

4 DEMOGRAPHIC DRIVERS OF DEMAND

4.01 This section analyses the underlying components of housing demand by examining demographic change over the last two decades, alongside historic and current structures and trends of those who occupy housing within each of the defined benchmark areas. The benchmarks used within the analysis, which stem from the earlier analysis of the spatial extent of the local housing markets in the Peak Sub-Region, primarily comprise the HPDD Sub-Area:

- High Peak;
- Derbyshire Dales.

4.02 In addition, **where possible**, analysis has been undertaken for the area covered by the **Peak District National Park (PDNP)**. The majority of the information presented in this section is provided for the entirety of the National Park, including that which lies outside of the HPDD Sub-Area. However, in some instances information is presented for the area of the National Park that falls within the HPDD Sub-Area. The data for the National Park area is predominantly sourced from the 2001 Census and trend data is limited given the lack of coverage within national surveys. The data for these areas is benchmarked against Derbyshire, the East Midlands and England.

Key Points

The population of the HPDD Sub-Area is 160,900, of which slightly more is in High Peak (where most of the main population centres are) than Derbyshire Dales.

- A 7% increase in population since 1981 is similar to the rate for Derbyshire and England, though less than that of the wider East Midlands region, and most of the increase has been in High Peak (10%, compared to a 3% increase in Derbyshire Dales)
- The HPDD sub-area has an older population than average, with a significant over representation of people aged 45 and over, and under representation of people aged under 45; the most pronounced differences are in Derbyshire Dales and the Peak National Park
- The population growth has been driven by higher than average growth in the 45-64, 65-74 and 74+ age groups, which all exceeded national and regional benchmarks
- Corresponding with the pattern of overall population growth, most of the growth of the older age groups has been in High Peak, which also corresponds with the migration patterns highlighted in Section 3 of this SHMA
- However, the age profile of Derbyshire Dales is aging at a quicker pace than High Peak due to falls in the 15-24 and 25-44 age groups, with High Peak recording significant growth and a smaller fall, respectively.
- In High Peak District the pattern of above average decline in the 0-14 age group is counterpart to the aging population, with there being fewer families with young children, mirrored in the 25-44 age groups. The growth in the 15-24 age group, coupled with the similar strong growth in the 45-64 age group, suggests an influx of older families with equity to spend, from the Greater Manchester sub-region and

elsewhere. By implication younger families are leaving the area. Housing costs are probably a significant factor in this pattern of selective migration.

- Some of the trends in the High Peak are replicated in the Derbyshire Dales but in Derbyshire Dales there is a significant decline in the 15-24 age group and a much more significant growth of the 45-64 age group. This suggests that selective patterns of migration are bringing into the Derbyshire Dales a significant number of 'empty nesters', perhaps having taken early retirement. Derbyshire Dales has a higher proportion of pensioners than average, as does the National Park
- This movement of older families to High Peak might relate to the larger than average size of households in the Borough's area; higher than all the comparators at 2.3 per household space. In contrast, the notably lower number of people per household space in Derbyshire Dales (below all the other comparators) reflects the number of pensioner households, and the growth in the number of empty nester households
- Household growth in High Peak (at 12%) is similar to the East Midlands, and higher than the England and Derbyshire average, whilst growth in Derbyshire Dales (9%) and the Peak District National Park area (5%) are lower than the benchmarks
- Whilst the household formation rate of Derbyshire Dales is, at 9%, relatively low, it is still notable by the fact that it is high relative to the growth of the population – at 3.1 times the growth of the population. This compares with a multiplier of 2.5 for High Peak, and reflects the significant growth in smaller households in Derbyshire Dales
- The increasingly older population profile (and hence smaller households) of Derbyshire Dales is reflected in the projected (EMRA - policy based) 5% fall in the population over 2001-26, pushing the overall HPDD projection down to -1%, despite projected growth in High Peak of 2%. To put this in context, the wider county of Derbyshire has a projected growth of 10%. This contrasts with the projected 18% growth in households across the HPDD sub-area.
- The policy on which the EMRA projections are based on is one of restraint, compared to unrestrained ONS projections of 9% growth over the period (12% and 5% for High Peak and Derbyshire Dales respectively) and 11% for Derbyshire.
- The University of Manchester CSSR research noted that dwelling completions of approximately 90 per year (which exceeds the most recent completion rate) would be required to sustain the current population of the National Park – so a fall in population is likely within the National Park
- Owner-occupation has continued to increase in tenure share in the HPDD sub-area, driven by absolute growth – mostly in High Peak, and at a slightly higher rate than the East Midlands and England, and from a higher base. There has also been an increase in renting, though not in Derbyshire Dales
- The fall in Social Rented accommodation has been similar to the benchmark areas, though from a lower base

Population

- 4.03 The 2005 population of the HPDD Sub-Area was 160,900, with the Peak Sub-Region being slightly larger at 167,500. Of the two districts that comprise the HPDD Sub-Area, a slightly higher proportion of the population live within the High Peak district (91,100), although there is a sizeable population across Derbyshire Dales (69,800). The National Park covers a significant proportion of the HPDD Sub-Area and according to figures produced by the PDNPA derived from the 2001 Census, 31,200 of the residents live within the National Park¹. As noted, not all of the National Park lies within the HPDD Sub-Area and a further 6,600 people live within the National Park, predominantly within Staffordshire Moorlands.

Table 4.1: Population Estimates for the HPDD Sub-Area and the wider Peak Sub-Region

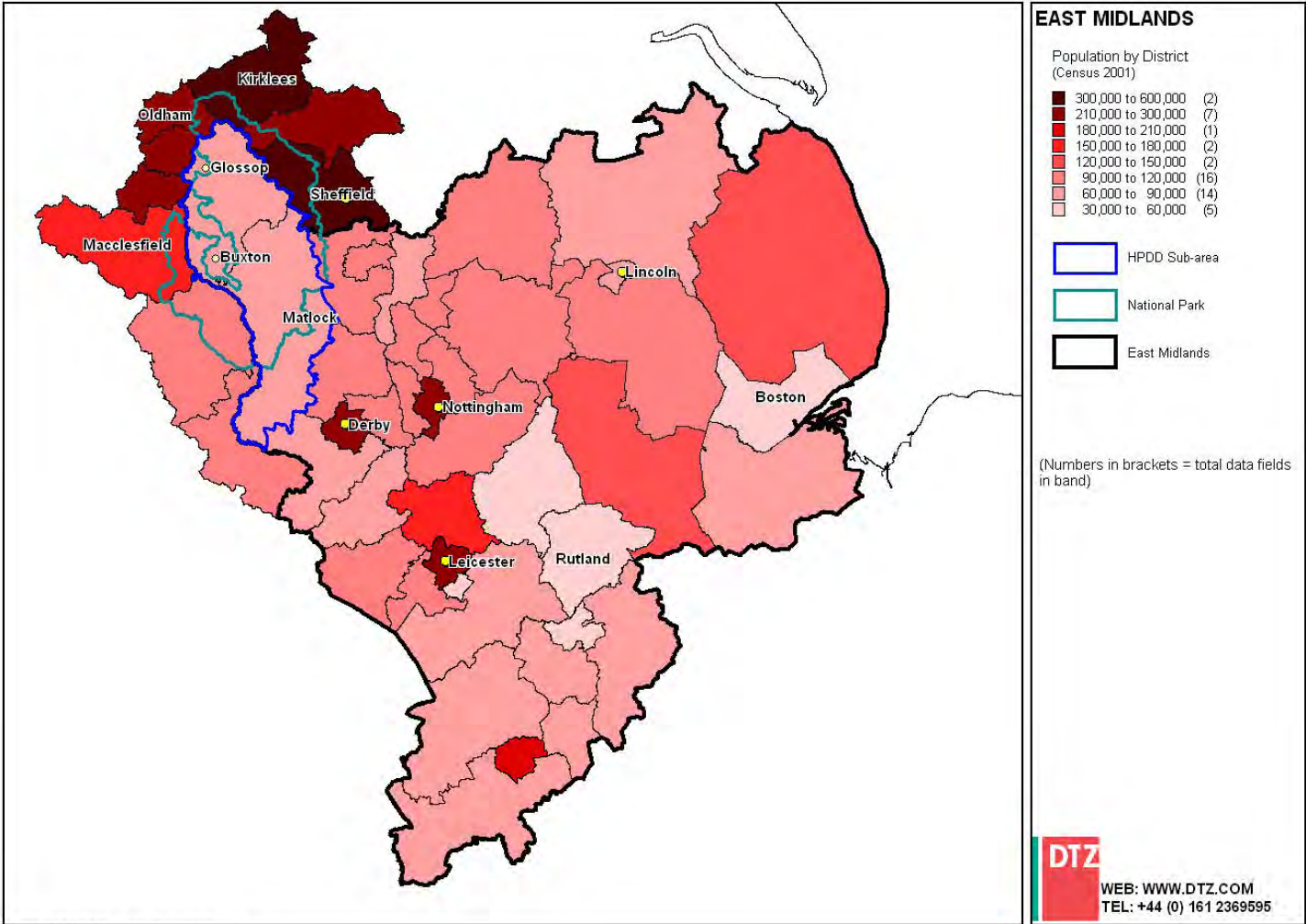
	Total Population (2005)	Population resident in National Park (2001)	% Resident in National Park
Derbyshire Dales	69,800	24,700	36%
High Peak	91,100	6,500	7%
HPDD Sub-Area	160,900	31,200	20%
Peak Sub-Region	167,500	37,900	23%

Source: ONS Population Estimates, Census of Population

- 4.04 Figure 4.1 illustrates the level of population within the HPDD Sub-Area compared with other districts in the East Midlands. When compared with districts within Derbyshire, the HPDD Sub-Area has a relatively low population, although elsewhere within the East Midlands there are districts with significantly lower populations, such as Rutland and Boston. However, when compared with neighbouring districts outside of the East Midlands it is apparent that the HPDD Sub-Area is surrounded by a number of significant population centres, particularly Manchester and Sheffield.
- 4.05 Another useful measure in determining the concentration of the population across the study area is the number of people per hectare. Figure 4.2 (which examines the 2001 population level) presents the population distribution within the HPDD Sub-Area and highlights the concentrations of population within a small number of settlements (at Super Output Area (SOA)) across the sub-region.

¹ Estimating the level of population within the National Park is complicated by the boundaries of the park not corresponding directly to any of the boundaries used for collecting statistical information through national surveys, such as the census of population. As a result, the National Park Authority has estimated population levels from the proportion of addresses that fall within each Super Output Area (SOA) – the smallest unit of data collection.

