



GL Hearn

Part of Capita plc

Derby Housing Market Area

Implications of 2014-based Subnational Population Projections

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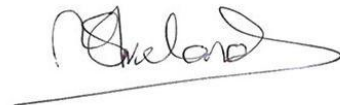
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1. INTRODUCTION

- 1.1 The latest set of (2014-based) subnational population projections (SNPP) were published by the Office for National Statistics (ONS) on the 25th May 2016. They replace the 2012-based projections. Subnational population projections provide estimates of the future population of local authorities, assuming a continuation of recent local trends in fertility, mortality and migration which are constrained to the assumptions made for the 2014-based national population projections.
- 1.2 They are not forecasts and do not attempt to predict the impact that future government or local policies, changing economic circumstances or other factors might have on demographic behaviour. The primary purpose of the subnational projections is to provide an estimate of the future size and age structure of the population of local authorities in England. These are used as a common framework for informing local-level policy and planning in a number of different fields as they are produced in a consistent way.
- 1.3 This document seeks to take forward the 2014-based SNPP to study the likely implications for household growth and housing needs in the Derby Housing Market Area (HMA) – made up of Amber Valley, Derby City and South Derbyshire. Government Planning Practice Guidance (PPG) on Housing and Economic Development Needs Assessment is clear that latest projections should be the start point for assessing overall housing need.
- 1.4 The analysis in this report uses the 2014-based projections to estimate household growth and hence housing need by using key assumptions about household formation (headship) rates from the 2012-based household projections. The analysis looks at the period from 2011-28 to be consistent with evidence currently supporting emerging HMA Local Plans. Part 1 of South Derbyshire's local plan is expected to be adopted by the Council on Monday 13 June 2016.
- 1.5 The report is split into a number of sections considering a range of different outputs related to the new projections. These are summarised below:
- Overall Population Growth
 - Components of Population Growth
 - Age Structure Changes
 - Household Growth Projections
 - Dwelling Requirements

2 OVERALL POPULATION GROWTH

2.1 The table below shows projected population growth from 2011 to 2028 in the HMA and a range of other areas. The data shows that the population of the Derby HMA is projected to grow by around 53,100 people; this is an 11.4% increase – very slightly lower than the projected increase in the region and also below the level projected for England. Population growth is projected to be particularly strong (in percentage terms) in South Derbyshire, and weaker in Amber Valley.

Table 1: Projected Population Growth (2011-28) – 2014-based SNPP

	Population 2011	Population 2028	Change in population	% change
Amber Valley	122,521	132,395	9,874	8.1%
Derby City	248,943	275,802	26,859	10.8%
South Derbyshire	94,915	111,326	16,411	17.3%
Derby HMA	466,379	519,523	53,144	11.4%
East Midlands	4,537,448	5,069,041	531,593	11.7%
England	53,107,169	59,844,386	6,737,217	12.7%

Source: ONS

2.2 It is also possible to compare the 2014-based SNPP with the last full set of projections (a 2012-based SNPP). This is shown (just for the HMA authorities) in the table below. This shows that the latest projections show a slightly lower level of population growth (2,700 people fewer – about 5% lower growth). The difference is almost entirely attributable to changes in Derby City, with only very modest differences in Amber Valley and South Derbyshire.

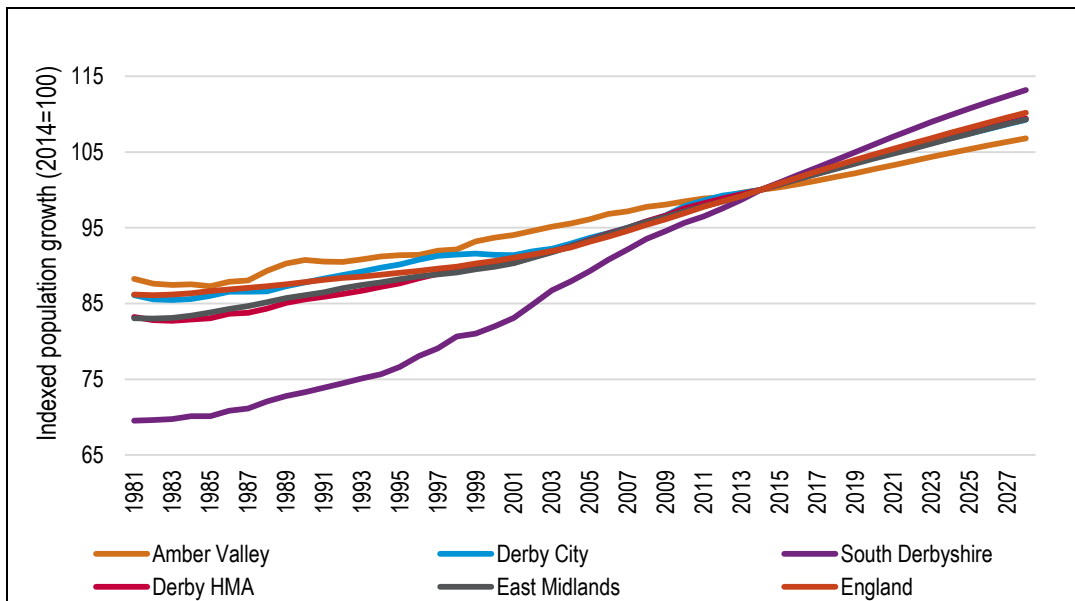
Table 2: Projected Population Growth (2011-28) – comparing projection releases

