

DERBYSHIRE COUNTY COUNCIL

CABINET MEETING

5 August 2014

Report of the Strategic Director – Economy, Transport and Environment

**DERBYSHIRE ECONOMIC REVIEW – JUNE 2014
(JOBS, ECONOMY AND TRANSPORT)**

(1) **Purpose of the Report** To present the latest Quarterly Economic Review (June 2014) to Cabinet and provide an overview of the current economic conditions within Derbyshire.

(2) **Information and Analysis**

Background

The attached Derbyshire Economic Review (Appendix 1) is part of a rolling programme of quarterly economic updates provided as a 'highlight report' for use by elected members to support broader discussions and policy development work. The Review is undertaken by the Council's Policy and Research Division (Chief Executive's) and summarises key economic trends and activity using information from the Derbyshire Observatory. Each quarterly report spotlights a key economic issue; for this quarter, the focus is young people and the labour market.

The Review also enables the Council to support and facilitate the delivery of partnership activity, most notably through the Derbyshire Economic Partnership (DEP), the Local Transport Board and the D2N2 (Derby, Derbyshire, Nottingham and Nottinghamshire) Local Enterprise Partnership (LEP).

Summary of Key Findings

The following paragraphs provide a brief overview of the key issues from the June 2014 Review.

Since the previous Quarterly Review, and within a national context of quarter on quarter growth (fifth consecutive):

- Derbyshire's economic performance improved in quarter 1 of 2014, building on the strong performance of the previous year. Strong UK and

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export sales and orders are key factors.

- Claimant unemployment – whilst the Derbyshire figure is slightly lower than the England average, pockets of concern exist around Gamesley and areas of Chesterfield, Ilkeston and Buxton.
- Long-term unemployment seems to be levelling out but is still high and remains a significant concern. Similarly, youth unemployment rates are falling but still an issue, particularly in certain areas of the County e.g. Chesterfield, Bolsover and Erewash (NB: in 15 out of 177 County wards, youth unemployment is more than double the national average).
- Good news on job creation continues and includes the creation of 80 apprenticeships at Bombardier in Derby, more staff at Collstream and the opening of Euro Garages at Markham Vale.
- There are also signs of confidence returning to the housing market locally with house prices having been on the rise since the summer of 2013. Average house prices in the County (£124,000) remain significantly lower than the national average (£169,000), but given the lower levels of household income, this is not of significant concern.

In Focus: Young People and the Labour Market

Although the level of young people not in education, employment or training (NEET) locally (4.4%) has fallen below the national level (4.7%) for the first time in a number of years, there are wide disparities across the County. For example, in part of Ilkeston Central ward in Erewash, 29.9% of young people are NEET, however, there are some parts of the County where no 16-18 year olds are NEET. Each district authority has at least one area where this is the case.

Research carried out by the UK Commission for Employment and Skills highlighted that in 2013, the County fared better on how well prepared employers felt young people were for work.

The trend on GCSE attainment is also positive; data for 2013 shows 59.1% of young people in Derbyshire achieved five GCSEs A*-C including English and Maths. Whilst this is an increase on the previous year's performance of 57.2%, Derbyshire's performance last year was still below the national average of 59.2%.

Implications

To help ensure that young people are able to enter and progress in the labour market, the Council is implementing a number of actions, including the following:

- Delivering the implementation plan to support the Raising Participation Age (RPA) legislation which, from 2015, will require young people to study or train up to the age of 18.

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- Producing an Employment Strategy for Young People to improve jobs, education and training prospects. This work will specifically draw in new intervention for engaging with employers and other providers to deliver effective career advice to young people; will expand the apprenticeship and traineeship schemes and will look to support better engagement with schools and employers on promoting quality pathways to work.

These interventions will help ensure that young people are ready for work and have the qualifications, knowledge and skills to be able to find employment and progress in the workplace. They will also ensure that skills and careers advice are focused on supporting the key sectors of Derbyshire's economy, using the recently approved Derbyshire Economic Strategy Statement (DESS) to set the framework for action.

(3) **Financial Considerations** There are no financial considerations associated with this report.

(4) **Equality and Diversity Considerations** The analysis highlights that there are some areas of the County where the educational attainment of young people is relatively low. This is potentially a barrier to entering the labour market so it is important the Council works with other partners to enhance the potential of those particular young people. The June 2014 Review highlights some examples of actions that will help to address inequality in achievement; other specific actions will be identified in the Employment Strategy for Young People, the DESS Implementation Plan, both of which are currently being developed.