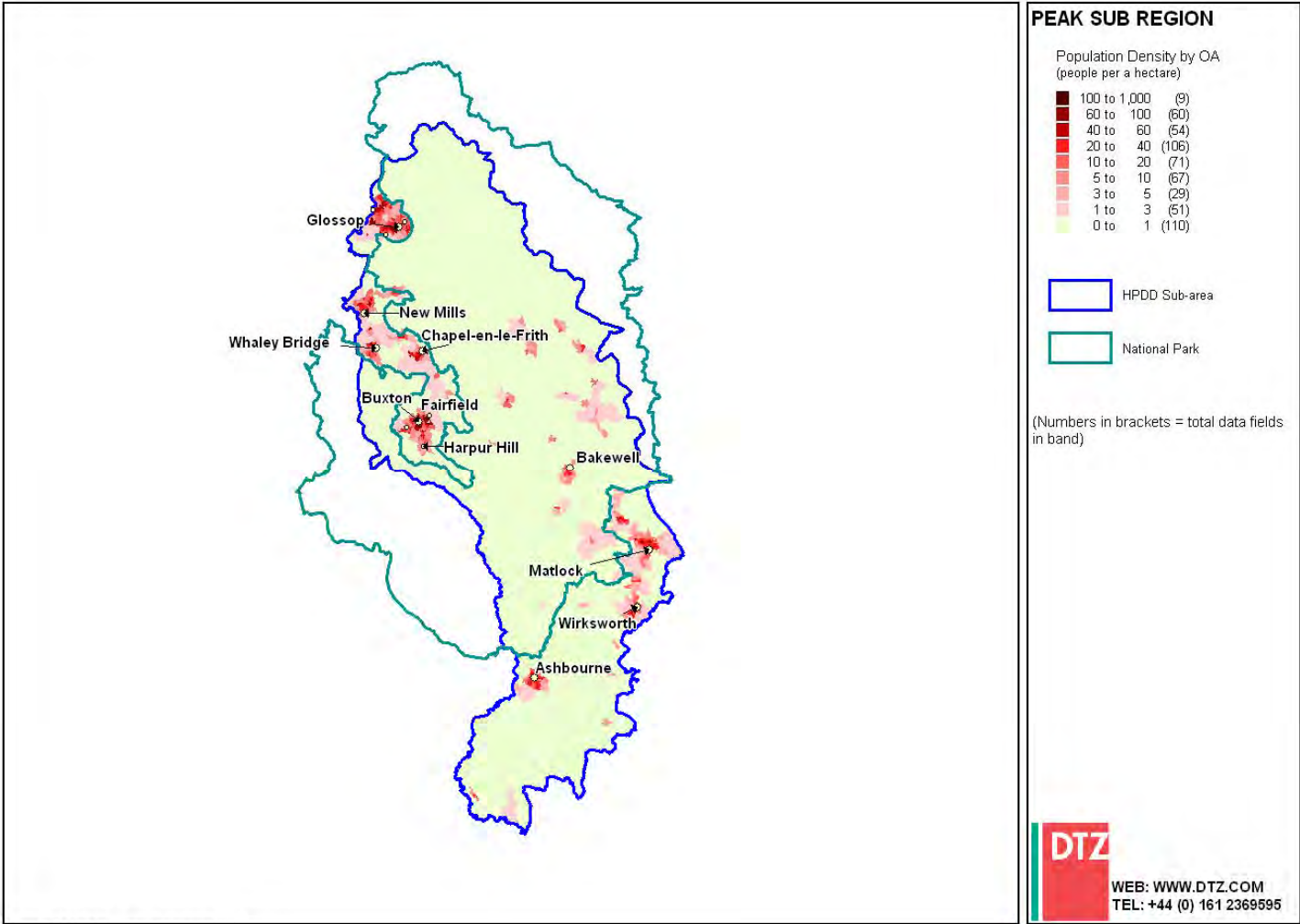
Figure 4.1: Population by District in the East Midlands



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Source: 2001 Census

Figure 4.2 – People per Hectare (2001 Census)



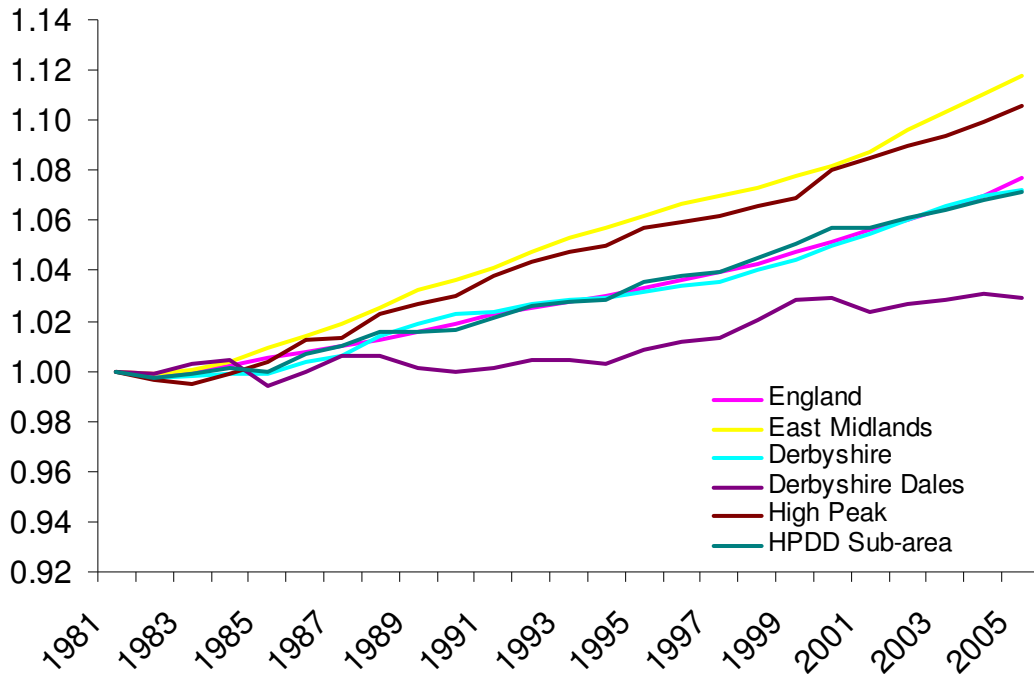
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Source: ONS

- 4.06 Figure 4.2 shows population densities for the HPDD Sub-Area. The main concentrations of population are within the High Peak Borough area; the population within the Derbyshire Dales is generally more dispersed although Matlock is an important service centre. Population densities are highest in the urban centres of Glossop (32,200 persons), Buxton (20,800), Matlock (11,300) and New Mills (8,900). Other smaller urban centres include Chapel-en-le-Frith (6,600), Ashbourne (5,000), Wirksworth (5,000), Whaley Bridge (4,700), Bakewell (3,700) and Darley Dale (3,300)². With the key exception of Bakewell, most of the main centres of population lie outside of the National Park.
- 4.07 Figure 4.3 and Table 4.2 show population growth over the period 1981-2004. Overall the population of the HPDD Sub-Area has increased at a fairly steady rate, growing by approximately 10,000 people in the last two decades. This represents a 7% increase since 1981. The growth rate experienced by the HPDD Sub-Area since 1981 is very similar to the rate of population growth across Derbyshire and England as a whole (NOTE: There is no information available about population change in the National Park area).
- 4.08 The majority of the population increase has been concentrated in the High Peak Borough, which has seen an increase in its population of some 8,700 people. The population of the High Peak Borough has been steadily increasing over the last two decades, experiencing an increase in population size of 10%. This increase is just below the increase experienced by the East Midlands.
- 4.09 In contrast, Derbyshire Dales has experienced a relatively small increase in comparison to other areas. The population has only increased by approximately 3% in the last 23 years, and the population, therefore, has remained fairly constant. Derbyshire Dales does not seem to have a clear trend in its population growth, the general pattern shows the population to be stable between 1981 and 1995, and then from 1995 to 2005 the area has seen a very small increase in its population.
- 4.10 As discussed previously, providing an estimate of overall population within the National Park requires a degree of estimation. The added complication of boundary changes between each Census means that caution must be used when comparing population estimates from one Census to the next. However, figures produced for the overall National Park (which includes areas outside of the HPDD Sub-Area) from the 1981 Census and 1991 Census suggest that total population has not changed significantly since 1981. This therefore contrasts significantly with the growth in population in the area outside the Park.

² Urban area population estimates are sourced from Key Statistics for Urban Areas (2001 Census) <http://www.statistics.gov.uk/StatBase/ssdataset.asp?vlnk=8271&Pos=2&ColRank=1&Rank=224>