	2012-based SNPP	2014-based SNPP	Difference
Amber Valley	9,978	9,874	-104
Derby City	29,135	26,859	-2,276
South Derbyshire	16,684	16,411	-273
Derby HMA	55,797	53,144	-2,653

Source: ONS

2.3 The figure below shows past and projected population growth in the period 1981 to 2028; figures have been indexed to 100 for 2014. The data shows over the period from 1981 to 2014 that population growth in the Derby HMA has broadly followed trends in other areas. When looking at the individual local authorities it is clear that South Derbyshire stands out, with strong growth in the past which is projected to continue in the future.

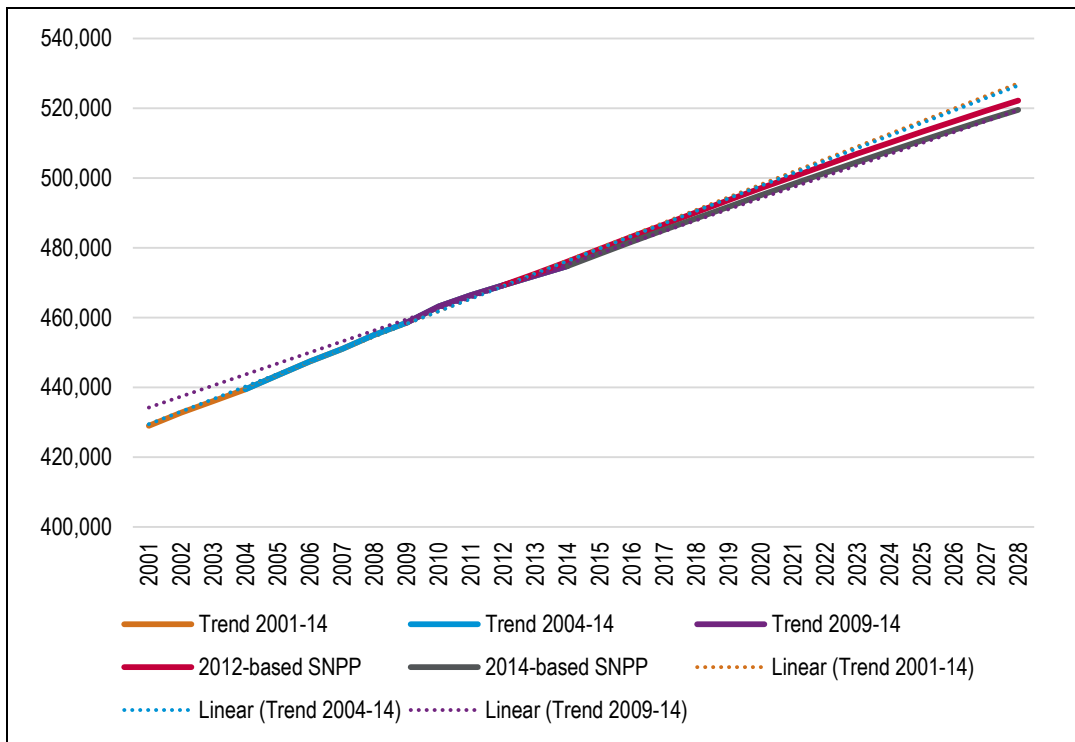
Figure 1: Indexed Population Growth (1981-2028)



Source: ONS

2.4 It is also worthwhile to focus this data on the more recent period (from 2001) and this is shown in the chart below (just for the Derby HMA); the figure also includes the trend from the 2012-based SNPP. The data also plots linear trend lines for the past 5-, 10- and 13-years (a 5-year period is broadly the trend period used by ONS when constructing the SNPP). The data shows that the population is expected to grow broadly in line with the past trends for much of the period to 2028 although the rate of population growth is expected to reduce slightly over time (which is consistent with what is projected nationally). Overall, the analysis shows a reasonable fit between past trends and the projection.