In preparing this report, the relevance of the following factors has been considered: legal, prevention of crime and disorder, human resources, environmental, health, property and transport considerations.

(5) **Key Decision** No.

(6) **Call-In** Is it required that call-in be waived in respect of the decisions proposed in the report? No.

(7) **Background Papers** Appendix 1 – Derbyshire Economic Review (June 2014). All relevant background papers are held within the Policy and Research Division. Officer contact details - Mick Evans, extension 38474.

(8) **OFFICER'S RECOMMENDATION** That Cabinet notes the information presented within the Derbyshire Economic Review (June 2014) and that the findings be used to support broader discussions and policy development work.

Mike Ashworth
Strategic Director – Economy, Transport and Environment

Policy and Research, Chief Executive's

Derbyshire Economic Review - June 2014

Introduction

This review aims to give a brief overview of the latest statistics and news on the Derbyshire¹ economy both in a national and local context. The report provides a “snapshot” of the Derbyshire economy, to help inform the development and delivery of future economic strategies in the area. It is primarily based on evidence available from the Derbyshire Observatory, which aims to be a single information source for partners and organisations across the county. The update also provides information on an ‘In focus’ topic, in this edition: Young People and the Labour Market.

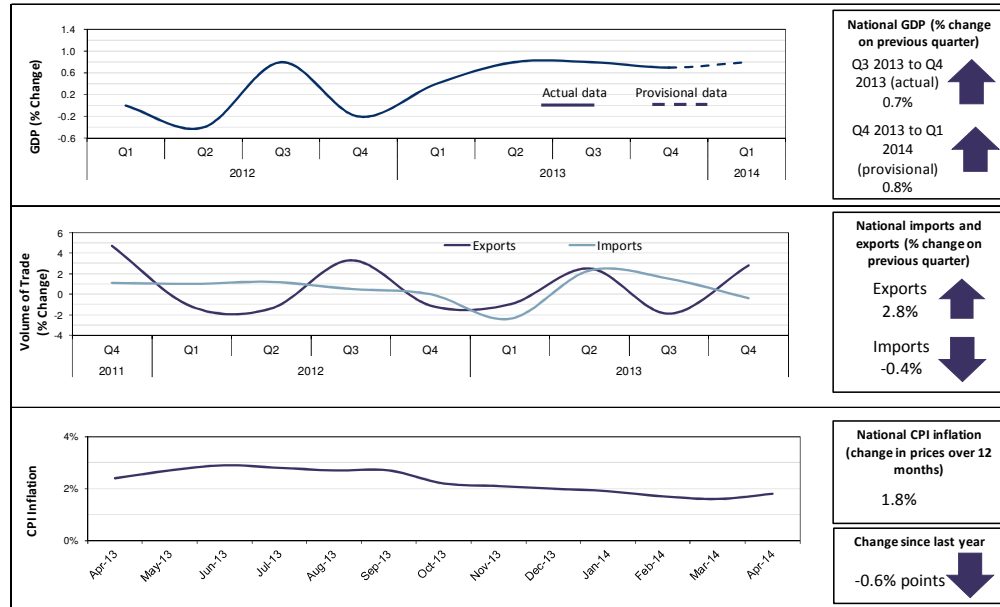
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Overview

- Nationally, economic growth provisionally increased by 0.8% between quarter 4 of 2013 and quarter 1 of 2014. This is the fifth consecutive quarter of growth and demonstrates that an economic recovery now appears to be underway. Of the four main industrial groupings within the economy (agriculture, production, construction and services) only agriculture (-0.7%) saw a decline.
- The Consumer Prices Index (CPI) inflation rate monitors changes in the price of goods and services purchased by households. The annual CPI rate stands at 1.8% for the 12 months to April 2014, up 0.2% points from March 2014, just below the national target of 2.0%.
- The momentum built within the Derbyshire economy during 2013 has continued into the first quarter of 2014 according to the Derbyshire, Nottinghamshire and Leicestershire Chamber of Commerce's State of the Economy Index, narrowing the gap in performance with the East Midlands, driven by improved UK and export sales and orders.
- The county has above average levels of labour market participation with an employment rate of 75.7% compared with 71.7% for England in December 2013.
- In April 2014, the overall claimant count unemployment rate was lower in Derbyshire (2.1%) than England (2.7%), although hotspots exist across the county where unemployment levels are severely high, e.g. Rother and St Helens in Chesterfield and Ilkeston North in Erewash.
- 27.7% of all unemployment claimants in Derbyshire have been out of work for more than a year, slightly less than the national average (29.7%).
- Youth unemployment in Derbyshire stands at 3.7%, marginally higher than the England rate of 3.5%. In 15 out of the county's 177 wards, the problem is particularly acute where the level of youth unemployment is more than double the national rate.
- Derbyshire has seen improvements to two important indicators relating to young people, the proportion who are NEET and the level of achievement at GCSE. However, on both measures there are wide disparities across the county.