Figure 4.3 Indexed Population Change, 1981-2005



Source: ONS Mid Year Population Estimates

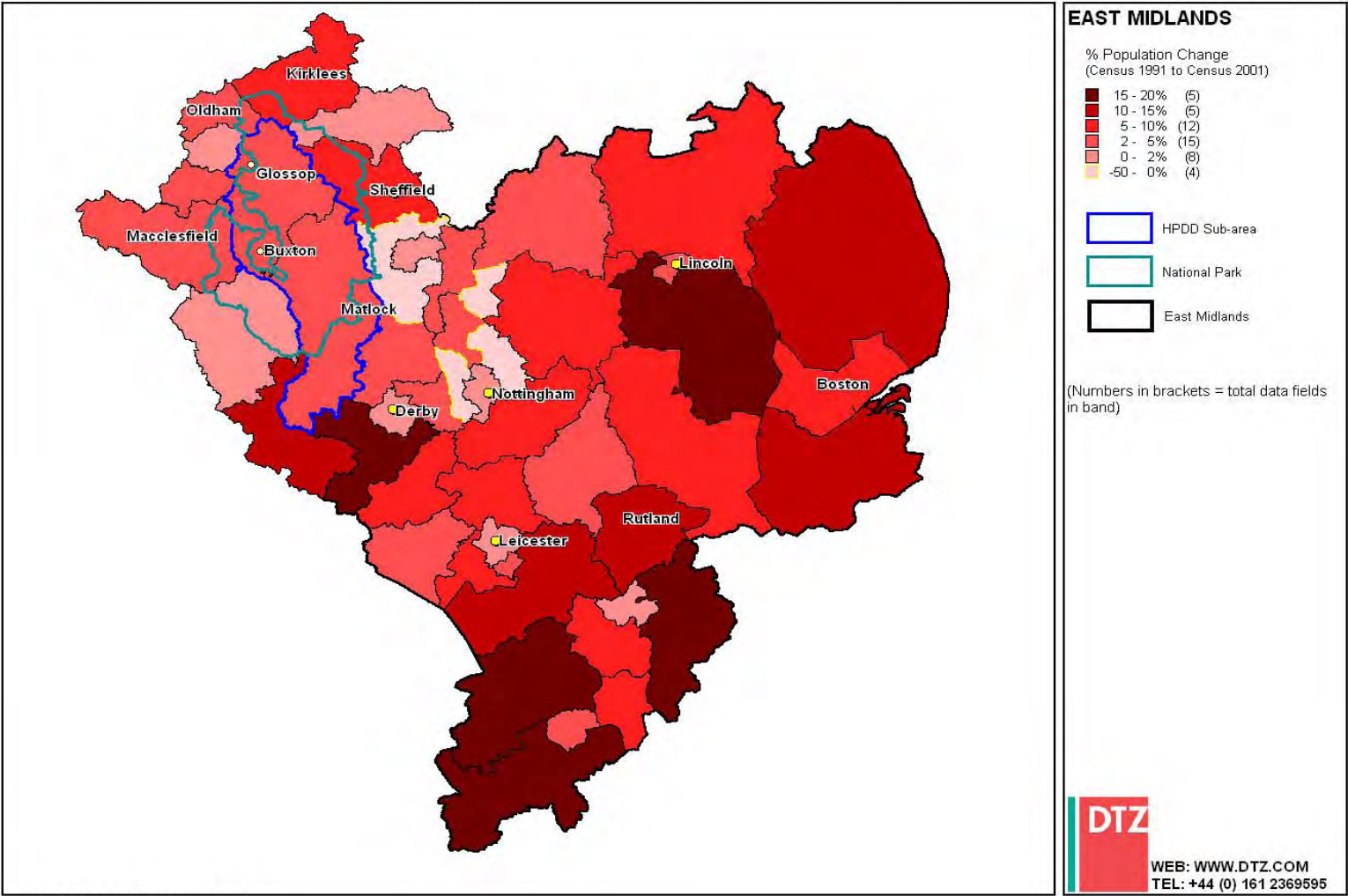
Table 4.2: Population Change, 1981-2005

Date	Derbyshire Dales	High Peak	HPDD Sub Area	Derbyshire	East Midlands	England
1981	67,800	82,400	150,200	697,000	3,852,700	46,820,800
1991	67,900	85,500	153,400	713,500	4,011,400	47,875,000
1995	68,400	87,100	155,500	718,900	4,091,700	48,383,500
2005	69,800	91,100	160,900	747,500	4,306,300	50,431,700
Change 1981 - 2005	2,000	8,700	10,700	50,500	453,600	3,610,900
% Change 1981 - 2005	2.9%	10.6%	7.1%	7.2%	11.8%	7.7%

Source: Mid Year Population Estimates

4.11 Figure 4.4 presents the spatial distribution of population growth across the districts of the study area and the wider region between the 1991 and 2001. This shows that the level of growth experienced in the HPDD Sub-Area falls in the mid-range of districts across the East Midlands. A number of districts in Derbyshire and Nottinghamshire have experienced declining populations, including the neighbouring district of North East Derbyshire. In contrast, South Derbyshire has experienced extremely strong population growth at 16% between 1995-2005.

Figure 4.4: % Population Change 1991 to 2001



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Source: Census 1991 and 2001

- 4.12 The age structure of the population influences the level, type and tenure of housing that is required. For example, a population that is younger and more mobile tends to have a higher demand for privately rented accommodation and faces greater difficulties accessing owner occupier property than older populations.
- 4.13 Figure 4.5 and Table 4.3 show the overall age profile of the HPDD Sub-Area relative to the East Midlands and England. With the exception of young people (aged under 14), the HPDD Sub-Area has a significantly lower population under the age of 44 compared with the benchmark areas. The area also has a higher proportion of persons over 65 than the benchmark areas.

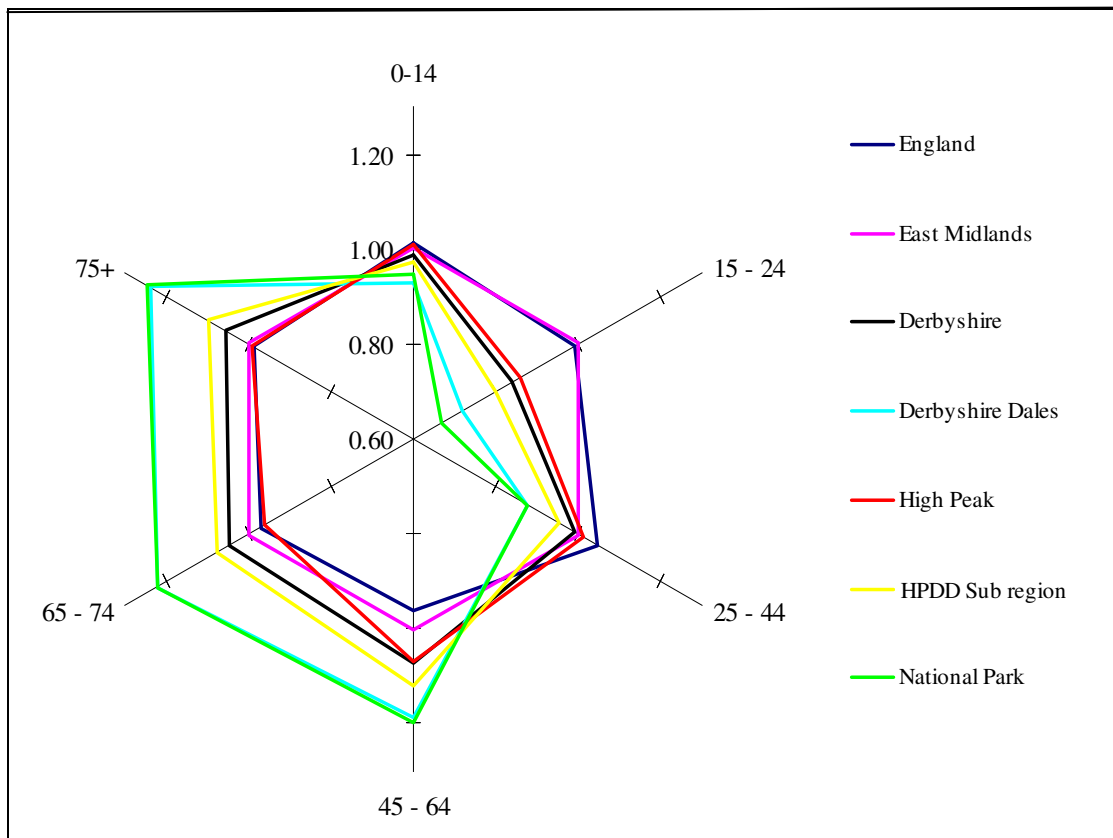
Table 4.3: Population by Age 2005

	Total	0-14	15 - 24	25 - 44	45 - 64	65 - 74	75+
Derbyshire Dales	69,800	16.5%	9.5%	24.1%	30.1%	10.5%	9.6%
High Peak	91,100	17.9%	11.3%	27.8%	27.1%	8.2%	7.7%
HPDD Sub-Area	160,900	17.3%	10.5%	26.2%	28.4%	9.2%	8.5%
Derbyshire	747,500	17.6%	11.0%	27.1%	27.1%	8.9%	8.2%
East Midlands	4,306,300	17.8%	13.2%	27.4%	25.4%	8.6%	7.8%
England	50,431,700	18.0%	13.0%	28.7%	24.3%	8.3%	7.7%
PDNPA (2001)	37,900	16.7%	8.7%	24.1%	31.2%	10.2%	9.2%

Source: Mid Year Population Estimates

- 4.14 In terms of the age profile of the population, the main difference between the HPDD Sub-Area and the regional average is that of those between 15 and 65, a significantly higher percentage of people living within the HPDD Sub-Area are over the age of 45. Compared to the East Midlands, the HPDD Sub-Area has a slightly lower proportion of young people (aged 0-14), and a slightly higher proportion of people aged over 65.
- 4.15 Derbyshire Dales shows a more pronounced difference compared with the regional average, with a lower proportion of people aged 15-24 and 25-44 compared with the East Midlands. It also shows that there is a higher proportion of people aged 45 and over in the Derbyshire Dales when compared with the East Midlands and a higher proportion of elderly people, when compared with England, Derbyshire and the East Midlands, with 50% of those living in the Derbyshire Dales being 45 or over whilst only 42% of those from the East Midlands are above this age.
- 4.16 Although the High Peak area shows a lower proportion of 15-24 year olds, the rest of the breakdown of age in the area is very similar to the East Midlands.
- 4.17 The most distinguishing feature of the age profile of the National Park is the relatively low proportion of people aged 15-24 and high proportion aged 45-64 compared with all the other benchmark areas. This is similar to the Derbyshire Dales picture.

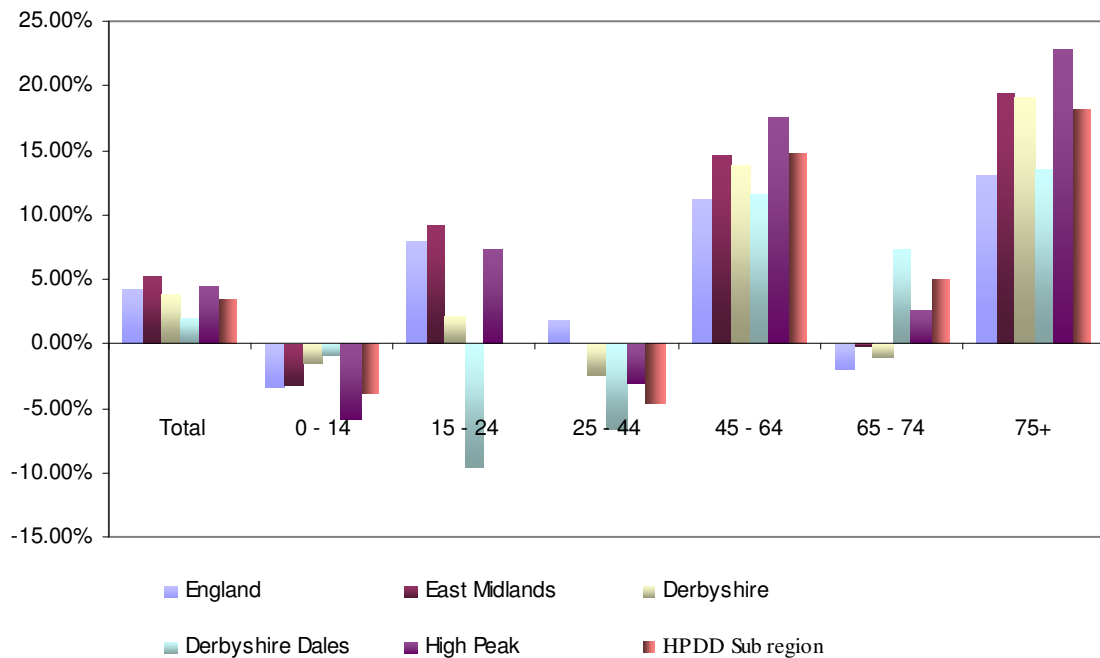
Figure 4.5 Age Structure Breakdown, 2005 (East Midlands Average = 1.00)



Source: ONS Mid Year Population Estimates, 2005

- 4.18 It is important to establish whether population growth is being driven by expansion in one or more specific age brackets as this may indicate demand for a particular type of tenure of housing. Figure 4.6 and Table 4.4 show the percentage population change in each age bracket.
- 4.19 The HPDD Sub-Area has seen an increase of 14.8% in those aged between 45 and 64, 5% in those aged 65 – 74 and an 18% increase in those aged above 74 between 1995 and 2005. The increases in these age groups have been greater than the increases experienced by England, the East Midlands and Derbyshire. Both the Derbyshire Dales and the High Peak areas have seen an increase in individuals aged above 45, however the increase is more prevalent in High Peak.
- 4.20 All the study areas (HPDD Sub-Area, national, regional and local) have seen a fall in individuals aged 0 – 14. However, all but one of the areas has seen an increase in individuals aged between 15 and 24. The only exception is the Derbyshire Dales, which has seen a fall in this age group by 9.6%. The Derbyshire Dales, High Peak and Derbyshire have all seen a fall in the number of individuals aged 25 – 44. This is in contrast to England, which has seen an increase of 2% and the East Midlands, which has seen no change in this age category.