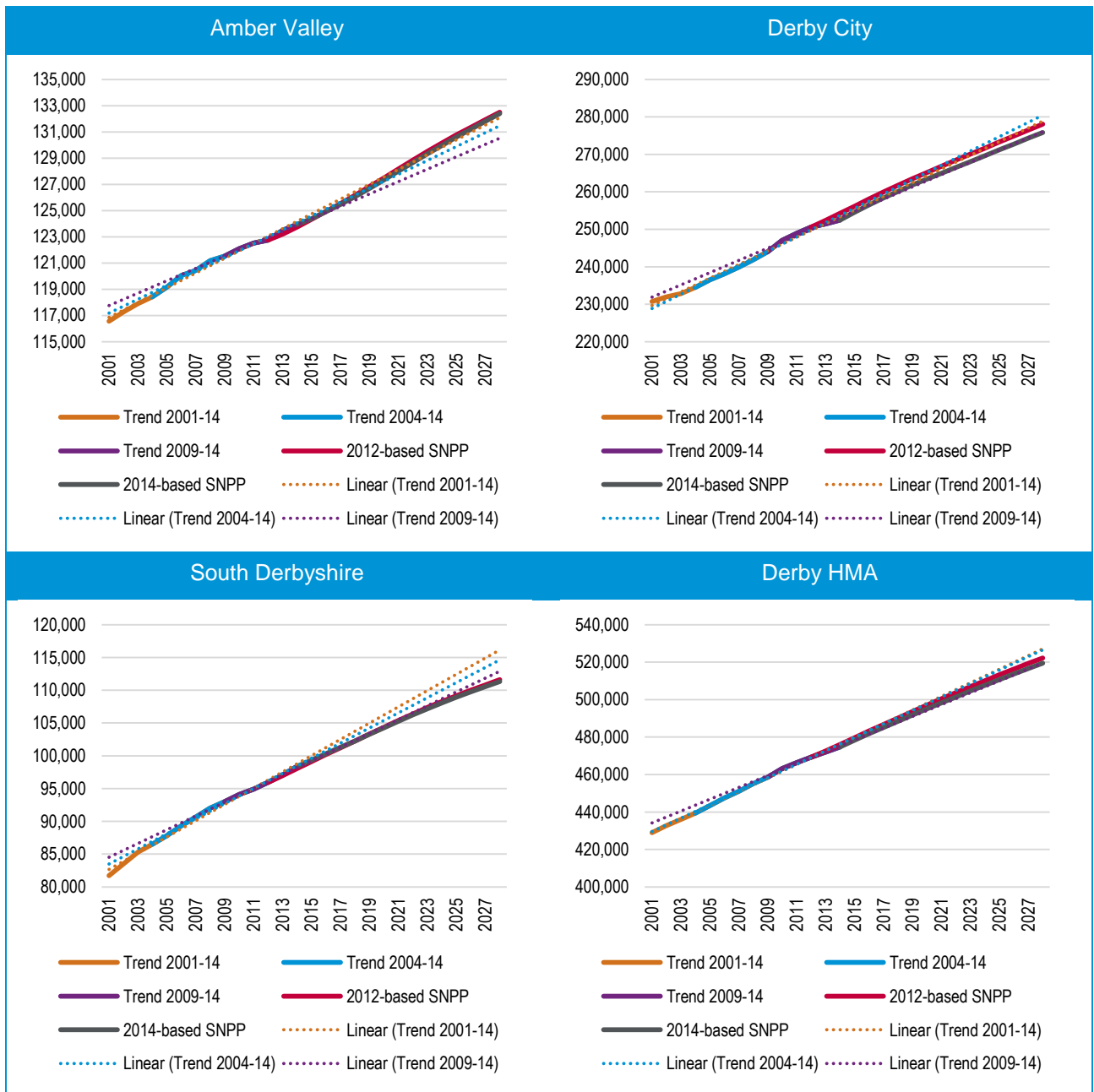
Figure 2: Past and Projected Population Growth (2001-2028) – Derby HMA



Source: ONS

2.5 The figure below shows the same information for each local authority. Generally, there is a reasonable correlation between past trends and the future projection. In Amber Valley, the future projection sits slightly above past trends with the opposite being seen in South Derbyshire. Overall, however, the differences are not particularly marked.

Figure 3: Past and Projected Population Growth (2001-2028) – local authorities



Source: ONS

3 COMPONENTS OF POPULATION CHANGE

3.1 Of the 53,100 projected increase in the population over the 2011-28 period around 55% is a result of projected natural increase (more births than deaths) while the remaining 45% is the projected net number of migrants. There are notable differences between areas with population growth in Amber Valley and South Derbyshire being dominated by net migration and natural change being the key driver in Derby City. The proportion of growth attributed to net migration is slightly higher in the 2014-based SNPP than was the case for the 2012-based version (39%). It should be noted that the figures in the table below do not quite add up; this is due to inclusion of 'other' changes in the 2011-14 period and small adjustments made by ONS (to ensure consistency with national projections) from 2014 to 2028.