National Performance Indicators



According to provisional data, national Gross Domestic Product (GDP), an indicator of economic growth, is estimated to have increased by 0.8% between quarter 4 of 2013 and quarter 1 of 2014². GDP for three of the four main industrial groupings (construction, production and services) increased in quarter 1 of 2014, whereas output in agriculture decreased by -0.7%.

The largest contribution to GDP growth is from the service sector, with output from services contributing 0.7% to the increase in GDP. Output in the service sector is now 2.0% higher than in quarter 1 of 2008 prior to the economic downturn. Production has also shown strong growth, constituting 0.1% of the GDP increase, although output still remains 11.5% below its pre-economic downturn peak in quarter 1 2008.

The volume of trade for exports increased by 2.8% in quarter 4 of 2013 whilst there was a decrease of -0.4% in imports³. The net trade deficit has almost halved from £8.0billion in quarter 3 to £4.2billion in quarter 4, with net trade making its largest contribution to GDP growth for two years. Improvement in the export of services has

been an important factor in this, rising by 5.5%, with financial services particularly prominent.

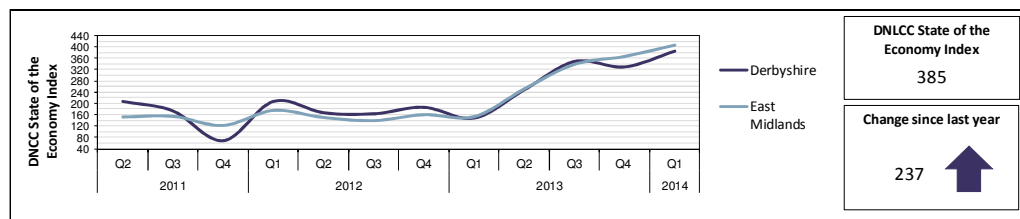
The annual CPI inflation rate currently stands at 1.8% for the 12 months to April 2014, up from 1.6% in March 2014⁴. Increases in transport costs, notably air fares, sea fares and motor fuels, provided the largest contribution to the rise in the rate. An overall fall in the price of food was the largest offsetting factor. This is the first time since June 2013 that the CPI rate has increased and continues the trend seen since Autumn 2013 of the CPI being in the region of 2.0% which is the Bank of England's target.

The Bank of England interest rate remains at 0.5%⁵ but the Bank of England has hinted that if the economic recovery continues it may need to increase interest rates in the middle of 2015. However, the Confederation of British Industry recently said that interest rates may need to rise earlier to offset the impact of the UK's accelerating housing market. The Bank of England highlighted the following national trends as at April 2014⁶:

- Annual growth in the value of retail sales has eased, with growth in consumer services turnover little changed.
- Housing market transactions have continued to rise strongly.
- Investment intentions have continued to strengthen.
- Growth in business services turnover has increased, largely due to rising activity among professional and financial services firms.
- Growth in manufacturing output has picked up further, both for the domestic market and for export.
- Growth in construction output has remained robust, led by house building.
- Corporate credit availability has continued to ease, though it remains tight for small companies.
- Employment intentions have edged up further and recruitment difficulties have remained slightly above normal.

More information can be found at: <http://www.bankofengland.co.uk/publications/Pages/agentssummary/default.aspx>

Business Conditions



The Derbyshire economy continues to build on the strong performance seen in 2013, according to the Derbyshire, Nottinghamshire and Leicestershire Chamber of Commerce's (DNLCC) most recent Quarterly Economic Survey⁷ with Q1 2014 seeing a consolidation of the recovery shown over the last year. Businesses in Derbyshire appear to be playing their part in the continued strengthening of the national economy, with strong sales and increased orders in both UK and export markets leading the way. The level of activity in export markets does, however, remain below that regionally and given the importance, in the 2014 Budget placed on the UK selling overseas to help correct the trade imbalance this is an issue that merits consideration. Business confidence for the year in Derbyshire is high though and encouragingly there has been an increase in the number of firms planning to recruit over the next quarter and invest in training.