Figure 4.6 Percentage Population Growth by Age Group – 1995-2005



Source: ONS Mid Year Population Estimates

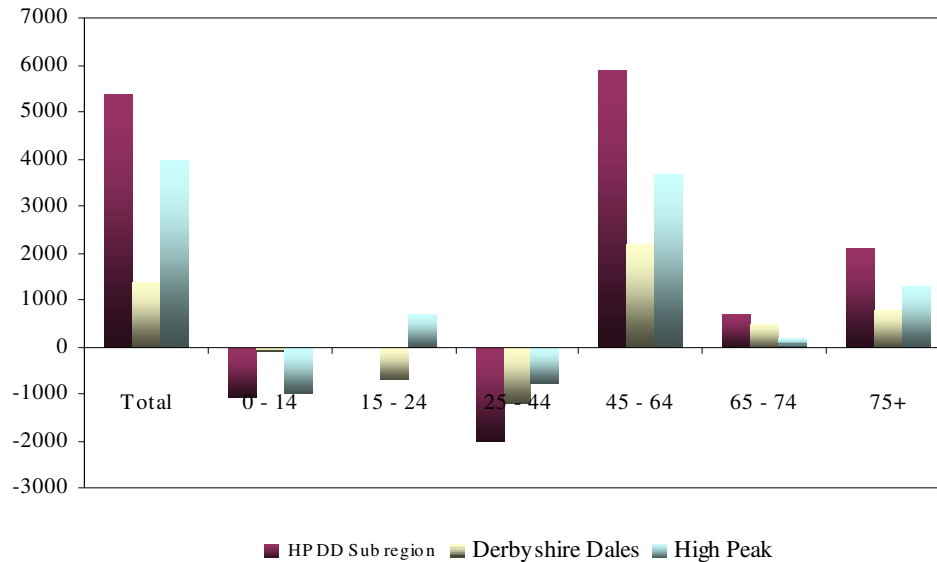
Table 4.4: Percentage Population Growth by Age Group – 1995-2005

Date	Total	0 - 14	15 - 24	25 - 44	45 - 64	65 - 74	75+
Derbyshire Dales	2.0%	-0.9%	-9.6%	-6.7%	11.7%	7.4%	13.6%
High Peak	4.6%	-5.8%	7.3%	-3.1%	17.6%	2.7%	22.8%
HPDD Sub-Area	3.5%	-3.8%	0.0%	-4.5%	14.8%	5.0%	18.1%
Derbyshire	4.0%	-1.5%	2.2%	-2.5%	13.8%	-1.0%	19.1%
East Midlands	5.2%	-3.2%	9.2%	0.0%	14.6%	-0.3%	19.5%
England	4.2%	-3.3%	8.0%	2.0%	11.2%	-2.0%	13.1%

Source: Mid Year Population Estimates

- 4.21 Figure 4.7 presents the same data as outlined above but in absolute terms. From the diagram it can be seen that the major change in the HPDD Sub-Area has been due to increases in the High Peak area rather than the Derbyshire Dales. The overall population of the High Peak area has increased by 4,000 people, which is far greater than the 1,400 increase for the Derbyshire Dales. The HPDD Sub-Area has seen a decline in its population aged under 45 at 3,100 people. The major increases have been for the age group 45-64 which have increased by 2,200 people in Derbyshire Dales and 3,700 in High Peak. .
- 4.22 Although all areas have experienced a high percentage increase in the number of persons aged 75 and over, the actual number of persons this represents is significantly lower than the growth experienced within the 45-64 year old age range.

Figure 4.7 Absolute Change in Population by Age, 1995-2005



Source: ONS Mid Year Population Estimates

Table 4.5: Absolute Changes in Population by Age, 1995-2005

	Total	0 - 14	15 - 24	25 - 44	45 - 64	65 - 74	75+
Derbyshire Dales	1,400	-100	-700	-1,200	2,200	500	800
High Peak	4,000	-1,000	700	-800	3,700	200	1,300
HPDD Sub-Area	5,400	-1,100	0	-2,000	5,900	700	2,100
Derbyshire	28,600	-2,000	1,800	-5,100	24,600	-700	9,800
East Midlands	214,600	-25,600	47,700	-100	139,300	-1,000	54,500
England	2,048,200	-313,100	485,000	277,800	1,236,900	-86,700	448,100

Source: ONS Mid Year Population Estimates

Ethnicity

4.23

Table 4.6 shows the ethnic composition of the study and benchmark areas. It shows the ethnic make-up of the Derbyshire Dales, High Peak, HPDD Sub-Area and the National Park is predominately white (99.1%, 98.7%, 98.9% and 99.1% respectively). These proportions show a low level of ethnic diversity when compared with England and the East Midlands, which only have 90.9% and 93.5% of the population registered as (ethnically) white respectively. The proportions for the HPDD Sub-Area, High Peak, the Derbyshire Dales and the National Park are however indicative of Derbyshire as a whole.

Table 4.6 Housing Ethnicity Composition

	All People	White	Mixed	Asian	Black	Chinese or Other Ethnic Group
Derbyshire Dales	69,468	99.1%	0.4%	0.2%	0.1%	0.2%
High Peak	89,433	98.7%	0.6%	0.2%	0.2%	0.3%
HPDD Sub-Area	158,901	98.9%	0.5%	0.2%	0.2%	0.2%
Derbyshire	734,585	98.5%	0.5%	0.5%	0.2%	0.2%
East Midlands	4,172,174	93.5%	1.0%	4.0%	0.9%	0.5%
England	49,138,831	90.9%	1.3%	4.6%	2.3%	0.9%
PDNPA	37,900	99.3%	0.3%	0.2%	0.1%	0.1%

Source: 2001 Census

Household Composition and Tenure

- 4.24 Figure 4.8 shows the household composition for the HPDD Sub-Area. The major household types for this region are couples with no children accounting for 18,250 households (27%); couple with dependents accounting for 15,170 households (23%); pensioners accounting for 16,730 households (25%); and single adults accounting for 8,275 households (13%).
- 4.25 In 2001, the date of the last Census, very few students and lone parents lived in the HPDD Sub-Area. This is likely to have changed in recent years with the establishment of the University of Derby's new campus at the former Devonshire Royal Hospital in Buxton. This accommodates up to 5,000 students³. The University provides only 290⁴ bed spaces, all at the purpose built High Peak Halls. This places pressure on the rental market in a town, which traditionally has had a very limited stock of rental accommodation, and which is now the second most expensive rental location in the HPDD⁵ Sub-Area⁶. Developers are beginning to respond to this situation, with purpose built 4 and 5 bedroom HMOs emerging to serve the student market⁷.

³ <http://www.highpeak.gov.uk/business/econdev/Profile/>

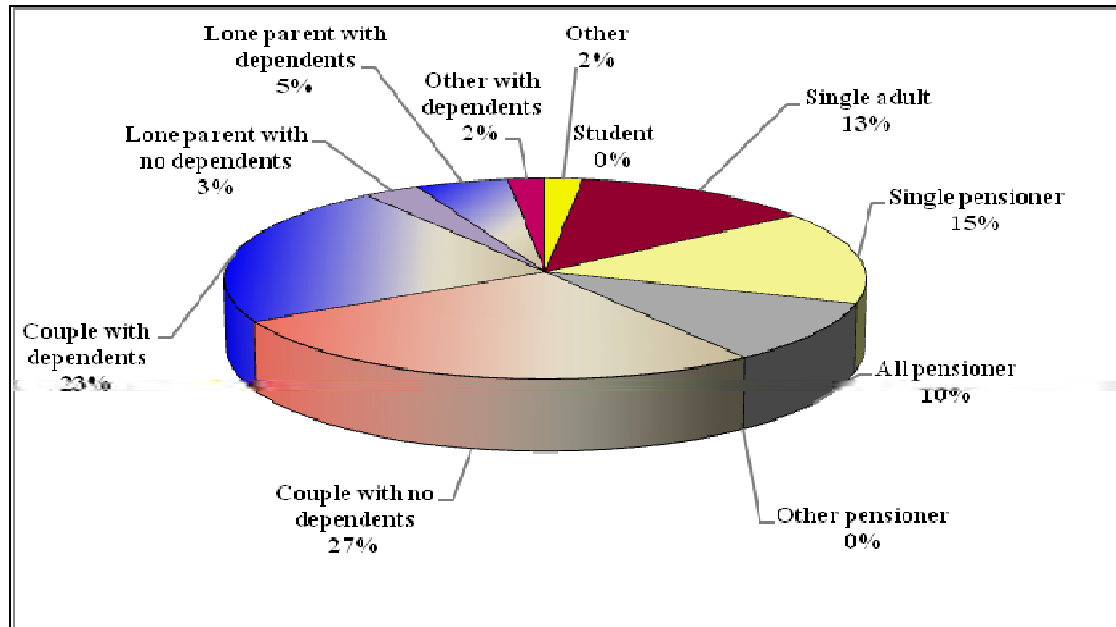
⁴ <http://www.derby.ac.uk/buxton-halls-of-residence/high-peak-halls>

⁵ The John Hetherington Housing Needs Survey rather confusingly classifies the area covered by Derbyshire Dales District and High Peak Borough (and otherwise known in this SHMA as the HPDD sub-area), as the Peak Sub Region. The widely accepted geographical term of reference for the Peak Sub-Region is taken to be that contained in the RSS, which extends to include the entire area of the Peak District National Park

⁶ Derbyshire Dales & High Peak Joint Housing Needs Survey, Covering the Peak Sub-Region, Final Report, March 2007, John Herington Associates

⁷ <http://investors.assetz.co.uk/property-detail.htm?propID=2853>

Figure 4.8 Household Composition – HPDD Sub-Area



Source: Census 2001

4.26 Table 4.7 outlines household composition in the study areas in more detail. The High Peak area has a very similar composition to England in general, except it has a slightly lower proportion of single adults and a higher proportion of couples (with and without children). The Derbyshire Dales is also similar to England, although it has a higher proportion of pensioners when compared with England and the East Midlands. Like High Peak, it also has a higher proportion of couples (with and without children), when compared with England. The National Park closely resembles the pattern displayed in the Derbyshire Dales.