Table 3: Projected Components of population change – 2014-based SNPP

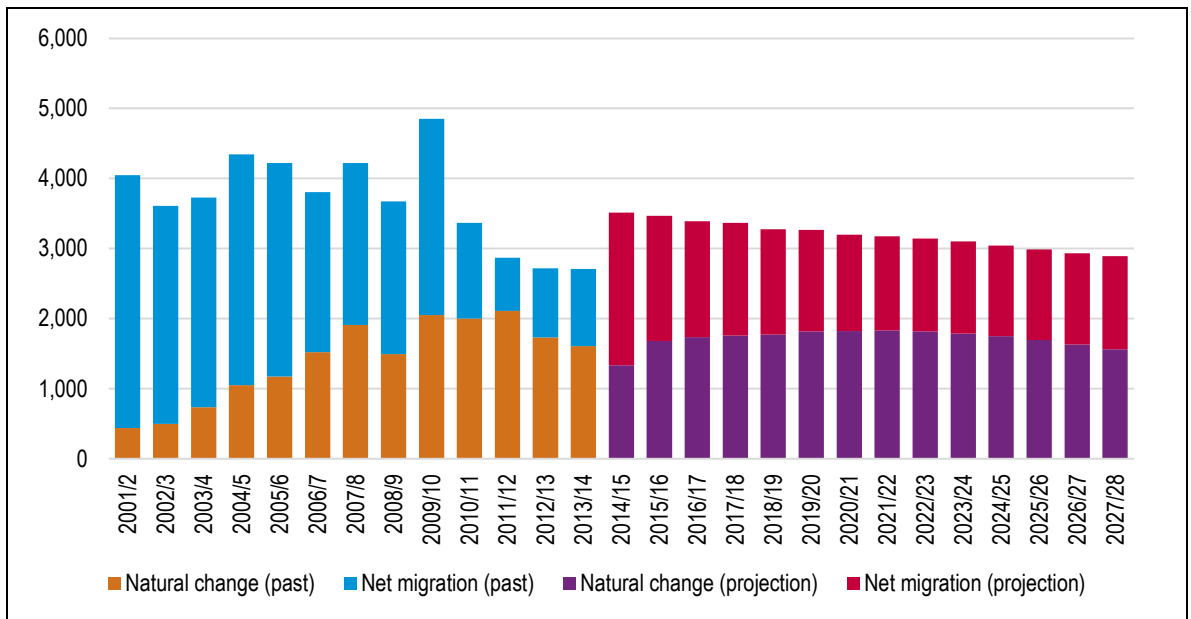
	Average natural change	Average net migration	Average population change	% of change as net migration
Amber Valley	16	561	581	97%
Derby City	1,443	140	1,580	9%
South Derbyshire	272	688	965	72%
Derby HMA	1,731	1,389	3,126	45%

Source: ONS

3.2 The figure below brings together data about migration (both past trends and the future projection) along with information about natural change. This shows that natural change is expected to increase until about 2021 and then start to fall as the projection works through to 2028. Net migration is generally projected to fall over time, which to a significant degree is driven by national projections expecting international migration to fall.

3.3 Over the whole projection period (2014-28) the level of natural change is projected to be 1,700 per annum, with net migration averaging about 1,500 people each year, starting from around 2,200 in 2014/15 and decreasing to around 1,300 by 2028.

