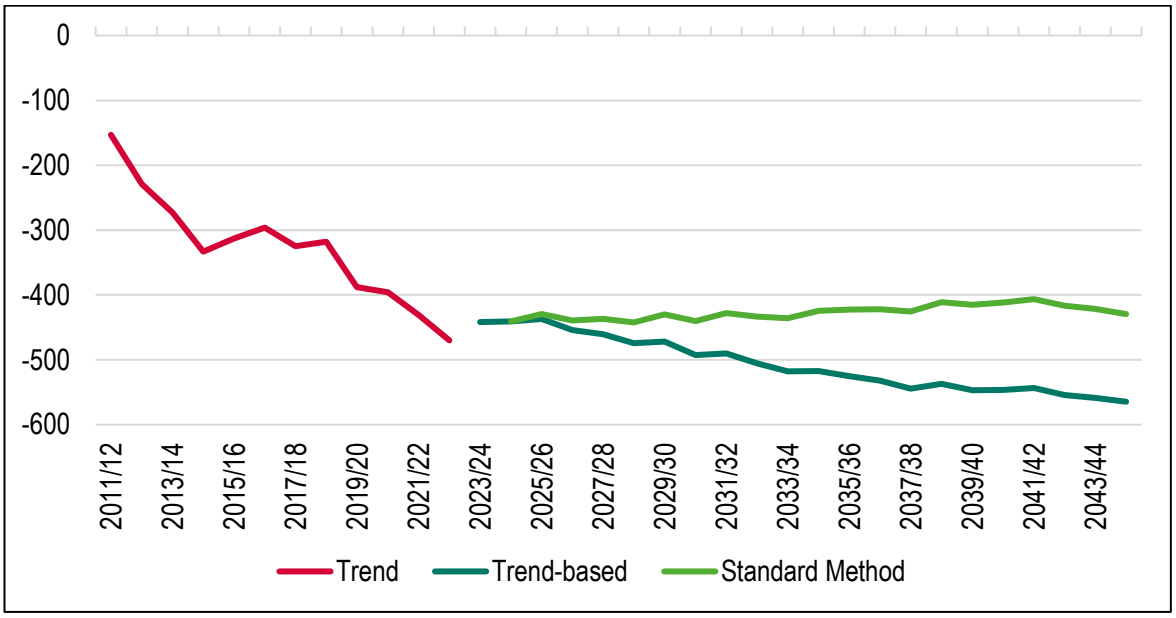
Source: ONS and Iceni analysis

A1.34 The main reason for the higher population growth would be due to increased net in-migration, although the decline in natural change (births minus deaths) would

also be projected to flatten off or reverse as the population rises (as there will be more females of child-bearing age).