Investment

The Derbyshire Economic Partnership received a total of 6 enquiries from firms seriously looking to invest in the county⁸ between February and April 2014, down on the 17 enquiries received in the previous quarter. There was also a dip in enquiries in the same quarter last year so this may reflect seasonality in the level of investment activity by businesses. Investment and job creation in the county is important to Derbyshire's future economic growth. Businesses looking to locate in the county can access a range of support through the [Invest in Derbyshire](#) website, supported by D2N2 and UK Trade & Investment (UKTI).

Job Losses and Gains

The following job losses and gains information relates to organisations in Derbyshire (including Derby City), and is drawn from articles in the local press between February and April 2014.

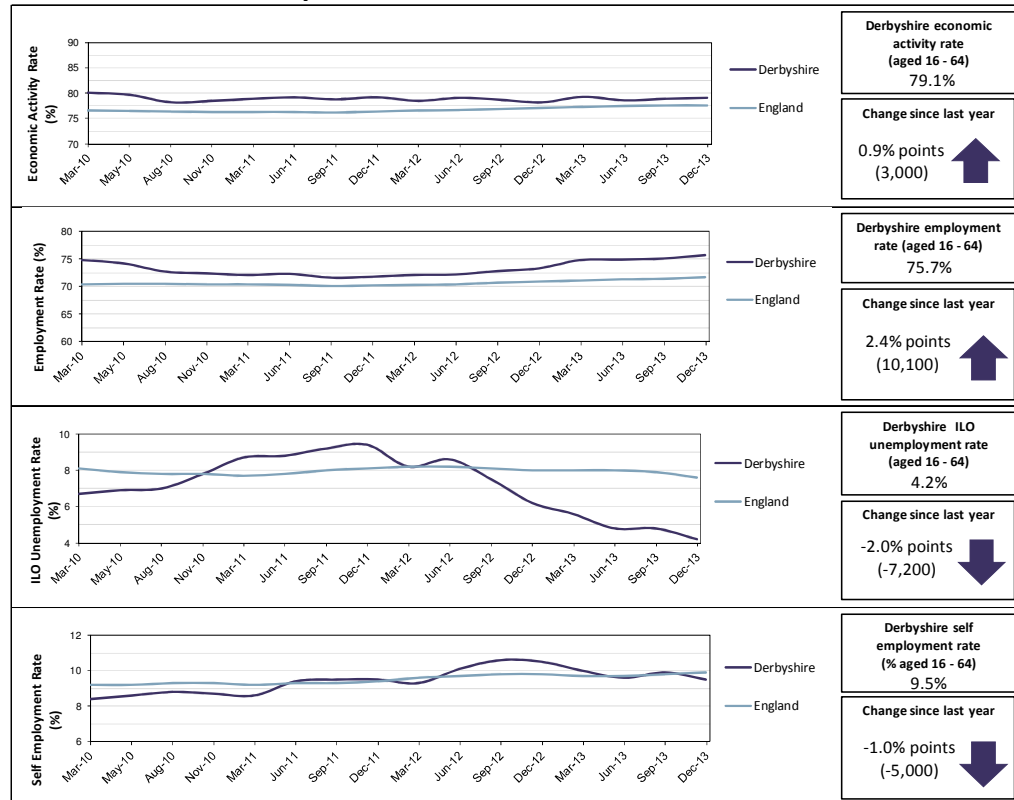
Job Losses

- Sandvik Construction announced in February 2014 that it is to cease production at its Swadlincote site. The decision is to affect 360 jobs, 160 of which will be transferred to the firm's Northern Ireland plant.
- At the beginning of March, Joy Mining Machinery announced plans to shut its Alfreton site and transfer services to sites in Worcester and Wigan, with the potential loss of 70 jobs.

Job Gains

- In February 2014, Derby train builder Bombardier UK won a £1bn Crossrail contract, safeguarding 1,500 jobs at the plant and leading to the creation of 80 apprenticeships.
- In April, Hewlett Packard announced a ten-year deal to relocate dozens of employees to a vacant office on Derby's Pride Park.
- Derby-based telecommunications firm Collstream announced in April that it has invested £1.4 million in a building on Pride Park with a view to taking on dozens of new staff.
- Forecourt operator Euro Garages is to open a site at Markham Vale in Spring 2014 creating around 60 jobs.
- George Utz Ltd UK is to invest £3.5m in the expansion of its plastic containers factory in Alfreton in 2014 which will lead to the creation of up to 40 jobs.
- In February the homeware and DIY retailer Boyes announced that the opening of a new store in Chesterfield will create around 30 jobs.
- Wildgoose Construction announced in February plans to move its base to Alfreton to allow for expansion that will add 10 more staff.