Figure 4: Past and Projected Components of Change (2001-2028) – Derby HMA

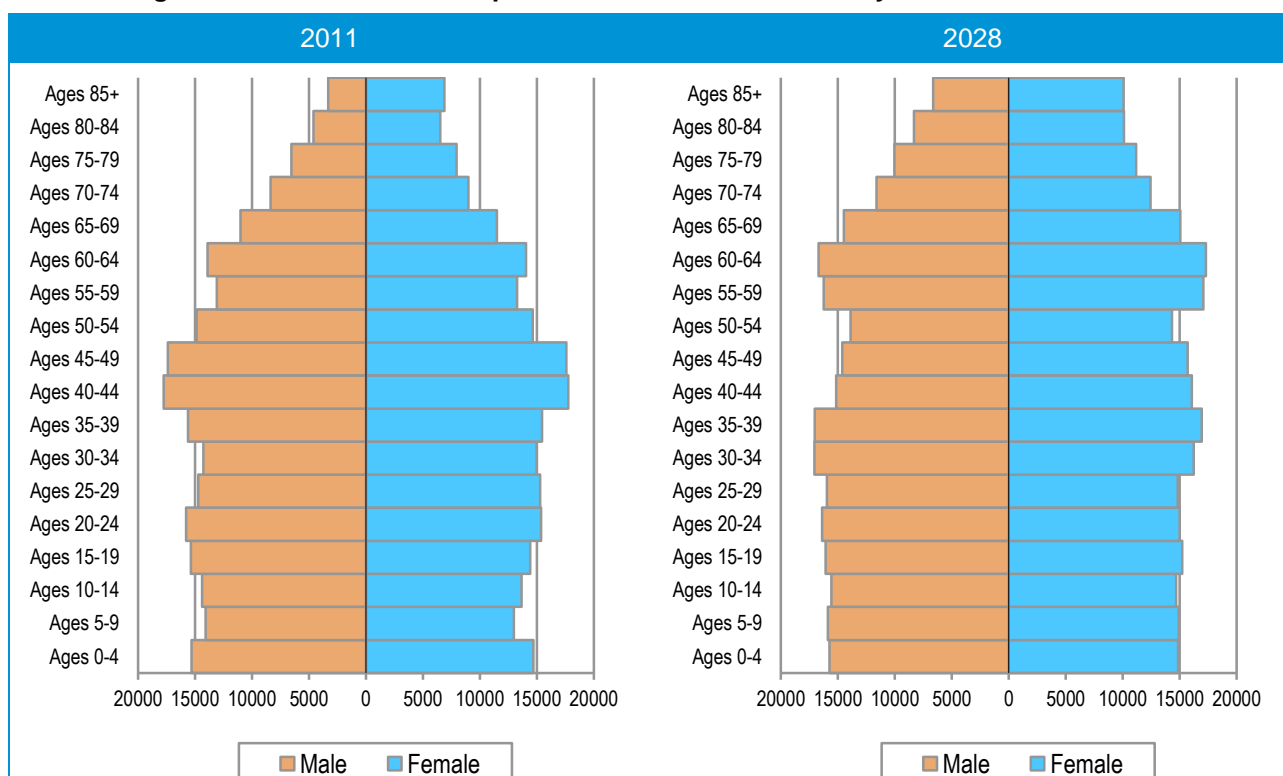


Source: ONS

4 AGE STRUCTURE CHANGES

4.1 With the overall change in the population will also come changes to the age profile. The figure below shows population pyramids for 2011 and 2028. The 'pyramids' clearly show the growth in population overall and highlight the ageing of the population with a greater proportion of the population expected to be in age groups aged 60 and over (and even more so for older age groups) – in particular the oldest age group (85+) shows an increase from 10,200 people to 16,700.

Figure 5: Distribution of Population 2011 and 2028 – Derby HMA



Source: ONS

4.2 The table below also summarises the findings for key (5 year) age groups. The largest growth will be in people aged 65 and over. In 2028 it is projected that there will be 110,000 people aged 65 and over. This is an increase of 34,300 from 2011, representing growth of 45%. The population aged 85 and over is projected to increase by an even greater proportion, 64%. Looking at the other end of the age spectrum the data shows that there are projected to be around 8% more people aged under 15 with increases also shown for most other age groups (decreases in the population from 40-54).

Table 4: Population Change 2011 to 2028 by five-year age bands – Derby HMA

Age group	Population 2011	Population 2028	Change in population	% change from 2011
Under 5	30,004	30,589	585	1.9%
5-9	27,054	30,816	3,762	13.9%
10-14	28,049	30,280	2,231	8.0%
15-19	29,771	31,296	1,525	5.1%
20-24	31,160	31,404	244	0.8%
25-29	30,006	30,789	783	2.6%
30-34	29,246	33,303	4,057	13.9%
35-39	31,082	33,975	2,893	9.3%
40-44	35,501	31,212	-4,289	-12.1%
45-49	34,979	30,322	-4,657	-13.3%
50-54	29,495	28,206	-1,289	-4.4%
55-59	26,374	33,318	6,944	26.3%
60-64	27,968	34,011	6,043	21.6%
65-69	22,507	29,559	7,052	31.3%
70-74	17,347	24,070	6,723	38.8%
75-79	14,510	21,224	6,714	46.3%
80-84	11,128	18,435	7,307	65.7%
85+	10,198	16,714	6,516	63.9%
Total	466,379	519,524	53,145	11.4%

Source: ONS

- 4.3 The table below shows projected population change (2011-28) for each of the three local authorities. This identifies that all areas are expected to see an ageing of the population whilst Amber Valley in particular sees population decreases in a number of the younger age groups. This will be linked to the lower proportionate increase in the population being projected in this area.

Table 5: Population Change 2011 to 2028 by five-year age bands – local authority data

Age group	Amber Valley	Derby City	South Derbyshire	% change from 2011
Under 5	253	8	323	585
5-9	606	2,395	761	3,762
10-14	-222	1,930	523	2,231
15-19	-613	1,681	457	1,525
20-24	-518	904	-141	244
25-29	14	714	55	783
30-34	994	2,490	574	4,057
35-39	271	1,842	780	2,893
40-44	-1,850	-1,639	-800	-4,289
45-49	-1,899	-2,275	-482	-4,657
50-54	-1,044	-598	353	-1,289
55-59	1,457	3,362	2,125	6,944
60-64	704	3,433	1,906	6,043
65-69	1,602	3,429	2,021	7,052
70-74	2,271	2,325	2,127	6,723
75-79	2,712	1,824	2,178	6,714
80-84	2,931	2,282	2,094	7,307
85+	2,206	2,751	1,558	6,516
Total	9,875	26,859	16,411	53,145

Source: ONS

- 4.4 It is also useful to compare the age structure projections from the 2014-based SNPP with similar figures in the 2012-based version. The simplest way to compare the figures is to look at the age structure in 2028; this is shown in the table below (for the whole HMA). This analysis shows that there is relatively little difference between the age structure (by 2028) in the two projection releases – typically less than a 1% difference. The main age group where a difference is shown is for people aged 85 and over where the population is projected to be 7% lower by 2028 than was projected in the 2012-based SNPP. This will potentially have some impact on household growth as it is the age group which has the highest household representative rates (i.e. people in this age group are most likely to be the ‘head’ of a household).