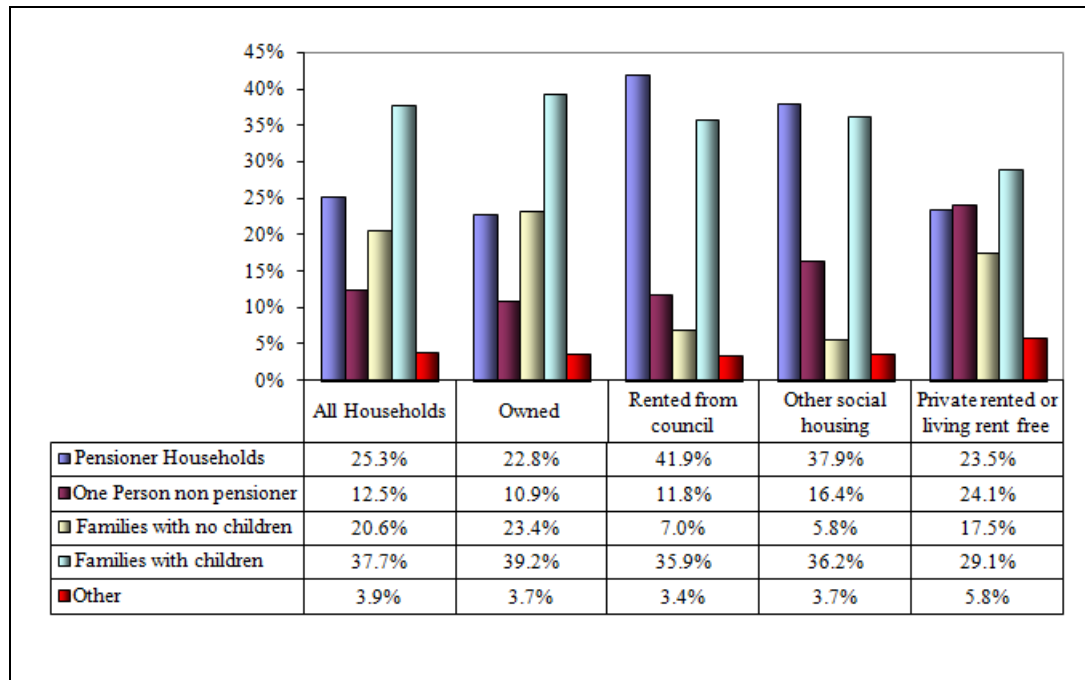
Table 4.7: Household Composition

	High Peak	Derbyshire Dales	HPDD Sub Area	England	East Midlands	Derbyshire	PDNPA
Couple with no dependents	27.1%	28.3%	27.6%	24.0%	26.2%	28.0%	29.7%
Couple with Dependents	23.9%	21.8%	22.9%	20.8%	21.7%	22.6%	21.3%
Single Pensioner	14.1%	16.0%	15.0%	14.4%	13.9%	14.6%	16.2%
Single Adult	13.0%	11.8%	12.5%	15.7%	14.3%	13.0%	11.2%
All pensioner	8.8%	11.4%	9.9%	8.9%	9.7%	9.8%	11.4%
Lone Parent with dependents	5.6%	3.7%	4.8%	6.4%	6.1%	5.3%	2.9%
Lone parent with no dependents	3.3%	2.7%	3.0%	3.0%	2.7%	2.9%	2.9%
Other	2.3%	2.3%	2.3%	3.7%	2.7%	2.1%	2.2%
Other with dependents	1.6%	1.4%	1.5%	2.2%	1.8%	1.4%	1.6%
Other pensioner	0.4%	0.5%	0.4%	0.4%	0.3%	0.3%	0.6%
Student	0.0%	0.0%	0.0%	0.4%	0.5%	0.0%	0.0%

Source: Census 2001

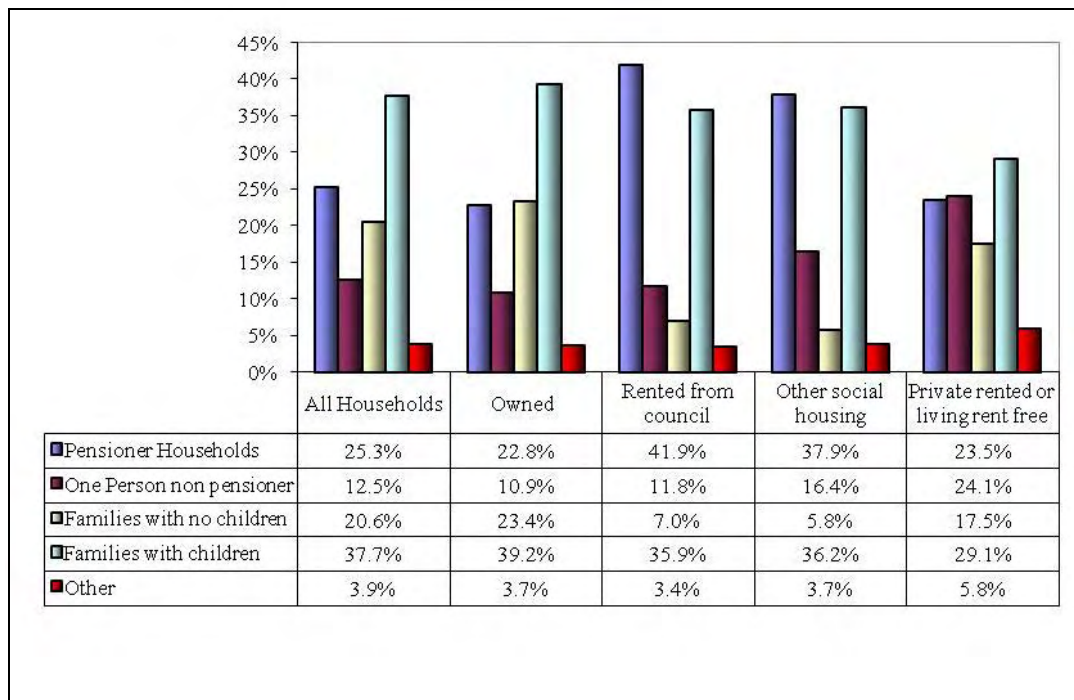
- 4.27 Figure 4.9 shows the analysis of household composition by tenure for the HPDD Sub-Area. In the broad household categories, the most prominent household in the HPDD Sub-Area is the family with children (37.7%). The second most prominent household is a pensioner household (25.3%). Pensioners, however, rely upon social housing more than any other group, and this makes consideration of how the large 45-64 (Baby Boomer) cohort might be housed particularly important (See Chapter 10). Of all the properties rented from the Council, 41.9% are rented by pensioners and 35.9% are rented by families with children. Of all social housing, 37.9% is rented by pensioner households whilst 36.2% is rented by families with children.
- 4.28 It should be noted that the majority of owner-occupiers are families with children (39.2%), followed by families with no children (23.4%) and pensioners (22.8%). The private rented sector looks to be fairly evenly distributed between the different household types. The major group (See Figure 4.9) renting social housing (council or other social housing) is pensioner households. This is followed closely by families with children (35.9% and 36.2% respectively). This data is available from the 2001 Census at district level, and it has not been possible to reproduce the analysis for the National Park

Figure 4.9 HPDD Sub-Area – Household Composition by Tenure



Source: Census 2001

Figure 4.10 East Midlands – Household Composition by Tenure



Source: Census 2001

- 4.29 Figure 4.10 shows the analysis of household composition by tenure for the East Midlands region. The figure demonstrates that tenure distribution by household type in the HPDD Sub-Area is similar to that in the wider East Midlands region. For example:
- An over representation of pensioner households in social rented (rented from the Council and “other social housing”) accommodation;
 - An over representation of one person (non pensioner) households in “other social housing” and private rented / rent free accommodation;
 - An under representation of families with no children households in social rented accommodation;
 - An under representation of families with children in private rented / rent free accommodation.

4.30 However, there are differences in some instances with regard to the magnitude of over or under representation, as below:

- Pensioner Households in Social Rented – greater over representation in the HPDD Sub-Area than in the East Midlands;
- One Person (Non-Pensioner) Households in “Other Social Housing” and Private Rented/ Rent Free Accommodation – lesser over representation in the HPDD sub-area than in the East Midlands;
- Families with Children in Private Rented / Rent Free Accommodation – greater under representation in the HPDD Sub-Area than in the East Midlands.

Tenure Patterns

- 4.31 The pattern of tenure change between 1991 and 2001 is shown in Table 4.8. The 2% increase in owner occupation in the HPDD Sub-Area reflects regional and national trends. Private renting has also increased in the HPDD Sub-Area, though the increase is concentrated in the High Peak Borough area where it is in line with regional and national trends; the proportion of households renting in Derbyshire Dales has remained static, and in the National Park it has fallen. The level of private renting is quite likely to have increased since 2001 in line with national trends and in response to the development of Buxton Campus of the University of Derby.
- 4.32 There has been a reduction of between 3-5% in the proportion of households renting from the Council for the HPDD Sub-Area. This has been in part counter balanced by an increase (of approximately 1%) in the proportion of households renting other social housing. However, it should be noted the combined council and RSL social rented housing stock accounts for only 13% of the total housing stock in the sub-area compared to 18% in the East Midlands and 19% nationally.