Labour Market Participation



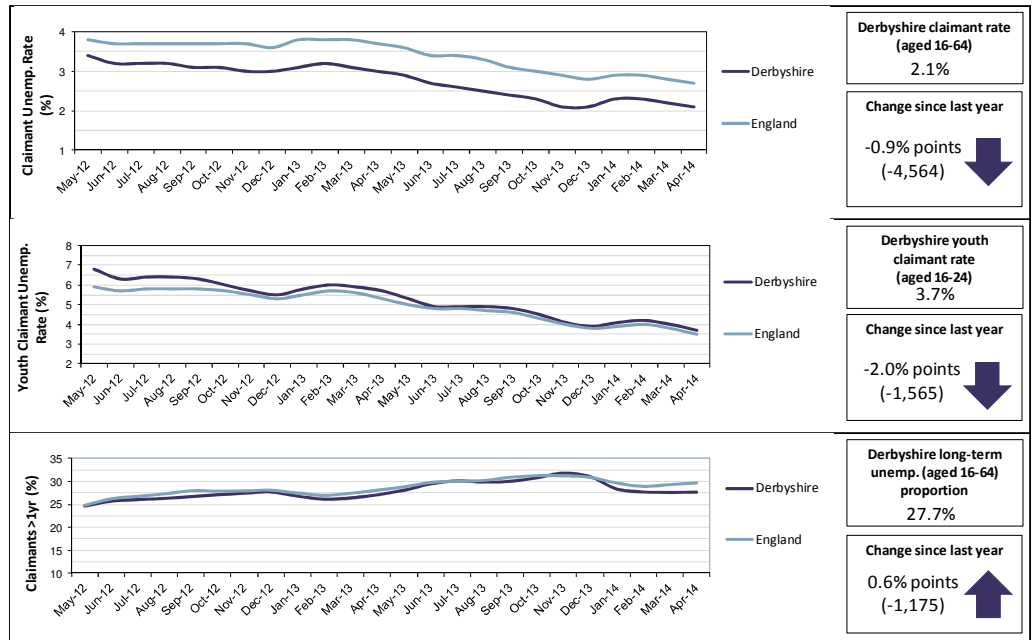
Source: Annual Population Survey, January 2013-December 2013, ONS (Nomis) © Crown Copyright.

The county has above average levels of labour market participation. The economic activity rate in Derbyshire is currently 79.1%⁹, higher than the national rate of 77.6%. Employment within the county has risen by 2.4% points since last year and at 75.7%¹⁰, remains higher than the national average (71.7%).

International Labour Organisation (ILO)¹¹ unemployment is regarded as the official measure of unemployment. It has a much wider definition than the monthly claimant count of unemployment and includes people who are out of work and claiming Job Seekers Allowance (JSA) as well as those who are actively looking for work but not necessarily claiming unemployment related benefits. It can therefore produce different levels and patterns of unemployment to the claimant count.

In December 2013, the ILO unemployment rate in Derbyshire stood at 4.2%, 3.4% points lower than the England rate. Locally there has been a sharp decline of -2.0% points in the rate over the last year, compared to a slight decrease nationally of -0.4%, suggesting that the county's economy is recovering at a faster rate.

Over the last 12 months self employment levels have fallen, with the number of working-age self employed people in Derbyshire decreasing by 5,000 (-1.0% points) to stand at 9.5%, slightly lower than the level of 9.9% for England.