Table 6: Difference in age structure in 2028 (2012- and 2014-based SNPP) – Derby HMA

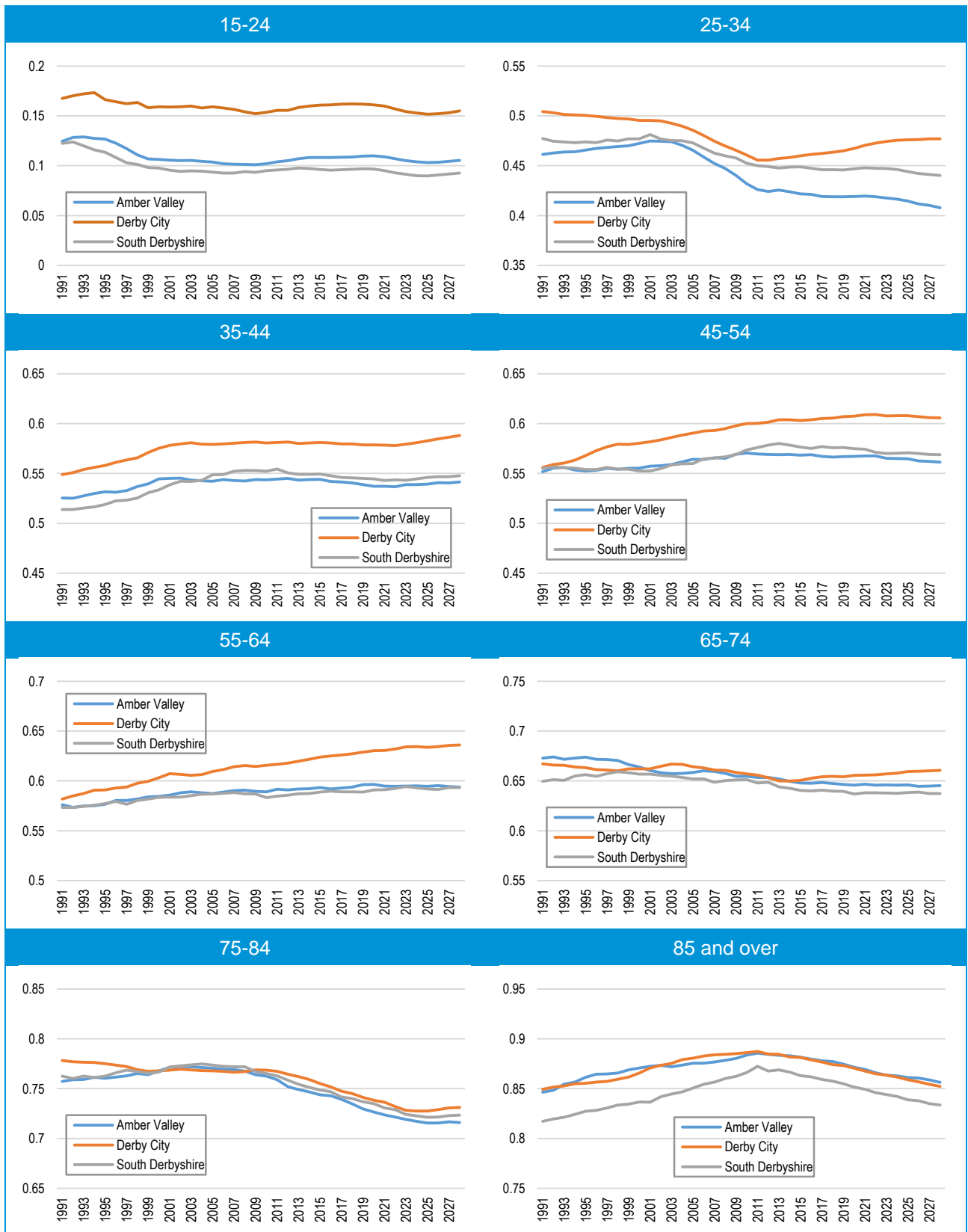
Age group	2012-based	2014-based	Difference	% difference from 2012-based
Under 5	30,761	30,589	-172	-0.6%
5-9	31,131	30,816	-315	-1.0%
10-14	31,025	30,280	-745	-2.4%
15-19	30,652	31,296	644	2.1%
20-24	31,311	31,404	93	0.3%
25-29	30,918	30,789	-129	-0.4%
30-34	33,403	33,303	-100	-0.3%
35-39	34,507	33,975	-532	-1.5%
40-44	31,400	31,212	-188	-0.6%
45-49	30,459	30,322	-137	-0.5%
50-54	28,248	28,206	-43	-0.2%
55-59	33,371	33,318	-53	-0.2%
60-64	34,089	34,011	-78	-0.2%
65-69	29,523	29,559	37	0.1%
70-74	23,874	24,070	196	0.8%
75-79	21,067	21,224	158	0.7%
80-84	18,425	18,435	10	0.1%
85+	18,012	16,714	-1,298	-7.2%
Total	522,176	519,524	-2,652	-0.5%