Table 4.8: Tenure Change 1991-2001 (Source: Census)

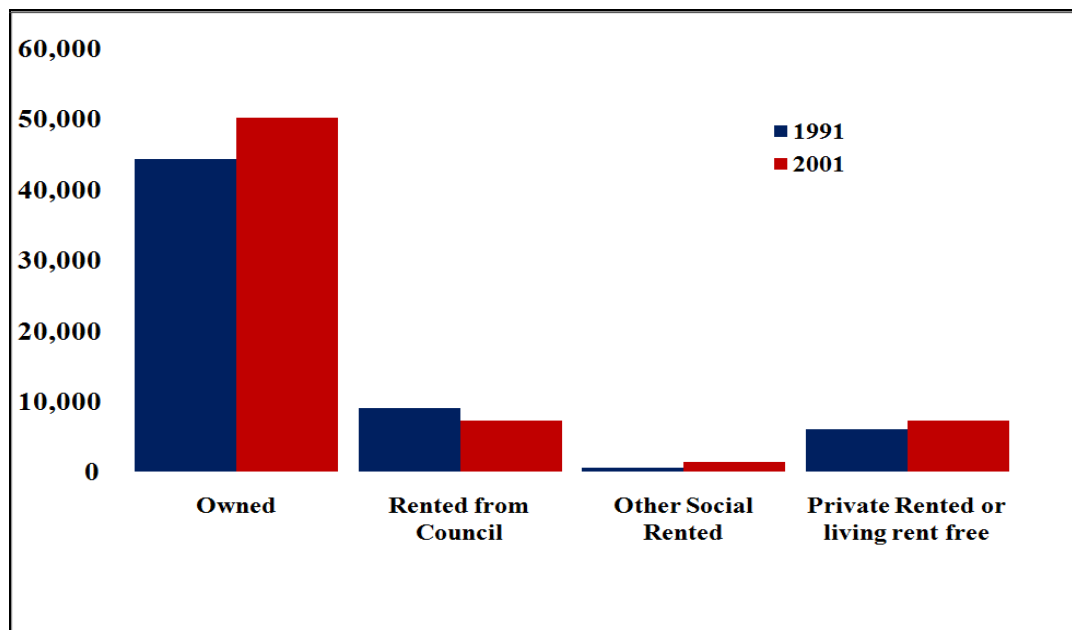
		Total Dwellings	Owned	Rented from Council	Other Social Rented	Private Rented or living rent free
Derbyshire Dales	1991	26,736	73%	14%	1%	12%
	2001	29,052	75%	11%	2%	12%
High Peak	1991	33,123	75%	16%	1%	8%
	2001	37,056	77%	11%	2%	10%
HPDD Sub-Area	1991	59,859	74%	15%	1%	10%
	2001	66,108	76%	11%	2%	11%
Derbyshire	1991	280,585	72%	19%	1%	7%
	2001	308,876	74%	15%	2%	8%
East Midlands	1991	1,547,985	71%	19%	2%	8%
	2001	1,732,483	72%	14%	4%	10%
England	1991	18,545,529	68%	20%	3%	9%
	2001	20,451,427	69%	13%	6%	12%
PDNPA	1991	15,132	73%	11%		15%
	2001	15,949	76%	8%	2%	14%

Source: Census 1991 and Census 2001

4.33

Figure 4.11 outlines the absolute change in property numbers between 1991 and 2001. The number of properties in the HPDD Sub Area increased by over 6,000, with approximately 63% of this increase coming from the High Peak area. The highest increase in terms of property numbers has been in terms of owner occupation, accounting for all of the net increase in properties, with the High Peak area again constituting the majority of this increase.

Figure 4.11 HPDD Sub-Area Tenure Change 1991-2001 (Source: Census)

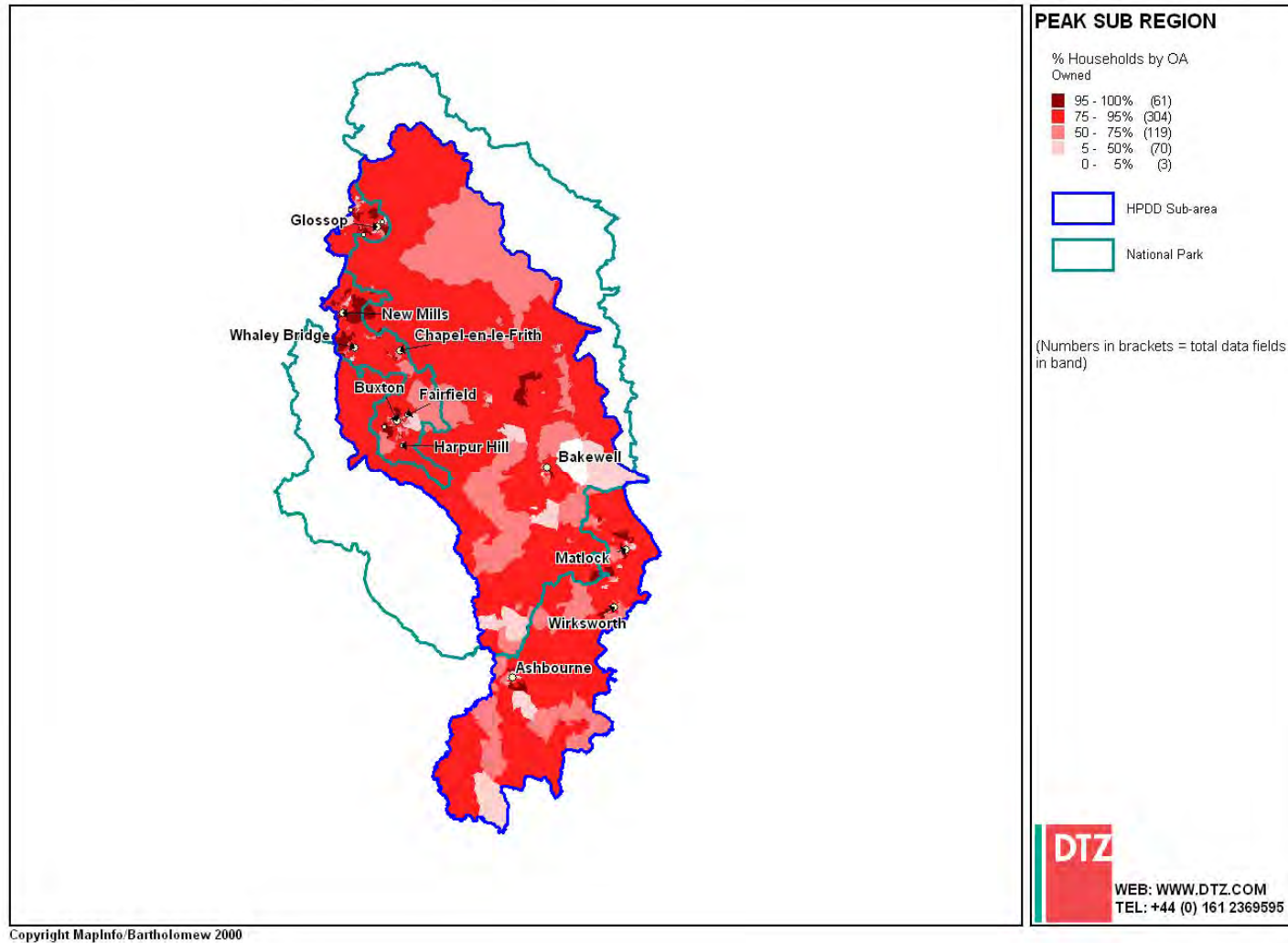


Source: Census 2001, Census 1991

Spatial Distribution of Households by Tenure

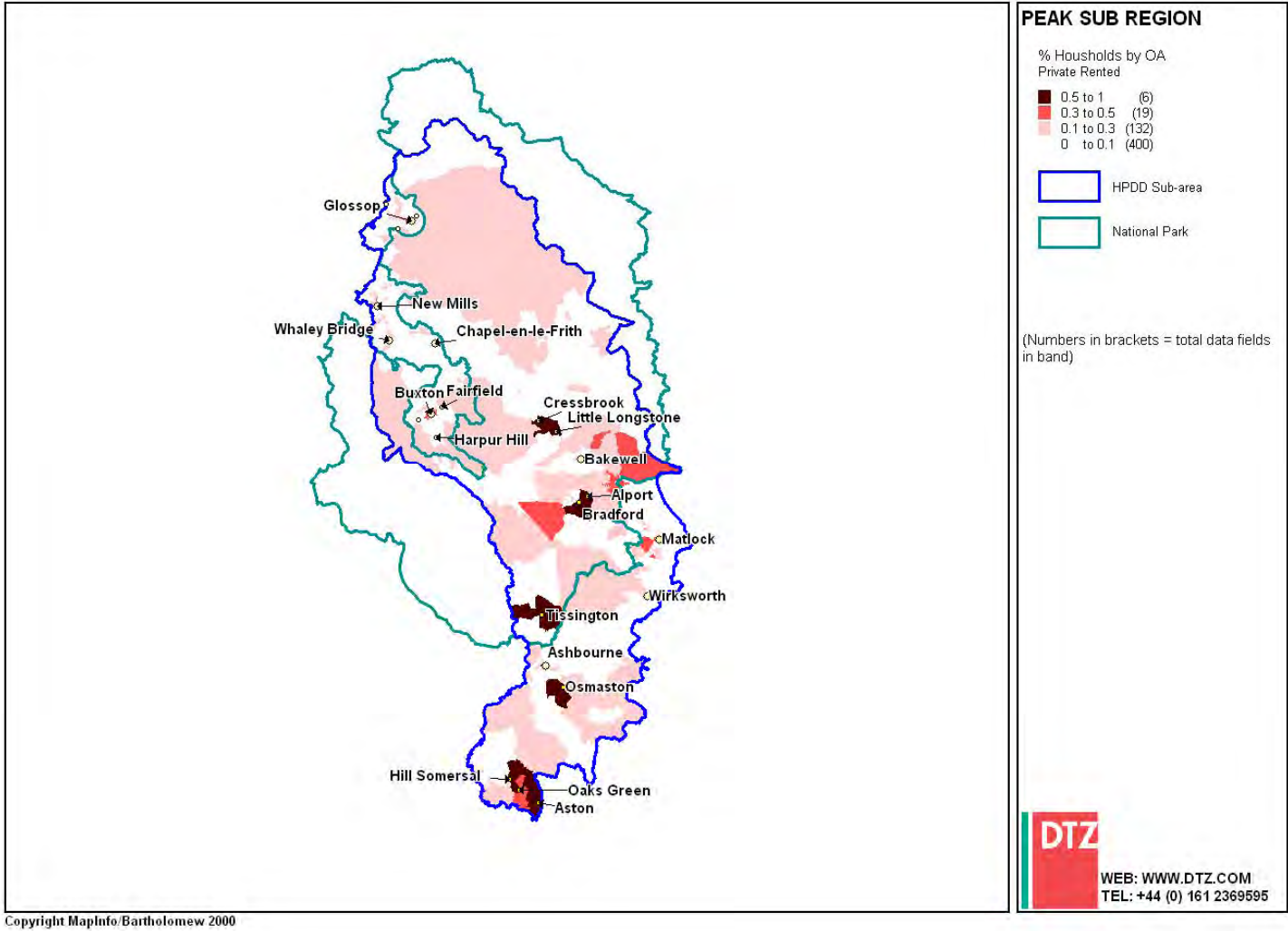
- 4.34 Figures 4.12, 4.13 and 4.14 illustrate the spatial distribution of households by tenure across the study area. There are three separate maps for the proportion of households in owner occupation, private rented and social rented housing.
- 4.35 Figure 4.12 illustrates that across the study area, the parts of the sub-area bordering Greater Manchester exhibit the highest levels of owner occupation. There are other pockets of high levels of owner occupation, including parts of the sub-region close to Sheffield.
- 4.36 Figure 4.13 indicates that there are a number of areas across the HPDD Sub-Area where there is a significant proportion of private rented accommodation. These areas tend to be in more rural locations. The areas and settlements which have a high proportion of private rented accommodation are Cressbrook, Little Longstone, Bakewell, Alport, Bradford, Tissington, and Osmaston. This pattern may have changed since 2001, with the growth of private renting associated with the Buy-to-Let phenomenon.
- 4.37 Figure 4.14 illustrates the extremely limited number of areas that have a high level of social renting across most of the sub-area compared with the rest of Derbyshire. There are a number of dispersed areas across the sub-area that have over 40% of households in social rented accommodation and, as expected, these tend to be in the urban settlements, such as Glossop, Buxton and Matlock.