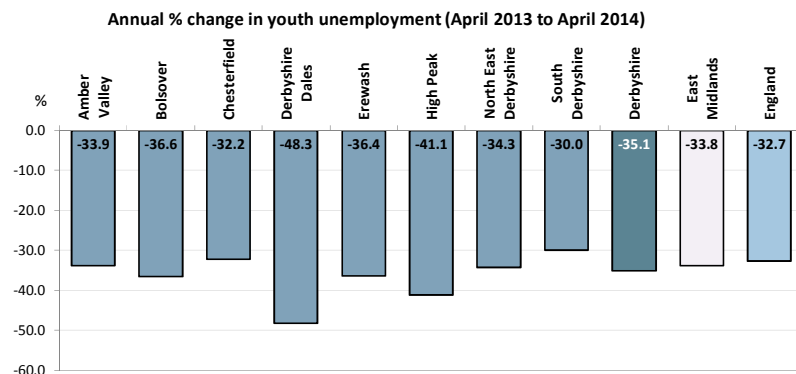
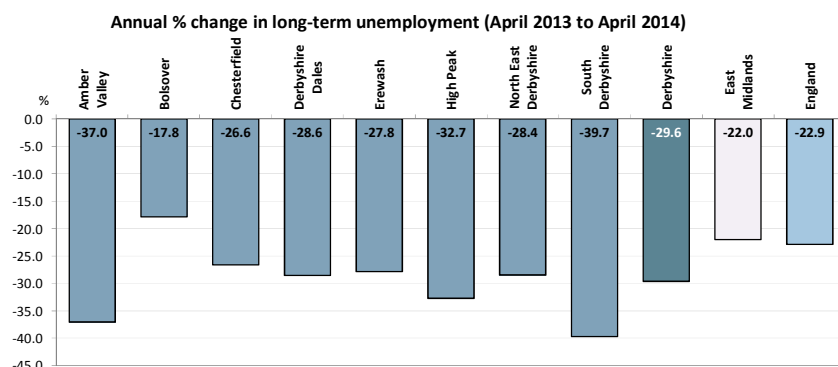
Source: Claimant Count, April 2014, ONS (Nomis) © Crown Copyright.

The overall claimant count unemployment rate is based on a count of all people claiming Job Seekers Allowance. In Derbyshire the rate is currently 2.1%, lower than the England rate of 3.0%¹². Since the early part of 2012, claimant count unemployment has been generally decreasing, with the level of decline greater in Derbyshire than nationally. However, hotspots exist across the county where unemployment levels are particularly high, including the wards of Rother and St Helens in Chesterfield, Ilkeston North, Cotmanhay and Ilkeston Central in Erewash, and Barms and Gamesley in High Peak.

Labour Market

27.7% of the county's unemployment claimants have been out of work for more than a year, a higher proportion than this time last year (27.1%). The general upward trend in long-term unemployment has stabilised, with the figures for the last three months remaining steady. The number affected, however, has fallen by 1,175 since April 2013. The increase in proportion but fall in number over the last year is because overall unemployment has decreased faster than long-term unemployment.

Analysis by district can highlight which areas are contributing most to the changes county-wide. All districts have shown a decrease in the number of people who have been unemployed for over a year in the last 12 months. The greatest annual percentage decline is shown by South Derbyshire (-39.7%) and the lowest by Bolsover (-17.8%). All districts have rates of decrease larger than the East Midlands



Source: Claimant Count, April 2014, ONS (Nomis) © Crown Copyright.

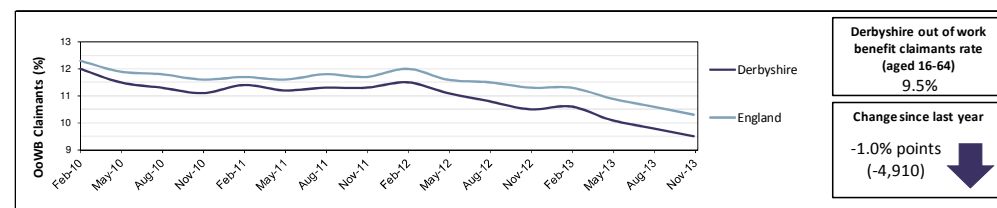
Derbyshire Observatory Link: <http://tinyurl.com/lea2012-unemp>

Labour Market

and England expect for Bolsover.

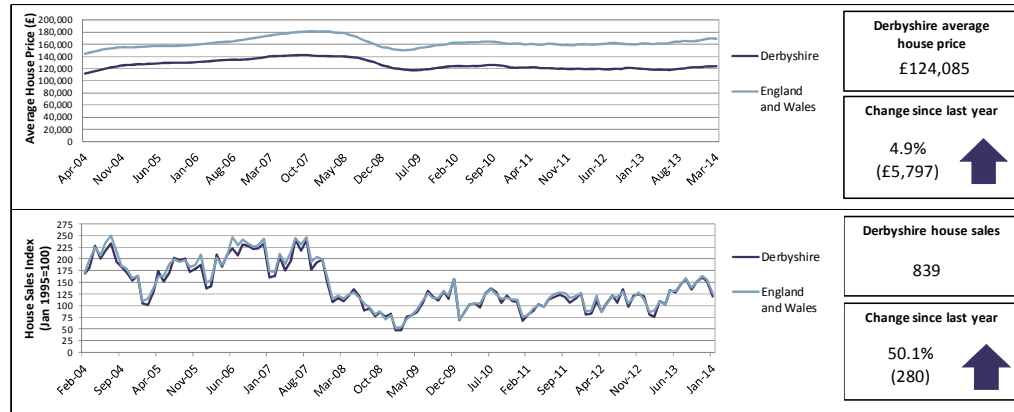
Since the early part of 2012, youth unemployment levels both locally and nationally have generally declined, particularly for the county, so that Derbyshire's youth unemployment rate (3.7%) is now only marginally higher than the national average (3.5%)¹³. Over the last year, all districts have shown a decline in youth unemployment levels, but the greatest annual percentage decline is within Derbyshire Dales (-48.3%) and the lowest in South Derbyshire (-30.0%).