Source: ONS

5 HOUSEHOLD GROWTH PROJECTIONS

- 5.1 Having studied the population size and the age/sex profile of the population the next step in the process is to convert this information into estimates of the number of households in the area. To do this the concept of headship rates is used. Headship rates can be described in their most simple terms as the number of people who are counted as heads of households (or in this case the more widely used Household Reference Person (HRP)).
- 5.2 At the time of writing the latest set of headship rates are from the 2012-based CLG household projections. The projections were published in two stages; Stage 1 in February 2015 and Stage 2 in December 2015. The Stage 1 household projections projected household formation based on data from the 1971, 1981, 1991, 2001 and 2011 Censuses with outputs for age, sex and marital status. For younger age groups greater weight was given in the CLG projections methodology to the dampened logistical trend than the simple logistics trend; the effect of which is to give greater weight to the shorter-term trends.
- 5.3 The Stage 2 household projections considered household types and the methodology report accompanying the projections is clear that these projections are based on just two data points – the 2001 and 2011 Censuses. Overall outputs on total household growth are constrained to the totals from the Stage 1 Projections. This means that both sets of projections show the same level of overall household growth (when set against the last set of SNPP) but some of the age specific assumptions differ. Differences can however occur between the Stage 1 and 2 headship rates when modelled against different population projections (due to differences in the age structure and therefore applicable to the 2014-based SNPP).
- 5.4 Overall, it is considered that the Stage 1 projections should be favoured over the Stage 2 figures for the purposes of considering overall household growth; this is for two key reasons: a) the Stage 1 figures are based on a long-term time series (dating back to 1971 and using 5 Census data points) whereas the Stage 2 figures only look at two data points (2001 and 2011) and b) the Stage 2 figures are constrained back to Stage 1 values, essentially meaning that it is the Stage 1 figures that drive overall estimates of household growth in the CLG household projections themselves. The analysis to follow therefore looks at the Stage 1 figures.
- 5.5 It is useful initially to interrogate how the projections differ for different age groups and the figure below shows a summary of the headship rates used in the analysis (the actual data uses 5-year age bands for males and females separately). It is evident from the analysis that household formation amongst households in their late 20s and early 30s fell over the 2001-11 decade although the projections show some slowing down of this falling rate (indeed, an increase in the case of Derby City).

Figure 6: Projected household formation rates by age of head of household



Source: Derived from CLG data

5.6 By applying the above headship rates, it is possible to estimate the projected household growth and this is shown in the table below. It should be noted that the analysis also takes account of the institutional population and information about this has also been drawn from the 2012-based CLG household projections. The analysis shows a growth in households of around 28,900 over the 17-year period (1,702 per annum) – around half of the projected household growth is in Derby.

Table 7: Projected Household Growth 2011-28 – 2014-based SNPP

	Households 2011	Households 2028	Change in households	Per annum
Amber Valley	52,695	58,928	6,234	367
Derby City	102,300	116,343	14,043	826
South Derbyshire	39,146	47,798	8,652	509
Derby HMA	194,141	223,069	28,928	1,702

5.7 A similar analysis can be undertaken by applying the headship rate figures to the 2012-based SNPP (as is shown in the table below). This shows a slightly higher level of household growth (1,820 per annum); the main difference can be seen in Derby City where the estimated household growth using this older projection is about 100 per annum higher; for Amber Valley and South Derbyshire the differences are quite modest.

Table 8: Projected Household Growth 2011-28 – 2012-based SNPP

	Households 2011	Households 2028	Change in households	Per annum
Amber Valley	52,695	59,075	6,380	375
Derby City	102,300	118,004	15,705	924
South Derbyshire	39,146	47,996	8,850	521
Derby HMA	194,141	225,075	30,935	1,820

6 HOUSING NEED

6.1 As well as providing estimates of household growth under different scenarios it is also possible to make estimates of the number of additional homes this might equate to. To do this a vacancy allowance is included in the data. Two different allowances have been modelled; based on 2011 Census data and 2015 Council Tax Records (CTR). In both cases the analysis seeks to look at the uplift from occupied homes that should be applied to the data.

6.2 The derivation of vacancy allowances is shown below; across the whole HMA the Census measure provides a figure of 4.2% with the CTR based figures being somewhat lower (at 2.5%). The CTR may be lower due to some homes not being registered as vacant, however the difference between the two figures in Derby does suggest that there has been some reduction in the number of vacant homes over the last few years.

Table 9: Derivation of vacancy allowance

	Amber Valley	Derby City	South Derbyshire	HMA
Census occupied	52,596	102,271	38,992	193,859
Census unoccupied	2,346	4,416	1,390	8,152
Census vacancy allowance	4.5%	4.3%	3.6%	4.2%
CTR occupied	54,257	105,980	40,387	200,624
CTR unoccupied	1,644	2,348	990	4,982
CTR vacancy allowance	3.0%	2.2%	2.5%	2.5%

Source: 2011 Census and Council Tax Records

6.3 It is assumed that such a level of vacant homes will allow for movement within the housing stock and includes an allowance for second homes. This report does not form a view about which measure of vacancy allowance should be preferred and the tables below therefore shows estimates of the likely housing need with both rates being applied (the first table provides per annum figures and the second shows totals for full 2011-28 period).