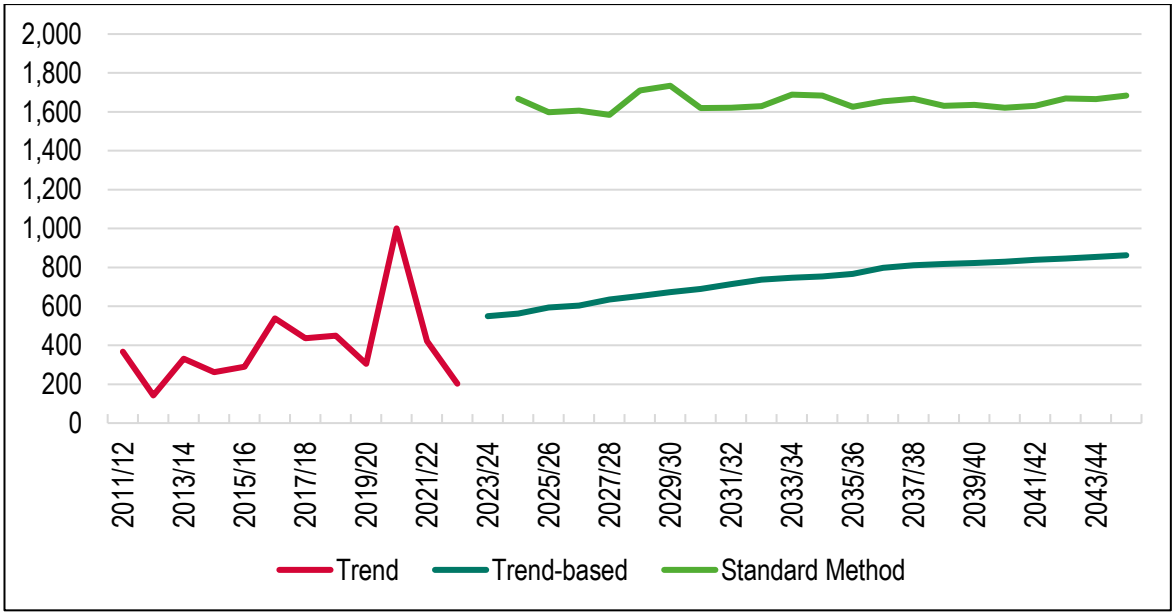
A1.35 The figures below show projected natural change and net migration under the scenarios. Focussing on net migration, the analysis suggests that with higher delivery linked to the Standard Method net migration would be at a level higher than typical past trends – indeed every year is project to see migration above the figure for any single year dating back to at least 2011.

Figure A1.5: Past trends and projected natural change – Derbyshire Dales



Source: ONS and Iceni analysis

Figure A1.6: Past trends and projected net migration – Derbyshire Dales



Source: ONS and Iceni analysis

A1.36 A final analysis compares age structure changes under each of these projections. In both cases the projections show an ageing of the population and that with higher growth there would be higher increases in the number of children and people of 'working-age' (16-64).

Table A1.9 Projected population change 2024 to 2045 by broad age bands – trend-based – Derbyshire Dales

	2024	2045	Change in population	% change
Under 16	10,130	10,324	193	1.9%
16-64	40,381	38,839	-1,542	-3.8%
65 and over	21,127	27,400	6,273	29.7%
Total	71,639	76,563	4,925	6.9%

Source: Iceni analysis

Table A1.10 Projected population change 2024 to 2045 by broad age bands – Standard Method – Derbyshire Dales

	2024	2045	Change in population	% change
Under 16	10,130	14,407	4,277	42.2%
16-64	40,381	51,774	11,392	28.2%
65 and over	21,127	31,146	10,020	47.4%
Total	71,639	97,327	25,688	35.9%

Source: Iceni analysis

Relationship Between Housing and Economic Growth

A1.37 The analysis to follow considers the relationship between housing and economic growth; seeking to understand what level of jobs might be supported by changes to the local labour supply (which will be influenced by population change). To look at estimates of the job growth to be supported, a series of stages are undertaken. These can be summarised as:

- Estimate changes to the economically active population (this provides an estimate of the change in labour-supply);
- Overlay information about commuting patterns, double jobbing (i.e. the fact that some people have more than one job) and potential changes to unemployment; and
- Bringing together this information will provide an estimate of the potential job growth supported by the population projections.

Growth in Resident Labour Supply

A1.38 The approach taken in this report is to derive a series of age and sex specific economic activity rates and use these to estimate how many people in the population will be economically active as projections develop. This is a fairly typical approach with data being drawn in this instance from the Office for Budget

Responsibility (OBR) – July 2018 (Fiscal Sustainability Report) – this data has then been rebased to information in the 2021 Census (on age, sex and economic activity).

A1.39 The table below shows the assumptions made for the District. The analysis shows that the main changes to economic activity rates are projected to be in the 60-69 age groups – this will to a considerable degree link to changes to pensionable age, as well as general trends in the number of older people working for longer (which in itself is linked to general reductions in pension provision).