Figure 4.12: Proportion of Households in Owner Occupation



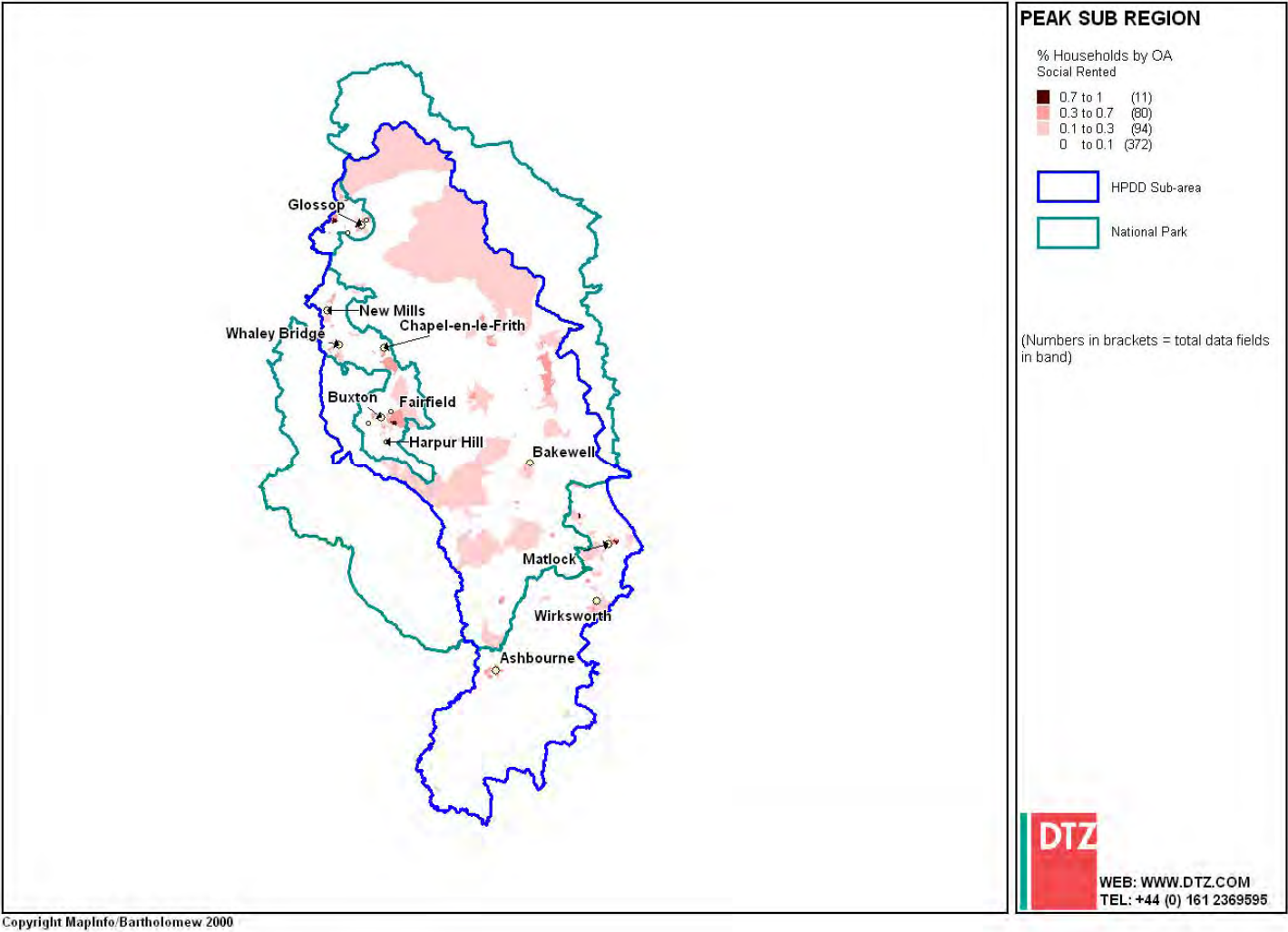
Source: Census 2001

Figure 4.13: Proportion of Households in Private Rented Sector



Source: Census 2001

Figure 4.14: Proportion of Households in Social Rented Sector

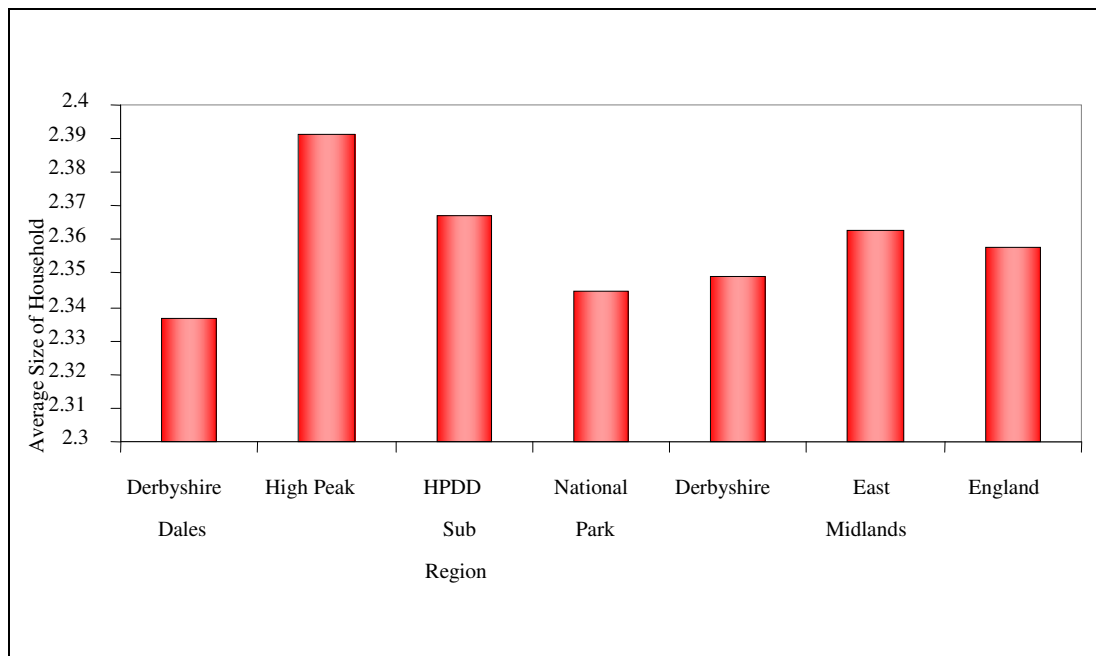


Source: Census 2001

Household Size

- 4.38 Understanding trends in household size and the number of households are crucial in determining the demand for future housing. Future changes in the number of households will be determined by increases in population and the extent to which an area follows national trends in reducing average household size. This also has implications for the size of property that will be required to house the population of an area in the future.
- 4.39 Figure 4.15 shows the average number of people per household in the study areas. The Derbyshire Dales and the National Park show a low number of people per household compared with England, the East Midlands and Derbyshire. The number of people per household is higher for the High Peak area. This area is higher than all the comparator areas and pushes the number of people per household for the HPDD Sub-Area above the national and regional averages.

Figure 4.15: Average Number of People per Household Space

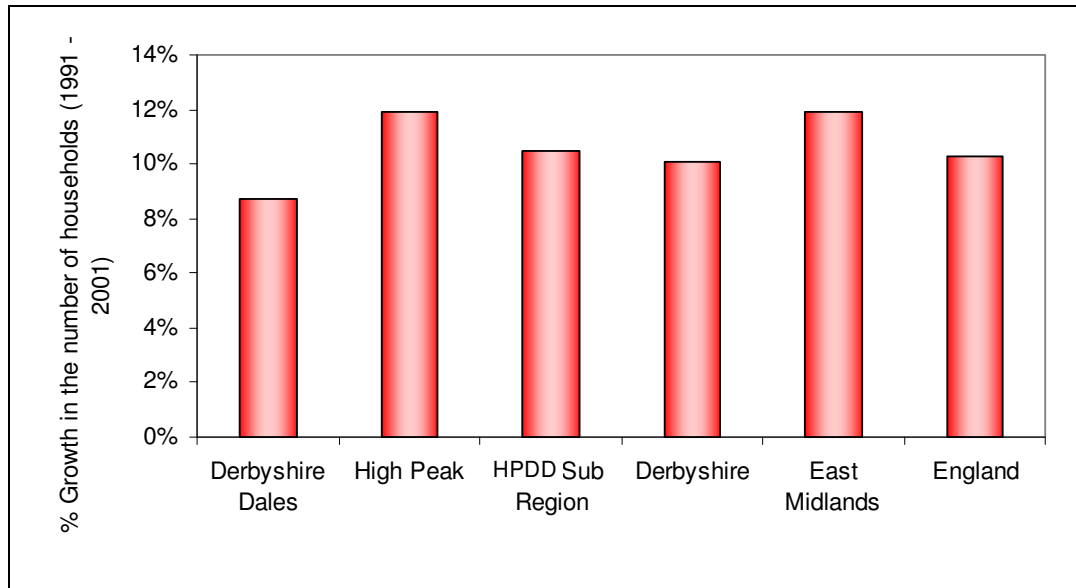


Source: Census 2001

Household Growth

- 4.40 Figure 4.16 shows the change in the number of households between 1991 and 2001 for the study areas. The High Peak area shows a high increase in the number of households and is comparable to the regional average. However, Derbyshire Dales has seen a smaller increase in the number of households, a figure of just over 8%, being lower than the comparator areas.

Figure 4.16: Percentage Change in Number of Households 1991-2001



Source: 1991 and 2001 Census

- 4.41 Table 4.9 outlines the household growth between 1991 and 2001 in absolute terms. It shows that the number of households in the HPDD Sub-Area has increased by 6,270, with a large proportion of this increase attributable to the High Peak area (3,941). The overall conclusion is that the growth rate of the High Peak area is greater than Derbyshire Dales and the National Park.

Table 4.9: Household Growth 1991-2001

	1991	2001	Household Growth	% Change
Derbyshire Dales	26,736	29,065	2,329	8.7%
High Peak	33,123	37,064	3,941	11.9%
HPDD Sub-Area	59,859	66,129	6,270	10.5%
Derbyshire	280,585	308,867	28,282	10.1%
East Midlands	1,547,985	1,732,482	184,497	11.9%
England	18,545,529	20,451,427	1,905,898	10.3%
PDNPA	15,132 ⁸	15,949	817	5.4%

Source: 1991 and 2001 Census

- 4.42 A full analysis of the economic drivers of housing demand is undertaken in the next section of this report.