It would seem that the improving economic output nationally and locally is beginning to feed through to youth unemployment levels in the county. However, the rate of youth unemployment in the county still remains nearly double the total unemployment rate so as the economic recovery takes hold it is important that young people continue to be helped in their transition into the labour market. Derbyshire County Council is looking to expand its apprenticeships scheme and this will make a contribution.



Derbyshire Observatory Link: <http://tinyurl.com/lea2012-owwbc>

According to the latest data, 4,910 fewer Derbyshire residents (9.5%) are claiming an Out of Work Benefit (OoWB)¹⁴ than a year ago, a lower percentage than the England average of 10.3%¹⁵. Across Derbyshire the number of claimants varies considerably, in particular there are seven wards where more than 20% of the working-age population are claiming an OoWB. These are Gamesley in High Peak, Rother, Middlecroft and Poolsbrook, and Loundsley Green in Chesterfield, Ilkeston North in Erewash, and Shirebrook North West and Shirebrook East in Bolsover. It is too early to tell if there has been an impact from the recent changes to the benefits system.



Source: House Price Index, Land Registry, March 2014, © Crown Copyright.

Following a period of relatively stability since the economic downturn, house prices have risen since the summer of 2013, indicating a returning confidence to the housing market. According to the Royal Institution of Chartered Surveyors, housing demand nationally is outstripping supply, with the number of homes coming onto the market having fallen for four months in a row, putting upward pressure on prices. Average house prices in the county are consistently lower than the national average with the average price of a house in Derbyshire currently £124,085 compared with £169,124 for England and Wales¹⁶. Although the gap between Derbyshire and England and Wales has widened in the last quarter with house prices rising by 4.9% in Derbyshire since last year, compared with 5.6% across England and Wales, the differential is less than for the previous quarter. Across the country Greater London is still leading the way, with prices rising by 12.4% over the last year.

According to the latest figures, there were a total of 839 property transactions in the county in January 2014. This is an increase of 50.0% on the previous year, higher than the national figure of 45.5%, indicating that the housing market is beginning to move. However, it is well below the figure of 1,117 transactions in January 2007 prior to the recession.

Young people and the labour market

Young people make an extremely significant contribution to the performance of Derbyshire's economy. The economic downturn has presented challenges for many, not least young people, and a well-qualified and work ready young workforce is important in enabling economic recovery. This spotlight draws together some of the latest information related to young people and the labour market.

A recent report by the Office for National Statistics¹⁷ provides useful context. Over the past 30 years, the proportion of young people in full-time education in the UK has more than doubled, however, the proportion of young people undertaking work alongside full-time study has been falling since a peak of 41.4% in 2000, to stand at 26.8% in 2013. This has implications for businesses wishing to recruit graduates in that more students lack the work experience combined with knowledge which can equip them with additional skills and help the transition into the labour market.

Local analysis shows that the recession had a significant impact on young people in the county, with youth unemployment and the proportion of 16-18 year olds not in education, employment or training (NEET) increasing more sharply locally than across England. Although unemployment and NEET levels are falling as the economy begins to recover, there are wide disparities across the county highlighting a persistent structural problem, with a core of young people who are struggling to find employment or training opportunities. Figures for 2013-14 show that the NEET level has fallen to 4.4%¹⁸ below the national level (4.7%) for the first time in a number of years. However, there is a wide variation across the county from 29.9% in part of Ilkeston Central ward in Erewash down to no 16-18 year olds being NEET in some areas of Derbyshire, with all districts having at least one area where this is the case.

Despite the pockets of high NEET levels the fall in numbers overall is encouraging and research carried out by the UK Commission for Skills¹⁹ shows a reasonably positive picture in the recruitment of young people across the county. Whilst recruitment of people into their first job from full-time education was comparable with England, employers in Derbyshire were more positive in how prepared they felt young people were for work, with 29.2% of Derbyshire employers who had

recruited 16 year olds to their first job from school saying that the young person was poorly or very poorly prepared for work, lower than the 37.8% across England.