Table A1.11 Projected changes to economic activity rates (2024 and 2045) – Derbyshire Dales

	Males			Females		
	2024	2045	Change	2024	2045	Change
16-19	40.6%	41.1%	0.5%	39.6%	40.0%	0.4%
20-24	82.0%	82.1%	0.0%	80.8%	80.8%	0.0%
25-29	87.0%	87.0%	0.0%	84.4%	84.4%	0.0%
30-34	89.0%	89.0%	0.0%	84.8%	84.8%	0.0%
35-39	89.9%	89.7%	-0.2%	84.5%	85.4%	0.9%
40-44	90.6%	89.7%	-0.9%	86.3%	88.4%	2.1%
45-49	91.5%	90.3%	-1.2%	84.7%	88.2%	3.5%
50-54	88.9%	88.1%	-0.8%	81.0%	85.1%	4.1%
55-59	82.8%	82.0%	-0.8%	70.5%	73.7%	3.2%
60-64	66.5%	70.5%	4.1%	55.5%	61.3%	5.9%
65-69	34.1%	47.5%	13.4%	26.2%	39.7%	13.6%
70-74	15.4%	19.0%	3.6%	8.9%	15.8%	6.9%
75-89	8.1%	8.5%	0.4%	3.5%	6.2%	2.7%

Source: Based on OBR and Census (2021) data

A1.40 In addition, a sensitivity has been developed where the EARs are held constant at 2021 levels. It is considered the sensitivity is reasonable given data (including from the Census) has shown activity rates to have not grown as they had previously been forecast to do.

A1.41 Working through an analysis of age and sex specific economic activity rates it is possible to estimate the overall change in the number of economically active people in the area – this is set out in the table below (linking to the 5-year trend based projections and the Standard Method).

A1.42 The analysis shows that a trend-based projection results in growth in the economically-active population of up to 1,400 people – a 4% increase. With the Standard Method the increase in the economically active population is projected to be up to 12,600 (a 37% increase).

Table A1.12 Estimated change to the economically active population (2024-45) – Derbyshire Dales

		Econom-ically active (2024)	Econom-ically active (2045)	Total change in econom-ically active	% change
Trend-based	OBR EAR	34,041	35,399	1,359	4.0%
	EAR no change	33,647	33,141	-506	-1.5%
Standard Method	OBR EAR	34,041	46,690	12,649	37.2%
	EAR no change	33,647	44,057	10,410	30.9%

Source: Iceni Analysis

Linking Changes in Resident Labour Supply to Job Growth

A1.43 The analysis above has set out potential scenarios for the change in the number of people who are economically active. However, it is arguably more useful to convert this information into an estimate of the number of jobs this would support. The number of jobs and resident workers required to support these jobs will differ depending on three main factors:

- Commuting patterns – where an area sees more people out-commute for work than in-commute it may be the case that a higher level of increase in the economically active population would be required to provide a sufficient workforce for a given number of jobs (and vice versa where there is net in-commuting);

- Double jobbing – some people hold down more than one job and therefore the number of workers required will be slightly lower than the number of jobs; and

- Unemployment – if unemployment were to fall then the growth in the economically active population would not need to be as large as the growth in jobs (and vice versa).

Commuting Patterns

A1.44 The table below shows summary data about commuting to and from Derbyshire Dales from the 2011 and 2021 Census. Data from both sources is used as the 2011 data is quite old, but the 2021 data could be influenced by the COVID-19 pandemic.

A1.45 Overall, from both sources the data shows a level of net in-commuting (around 3% more people working in the District than live in the District and are working in 2011 (a higher figure of 6% in 2021)). This is shown as the commuting ratio in the final row of the table and is calculated as the number of people living in the area (and working) divided by the number of people working in the area (regardless of where they live).

A1.46 When comparing the two sources it is worth reflecting on a large increase in the number of home workers (or those of no fixed workplace) in 2021 compared with 2011. In 2011, a total of 9,300 people were recorded as home workers or with no fixed workplace; in 2021 this figure had nearly doubled (to 16,200). As the country has moved away from the pandemic, it is possible this figure has started to reduce slightly with possible implications on commuting dynamics.