6.4 The analysis shows an annual need ranging from 1,744 dwellings when using the 2014-based SNPP and a CTR vacancy rate up to 1,895 with the older (2012-based) SNPP and a Census vacancy allowance. For the full projection period, these figure represent a need in the range of 29,600 to 32,200.

Table 10: Estimated housing need including vacancy allowance – per annum

	2014-based (Census vacancy)	2014-based (CTR vacancy)	2012-based (Census vacancy)	2012-based (CTR vacancy)
Amber Valley	383	378	392	387
Derby City	862	844	964	944
South Derbyshire	527	521	539	533
Derby HMA	1,772	1,744	1,895	1,864

Table 11: Estimated housing need including vacancy allowance – 2011-28

	2014-based (Census vacancy)	2014-based (CTR vacancy)	2012-based (Census vacancy)	2012-based (CTR vacancy)
Amber Valley	6,512	6,422	6,664	6,573
Derby City	14,649	14,354	16,383	16,053
South Derbyshire	8,960	8,864	9,166	9,067
Derby HMA	30,121	29,640	32,213	31,693

7 ALTERNATIVE METHODS FOR LOOKING AT HEADSHIP RATES

7.1 Whilst we have no strong evidence that the 2012-based headship rates are unsound, it is worthwhile looking at potential alternative ways of looking at the interpretation of these rates. A number of methods have been considered in the past and many of these put weight on the use of the 2008-based CLG projection headship rates. The sort of methods used include:

- Blended headship – where the rates are comprised of a combination of the 2012- and 2008-based rates. In some cases, this ‘blending’ is only carried out for specific age groups (generally with the aim of increasing the apparent housing need); an approach which is not considered to be robust as it is clear that patterns of formation vary across different age bands and any analysis should be viewed for the population as a whole.
- Full-return to trend – a second approach is to return all household formation rates back to those observed in the 2008-based projections. This is also not considered to be a robust approach given that the 2008-based figures were prepared at a point in time at which interest rates had been at a historical low point for some time; coupled with availability of a range of mortgage deals (including 100% mortgages) which in a historical context would be seen as somewhat exceptional.

7.2 Overall, it is not considered that there is any merit in using the 2008-based rates in the analysis (whether as a partial or full adjustment). Not taking account of these historic figures has some considerable support from academic analysts with the late Alan Holmans for example noting that part of the shift away from 2008-based household formation rates relates to international migration and different household structures within new migrant communities. He identifies that this “*will not be reversed.*” This point is particularly important in Derby City which has higher levels of international migration than the other two local authorities.

7.3 More recent research by Ludi Simpson and Neil McDonald has also considered these issues and is clear that it is not appropriate to revert to the 2008-based household representative rates, setting out: “*it is no longer sensible to appeal to previous household projections including the 2008-based set as if they were evidence of an underlying trend in household formation. They were produced at a time when household formation had already changed, starting before the economic downturn of the mid-to-late 2000s, and are in themselves only evidence of the optimism of that period.*”

7.4 The PAS technical advice note (July 2015) also supports this position, noting that ‘*The CLG 2008 HRRs are no longer helpful because they are based on very old evidence, and anyway may not reflect the true long-term trend.*’

7.5 Despite these reservations, the analysis below has provided a sensitivity to the headship rates which takes some account of the older (2008-based) figures. We have run a scenario where the rates for all age groups partially return to the levels previously set out in the older projections. The 2008-based projections ran to 2033 and the methodology employed seeks to take the rates back to

a halfway point between the 2012-based and 2008-based figures. This midpoint has been applied consistently to all age groups and is assumed to be reached by 2033 (hence in this report where the data is provided to 2028, the full 'part-return' is not fully completed).

7.6 The tables below show that with this sensitivity the level of housing need would be projected to increase (by about 6%-7% across the HMA). Using the latest (2014-based) SNPP and a Census-based vacancy allowance, this sensitivity shows a need for 1,893 dwellings per annum, about 32,200 over the 2011-28 period. The increases using this sensitivity can particularly be seen in Amber Valley (where the figures typically increase by 11%), with South Derbyshire showing relatively little difference (increasing by just 2%).

Table 12: Estimated housing need including vacancy allowance – per annum (part-return to 2008-based headship rates)

	2014-based (Census vacancy)	2014-based (CTR vacancy)	2012-based (Census vacancy)	2012-based (CTR vacancy)
Amber Valley	426	420	435	429
Derby City	928	910	1,031	1,011
South Derbyshire	538	532	550	544
Derby HMA	1,893	1,862	2,016	1,983

Table 13: Estimated housing need including vacancy allowance – 2011-28 (part-return to 2008-based headship rates)

	2014-based (Census vacancy)	2014-based (CTR vacancy)	2012-based (Census vacancy)	2012-based (CTR vacancy)
Amber Valley	7,244	7,145	7,390	7,289
Derby City	15,783	15,465	17,533	17,179
South Derbyshire	9,148	9,050	9,348	9,248
Derby HMA	32,175	31,660	34,271	33,716