The recently released GCSE attainment data for 2013 is also relatively positive. The achievement of five GCSEs A* to C (including English and Maths) is an important measure often used to indicate the potential of the future workforce. In 2013, 59.1% of young people in Derbyshire achieved this benchmark²⁰. This is an increase on the 57.2% in 2012 and sees the attainment gap with England narrow from 2.2% points to 0.1% points. Nevertheless, Derbyshire's performance in 2013 still places it in the lower middle quartile of performance of all local authorities in England so it is important that progress continues.

The Raising Participation Age (RPA) legislation is a now a key driver for improving labour market outcomes, with a phased implementation, which from 2015 will mean that all young people will be required to study or train until their 18th birthday. Whilst there are no legal duties on employers to give employees time off for training, the guidance encourages firms to consider how they could support young people to access learning and development. It will be important that employers locally are aware of the legislation and what it means. Inexperience and work readiness are often cited as barriers to employers recruiting young people, so lack of knowledge about the RPA is potentially a further barrier to firms recruiting young employees and employer engagement is one of the strands in Derbyshire County Council's (DCC) RPA implementation plan.

Additionally, the new DCC Council Plan identifies a range of priorities to support young people into employment which includes working with partners to expand the Derbyshire Apprenticeship Scheme, producing a Skills Strategy for Derbyshire, and developing new and innovative ways to engage employers and deliver effective careers advice to ensure young people have the skills to succeed. DCC is to produce an Employment Strategy for Young People to ensure the Council Plan priorities are realised. This will aim to ensure young people locally have the skills and knowledge to enter employment as well as persuading employers to create opportunities.

¹ Data for Derbyshire in the review does not include Derby City unless otherwise stated.

² Gross Domestic Product (GDP) Preliminary Estimate, Quarter 1 2014, ONS © Crown Copyright. Published April 2014.

³ Statistical Bulletin, Quarterly National Accounts, Quarter 4 2013, ONS © Crown Copyright. Published March 2014.

⁴ Statistical Bulletin, Consumer Price Inflation (CPI), April 2014, ONS © Crown Copyright. Published May 2014. The CPI is the main UK domestic measure of consumer price inflation for macroeconomic purposes. It forms the basis for the Government's target for inflation that the Bank of England's Monetary Policy Committee is required to achieve.

⁵ Bank of England, Monetary Policy Committee Decisions, May 2014. Published May 2014. Note, this indicator is known as 'the bank rate'.

⁶ Bank of England Agents' Summary of Business Conditions, April 2014. Published April 2014.

⁷ Derbyshire, Nottinghamshire and Leicestershire Chamber of Commerce, Quarterly Economic Survey, Q1 2014. Published April 2014.

⁸ Derbyshire Economic Partnership, 2014. Published May 2014.

⁹ The economic activity rate is the percentage of the working age population (age 16-64) who are employed or International Labour Organisation (ILO) unemployed.

¹⁰ The employment rate is the percentage of the working age population (age 16-64) who are employed including the self employed.

¹¹ The ILO defines the unemployed as people who are without work, are available to start work within the next two weeks, and have actively sought work within the previous four weeks. The ILO unemployment rate is the number of persons who are ILO unemployed expressed as a percentage of the economically active population (employed plus ILO unemployed). This is used in the Annual Population Survey and is not compatible with the claimant count unemployment noted below.

¹² Claimant count unemployment is derived from administrative data generated by the system of benefits paid to people who are out of work. It is a different definition and measure of unemployment than the ILO unemployment noted above.

¹³ Youth unemployment relates to people aged 16-24. The rates for young people at ward level are unofficial and have been calculated using population figures from the 2012 Mid-Year Population Estimates.

¹⁴ Out of Work Benefits relates to the population claiming Job Seekers Allowance, Employment Support Allowance, Incapacity Benefit, lone parents and others on income related benefits.

¹⁵ Department for Work and Pensions (DWP) Benefits, November 2013, ONS (Nomis) © Crown Copyright. Published May 2014.

¹⁶ House Price Index, Land Registry, March 2014, © Crown Copyright. Published April 2014.

¹⁷ Young People in the Labour Market, 2014, ONS © Crown Copyright. Published 2014.

¹⁸ NEET snapshot, November 2013-January 2014, DCC Children and Younger Adults (Information, Research and Analysis). Published 2014.

¹⁹ Employer Skills Survey, 2013, UK Commission for Employment and Skills. Published 2014.

²⁰ GCSE data, 2012/13, DCC Children and Younger Adults. Published 2014.



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