Table A1.13 Commuting Patterns – Derbyshire Dales

	2011	2021
Live and Work in District	14,107	8,996
Home Workers or No Fixed Workplace	9,278	16,208
In Commute	13,172	10,070
Out Commute	11,969	8,024
Total Working in LA	36,557	35,274
Total Living in LA and Working Anywhere	35,354	33,228
Commuting Ratio	0.967	0.942

Source: Census 2011, 2021

A1.47 The analysis below looks at both sets of Census data with a further sensitivity of a balanced (1:1) commuting ratio (i.e. the increase in the number of people working in the area is equal to the number of people living in the area who are working).

Double Jobbing

A1.48 The analysis also considers that a number of people may have more than one job (double jobbing). This can be calculated as the number of people working in the local authority divided by the number of jobs. Data from the Annual Population Survey (available on the NOMIS website) for the past 5-years (for which data exists) suggests across Derbyshire Dales that typically about 7.5% of workers have a second job. It has therefore been assumed that around 7.5% of people will have more than one job moving forward – this means the number of jobs supported by the workforce will be around 7.5% higher than workforce growth. It has been assumed in the analysis that the level of double jobbing will remain constant over time.

Unemployment

A1.49 The last analysis when looking at the link between jobs and resident labour supply is a consideration of unemployment. Essentially, this is considering if there is any latent labour force that could move back into employment to take up new jobs. The latest model-based unemployment data from the Annual Population Survey (for January 2024-December 2024) puts unemployment at around 3.1% which is a level that might be considered as full employment (noting there will always be some level of unemployment as people enter the labour market or move between jobs). No further adjustment is made to the data to take account of unemployment.

Jobs Supported by Growth in the Resident Labour Force

5.6 The tables below show how many additional jobs might be supported by population growth under the different projection scenarios. It is estimated under the Standard Method that up to 14,500 additional jobs could be supported by the changes to the resident labour supply over the 2024-45 period.

Table A1.1 Jobs supported by demographic projections (2024-45) – Derbyshire Dales – 5-year trends

		Total change in economically active	Allowance for double jobbing	Allowance for net commuting (= jobs supported)
OBR EAR	2021 commuting	1,359	1,469	1,559
	2011 commuting	1,359	1,469	1,519
	1:1 commuting	1,359	1,469	1,469
EAR no change	2021 commuting	-506	-547	-581
	2011 commuting	-506	-547	-566
	1:1 commuting	-506	-547	-547

Source: Iceni analysis

Table A1.2 Jobs supported by demographic projections (2024-45) – Derbyshire Dales – Standard Method

		Total change in economically active	Allowance for double jobbing	Allowance for net commuting (= jobs supported)
OBR EAR	2021 commuting	12,649	13,675	14,517
	2011 commuting	12,649	13,675	14,140
	1:1 commuting	12,649	13,675	13,675
EAR no change	2021 commuting	10,410	11,254	11,947
	2011 commuting	10,410	11,254	11,637
	1:1 commuting	10,410	11,254	11,254

Source: Iceni analysis

A2. Projections for the LPA and National Park

Introduction

A2.1 The analysis below seeks to develop projections in the same way as for the District as a whole but split between the Local Planning Authority (LPA) area and the National Park (where this sits withing Derbyshire Dales District). The projections link to the different housing numbers previously set out in this report and are summarised in the table below (all set out as dwelling per annum figures which are again projected for the 2024-45 period).