⁸ 1991 Census household numbers in PDNPA is an estimate

Population Projections

- 4.43 The ‘policy based’ population projections produced by EMRA presented in Table 4.10 suggest a significant slowing of population growth within High Peak and a steady decline in population within Derbyshire Dales. These projections take into account future housing allocations presented in the draft RSS. Guidance produced by EMRA in November 2006 indicates that the ‘policy base’ should be used in the preparation of the SHMA, whilst the CLG suggests that ONS figures should be used. Both are presented in this report.

Table 4.10: EMRA Population Growth Projections 2001 to 2026

	Population Projections						%
	2001	2006	2011	2016	2021	2026	Change 2001 to 2026
High Peak	89,000	89,100	89,300	89,300	89,800	90,800	2%
Derbyshire Dales	69,400	69,100	68,700	67,700	66,600	65,800	-5%
HPDD Sub-Area	158,400	158,200	158,000	157,000	156,400	156,600	-1%
Derbyshire	734,700	748,600	762,800	774,100	787,500	806,200	10%
East Midlands 000's	4,190	4,321	4,440	4,555	4,687	4,845	16%
England (ONS) 000's	49,139	50,976	52,223	53,544	54,861	56,044	14%

Source: EMRA, 2006

- 4.44 The Policy Based projections suggest that overall population living in the HPDD Sub-Area is projected to decline by around 1,800 persons over the next 25 years. This change is within the context of population growth of 10% across Derbyshire and 16% across the East Midlands. This decline across the HPDD Sub-Area masks the difference between the two districts, with High Peak expected to experience an increase in population of 1,800 persons, while Derbyshire Dales is expected to decline by some 3,600 people.
- 4.45 The ONS Population Projections based on 2004 population estimates represent unadjusted projections based on population change in previous years. These projections presented in Table 4.11 illustrate that without constraints, population in the Sub-Area would probably grow at a rate significantly above that suggested by the policy based projections. The implication of a policy of constraint, with the underlying pattern of demand and captured by the ONS projections, is that the HPDD Sub-Area can expect to experience excess demand for housing that will manifest itself in rising prices, and therefore exacerbated affordability problems.

Table 4.11: ONS Population Growth Projections 2001 to 2026

	Population Projections						%
	2001	2006	2011	2016	2021	2026	Change
High Peak	89,000	91,400	93,300	95,300	97,400	99,400	12%
Derbyshire Dales	69,400	70,000	70,500	71,200	72,200	73,200	5%
HPDD Sub-Area	158,400	161,400	163,800	166,500	169,600	172,600	9%
Derbyshire	734,700	752,400	768,300	785,300	803,000	818,500	11%
East Midlands 000's	4,190	4,335	4,458	4,580	4,703	4,817	15%

Source: ONS

4.46 The Office for National Statistics has not produced population projections for the Peak District National Park. As a result, the National Park Authority, with the support of the East Midlands Regional Assembly, commissioned the University of Manchester to produce a range of population projections. These projections were published in November 2006 using similar data and approaches to those used by government agencies. The projections present a range of scenarios, including a number of scenarios based on different levels of dwelling completions per annum. The following table illustrates the range of scenarios presented.

Table 4.11: Peak District National Park Population Projections 2001 to 2026

		Population Projections					%	
		2001	2006	2011	2016	2021	2026	Change 2001 to 2026
Census based Projection	35,157		34,988	34,283	33,067	31,501	29,776	-15.3
Natural Change			34,496	33,800	33,239	32,772	32,197	-8.4
Zero Net Migration			34,425	33,324	32,024	30,591	28,981	-17.6
0 dwellings p.a.			34,335	33,386	32,322	31,205	30,296	-13.8
48 dwellings p.a.			34,937	34,570	34,044	33,411	32,948	-6.3
95 dwellings p.a.			35,527	35,731	35,737	35,582	35,559	1.1
150 dwellings p.a.			36,219	37,095	37,730	38,141	38,634	9.9

Source: Population, household and labour force projections for the Peak District National Park Authority and East Midlands Regional Assembly, CCSR, University of Manchester 2006

Note: Only includes projections relating to population in High Peak and Derbyshire Dales Districts

4.47 The projections present several messages for the National Park:

- Firstly, due to the age of the current population living in the National Park and the trend towards smaller households, two of the scenarios suggest population decline over the long term and a third (95 dwellings pa) in a steady state. A moratorium on new house building could result in population decline of 13.8% over 25 years to 2026.
- Only scenarios that reflect average annual dwelling completions in excess of around 95 dwellings result in significant population growth from 2001 to 2026.
- The scenario where migration rates are balanced reveals the strong future reliance on in-migration to the National Park required to sustain the level of population. The forecasts suggest that if in-migration into the Park is not sustained then population levels could fall by some 20%.

Household Projections

4.48 Household projections prepared on behalf of EMRA are based on recent demographic trends and the housing allocations set out in the draft RSS. Overall, within the HPDD Sub-Area, the projections suggest that the number of households is expected to increase by an average of 460-480 per annum. This growth within the context of declining population can be explained through changing assumptions about the number of persons per household, with the average household size anticipated to decline (from around 2.4 persons per household in 2001 to around 2.0 persons per household in 2026).

4.49 Table 4.13 outlines the projected household growth pattern in absolute terms for the study areas. The total number of households in the HPDD Sub-Area is predicted to increase by

14,000 by 2026, of which 8,000 of these households will be within the High Peak area and 6,000 within the Derbyshire Dales. The increase in households for the HPDD Sub-Area accounts for 18% of the projected increase within Derbyshire and 3% of the projected total increase within the East Midlands.

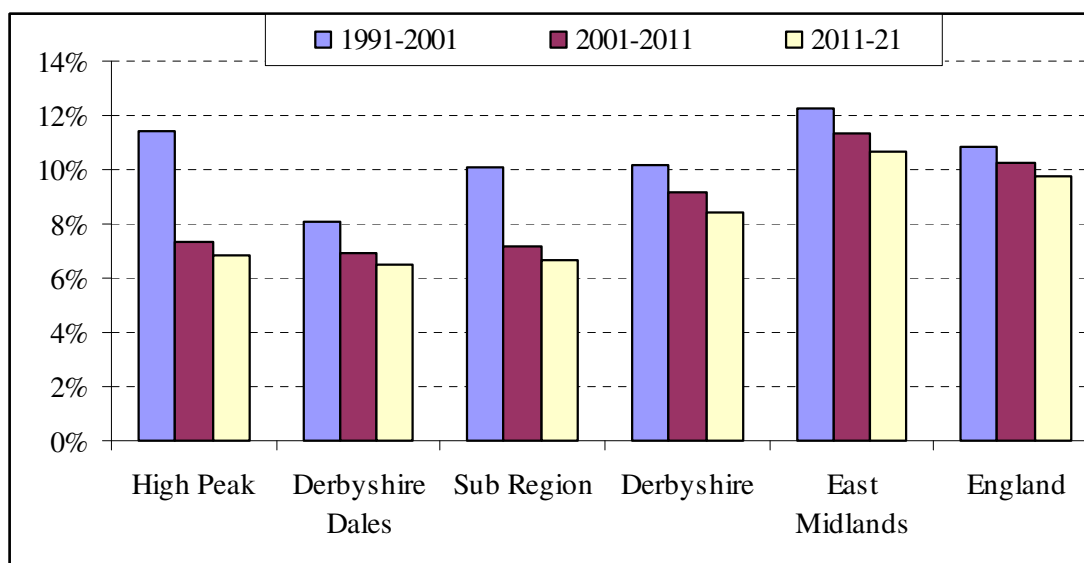
Table 4.13: Absolute Household Growth Projections 2001 to 2026

	Household Projections						%
	2001	2006	2011	2016	2021	2026	Change 2001 to 2026
High Peak	36,900	38,300	39,600	41,000	42,300	43,700	18%
Derbyshire Dales	28,900	29,900	30,900	31,900	32,900	33,900	17%
HPDD Sub-Area	65,900	68,200	70,600	72,900	75,300	77,600	18%
Derbyshire	309,000	323,100	337,300	351,500	365,800	380,000	23%
East Midlands 000's	1,737	1,834	1,934	2,038	2,141	2,244	29%
England (ONS) 000's	20,500	21,500	22,600	23,700	24,800	25,700	26%

Source: 2001 Census / EMRA Population Projections

- 4.50 A comparison between historical household growth and forecast growth is shown in figure 4.17. Overall, all areas are expected to experience a slower rate of household growth in the future compared with the period 1991-2001. The HPDD Sub-Area is expected to experience a more significant slowdown in household growth than is expected in the benchmark areas. This is primarily driven by the significant slowdown expected within High Peak, with growth predicted to fall from the 11% experienced between 1991-2001 to 7% between 2001-2011 and 2011-2021. Derbyshire Dales is predicted to have a relatively low rate of growth from 2001 onwards, but this is expected given the low growth rate between 1991 and 2001.
- 4.51 As expected, household growth in Derbyshire, the East Midlands and England is estimated to increase at a faster rate than the Derbyshire Dales and High Peak.

Figure 4.17: % Household Growth – Past and Future



Source: 1991 and 2001 Census / EMRA Population Projections

4.52 As with population projections, neither EMRA nor DCLG produce household projections for the National Park. The results of the work commissioned by the National Park Authority suggest that additional dwellings built within the National Park will be occupied by additional households, as a result of the high demand for dwellings in the National Park. Therefore, the increase in households in the Park is directly related to the level of house building. A key issue is that the relationship between increasing household numbers and population is not linear. Although household numbers are expected to increase under most scenarios (with the exception of zero migration and no new dwellings), population levels are expected to decline unless the rate of new building of around 95 dwellings p.a. is achieved over the 25 years to 2026

Table 4.13: Peak District National Park Household Projections 2001 to 2026

	Household Projections						% Change 2001 to 2026
	2001	2006	2011	2016	2021	2026	
Census based Projection	14,835	15,085	15,183	14,979	14,979	14,669	-1.1
Natural Change		14,751	14,822	15,229	15,229	15,193	2.4
Zero Net Migration		14,876	14,817	14,639	14,639	14,400	-2.9
0 dwellings p.a.		14,835	14,835	14,835	14,835	14,835	
48 dwellings p.a.		15,058	15,281	15,727	15,727	15,950	7.5
95 dwellings p.a.		15,276	15,718	16,601	16,601	17,043	14.9
150 dwellings p.a.		15,532	16,229	17,624	17,624	18,322	23.5

Source: Population, household and labour force projections for the Peak District National Park Authority and East Midlands Regional Assembly, CCSR, University of Manchester 2006