Table A2.1 Projection scenarios developed for Derbyshire Dales

Scenario	LPA	National Park	TOTAL
Scenario A – Meeting Plan Area Needs Only	415	40	455
Scenario B – Fully Meeting Needs with Park Area delivering 50 dpa	523	50	573
Scenario C – Fully Meeting Needs with Park Area delivering 100 dpa	473	100	573

Source: Iceni analysis

Population trends

A2.2 As of mid-2022 (the latest date for which ONS has published mid-year population estimates (MYE) for smaller-areas), the population of the LPA is estimated to be 48,800 with 22,900 people living in the National Park (within the District). For the LPA the figure represents a 4% increase over the previous decade, whilst the Park has seen a notable (5%) decline in population.

Table A2.2 Population change (2012-22)

	2012	2022	Change	% change
LPA	47,166	48,844	1,678	3.6%
National Park	24,106	22,911	-1,195	-5.0%
Total	71,272	71,755	483	0.7%

Source: ONS

Age Structure

A2.3 The table below shows the age structure in each area in three broad age groups. This shows an older age structure in the National Park, with 32% of the population being aged 65 and over; there are also fewer children in this area.

Table A2.3 Population profile (2022) – summary age bands

	LPA		National Park		Total	
	Pop.	% of pop.	Pop.	% of pop.	Pop.	% of pop.
Under 16	7,312	15.0%	3,071	13.4%	10,383	14.5%
16-64	28,294	57.9%	12,611	55.0%	40,905	57.0%
65+	13,238	27.1%	7,229	31.6%	20,467	28.5%
All Ages	48,844	100.0%	22,911	100.0%	71,755	100.0%

Source: ONS

Age Structure Changes

A2.4 The tables below show how the age structure of the population has changed in the 10-year period from 2012 to 2022. The analysis shows an ageing population in both areas although the increase in the proportion of people aged 65 and over is lower in the National Park than the LPA. That said, the Park area has seen a far more significant decline in the number of people aged 16-64 (down 10% over the decade) and children (down 17%).

Table A2.4 Change in population by broad age group (2012-22) – Derbyshire Dales LPA

	2012	2022	Change	% change
Under 16	7,929	7,312	-617	-7.8%
16-64	28,827	28,294	-533	-1.8%
65+	10,410	13,238	2,828	27.2%
TOTAL	47,166	48,844	1,678	3.6%

Source: ONS

Table A2.5 Change in population by broad age group (2012-22) – National Park in Derbyshire Dales

	2012	2022	Change	% change
Under 16	3,711	3,071	-640	-17.2%
16-64	14,064	12,611	-1,453	-10.3%
65+	6,331	7,229	898	14.2%
TOTAL	24,106	22,911	-1,195	-5.0%

Source: ONS

Projections Developed

A2.5 The tables below provide projected population change and age structure changes (in broad age bands) under each of the scenarios set out above. The first three tables look at the scenarios for thew LPA and then three tables with data for the National Park (within Derbyshire Dales).

A2.6 With provisions of 415 dwellings per annum (8,715 in total over the 2024-45 period) the population of the LPA is projected to increase by 18,800 people (a 39% increase from 2024). There are projected to be significant increases in all broad age groups. If the housing number in increased to 523 dwellings per annum (10,983 in total) the population projection is somewhat higher (24,300 additional people – a 50% increase from 2024 levels). The higher housing number see higher relative growth being projected for younger age groups (including children).

Table A2.6 Projected population change 2024 to 2045 by broad age bands – Standard Method – Derbyshire Dales LPA – 415 dwellings per annum

	2024	2045	Change in population	% change
Under 16	7,131	10,348	3,217	45.1%
16-64	27,907	36,847	8,940	32.0%
65 and over	13,668	20,334	6,666	48.8%
Total	48,705	67,528	18,823	38.6%

Source: Iceni analysis

Table A2.7 Projected population change 2024 to 2045 by broad age bands – Standard Method – Derbyshire Dales LPA – 523 dwellings per annum

	2024	2045	Change in population	% change
Under 16	7,131	11,419	4,288	60.1%
16-64	27,907	40,306	12,399	44.4%
65 and over	13,668	21,244	7,576	55.4%
Total	48,705	72,969	24,263	49.8%

Source: Iceni analysis

Table A2.8 Projected population change 2024 to 2045 by broad age bands – Standard Method – Derbyshire Dales LPA – 473 dwellings per annum

	2024	2045	Change in population	% change
Under 16	7,131	10,923	3,792	53.2%
16-64	27,907	38,704	10,798	38.7%
65 and over	13,668	20,823	7,155	52.3%
Total	48,705	70,450	21,745	44.6%

Source: Iceni analysis

A2.7 In the National Park all the scenarios show much lower projected levels of population growth. With provision of 40 dwellings per annum (840 homes over the 21-year period) the population is projected to increase by around 830 people (a 4% increase); within this there is projected to be a notable ageing of the population and reductions in the number of people aged Under 16 and 16-64. With 50 dwellings per annum, population growth is stronger, but there are still reductions in age groups under 65. Finally, with delivery of 100 dwellings per annum there is

projected to be stronger population growth (3,900 additional people, a 17% increase); this projection does also see a positive change in all broad age groups.

Table A2.9 Projected population change 2024 to 2045 by broad age bands – Standard Method – National Park (within Derbyshire Dales) – 40 dwellings per annum

	2024	2045	Change in population	% change
Under 16	3,000	2,885	-115	-3.8%
16-64	12,475	11,382	-1,092	-8.8%
65 and over	7,459	9,497	2,038	27.3%
Total	22,933	23,765	831	3.6%

Source: Iceni analysis

Table A2.10 Projected population change 2024 to 2045 by broad age bands – Standard Method – National Park (within Derbyshire Dales) – 50 dwellings per annum

	2024	2045	Change in population	% change
Under 16	3,000	2,979	-21	-0.7%
16-64	12,475	11,689	-786	-6.3%
65 and over	7,459	9,602	2,143	28.7%
Total	22,933	24,270	1,336	5.8%

Source: Iceni analysis

Table A2.11 Projected population change 2024 to 2045 by broad age bands – Standard Method – National Park (within Derbyshire Dales) – 100 dwellings per annum

	2024	2045	Change in population	% change
Under 16	3,000	3,447	447	14.9%
16-64	12,475	13,219	745	6.0%
65 and over	7,459	10,126	2,667	35.8%
Total	22,933	26,793	3,859	16.8%

Source: Iceni analysis

A2.8 The final analysis is to project changes to the economically active population under each of the scenarios, with the first table below showing data for the LPA. This shows a projected increase of up to 12,500 economically active people over the period; even the lowest projected figure shows an increase of over 8,000 people. In the Park the figures are much lower (including some negative changes) when looking at the 40 and 50 dwelling per annum scenarios.

Table A2.12 Estimated change to the economically active population (2024-45) – Derbyshire Dales LPA

		Economically active (2024)	Economically active (2045)	Total change in economically active	% change
415 dpa	OBR EAR	23,330	32,821	9,491	40.7%
	EAR no change	23,076	31,090	8,014	34.7%
523 dpa	OBR EAR	23,330	35,812	12,482	53.5%
	EAR no change	23,076	33,989	10,913	47.3%
473 dpa	OBR EAR	23,330	34,427	11,097	47.6%
	EAR no change	23,076	32,647	9,571	41.5%

Source: Iceni Analysis

Table A2.13 Estimated change to the economically active population (2024-45) – National Park (within Derbyshire Dales)

		Economically active (2024)	Economically active (2045)	Total change in economically active	% change
40 dpa	OBR EAR	10,710	10,683	-27	-0.3%
	EAR no change	10,571	9,910	-662	-6.3%
50 dpa	OBR EAR	10,710	10,956	245	2.3%
	EAR no change	10,571	10,172	-399	-3.8%
100 dpa	OBR EAR	10,710	12,319	1,609	15.0%
	EAR no change	10,571	11,484	912	8.6%

Source: Iceni Analysis