Cairngorms National Park
Local Development Plan 2020
Main Issues Report

Evidence Paper: Rural Development – Part 1 Housing

CONTENTS

1. POLICY CONTEXT

1.1 National Planning Framework 3

The National Planning Framework (2014) (NPF3) aims to facilitate new housing development, both in areas metropolitan areas where there is continuing pressure for growth, and through innovative approaches to rural housing provision.

The NPF3 offers a strategy for Scotland's National Parks, which states in relation to housing that positive planning and innovation should continue to deliver affordable rural housing and encourage high quality placemaking.

The NPF3 highlights the important contribution housing makes to Scotland's economy and that planning can help to address the challenges facing the housing sector by providing a positive and flexible approach to development. In particular, provision for new homes should be made in areas where economic investment is planned or there is a need for regeneration or to support population retention in rural and island areas.

1.2 Scottish Planning Policy

Scottish Planning Policy (SPP) (2014) is a statement of Scottish Government policy on how nationally important land use planning matters should be addressed across the country.

In relation to housing, SPP states that the planning system should:

- Identify a generous supply of land for each housing market area within the plan area to support the achievement of the housing land requirement across all tenures, maintaining at least a 5-year supply of effective housing land at all times;
- Enable provision of a range of attractive, well-designed, energy efficient, good quality housing, contributing to the creation of successful and sustainable places; and
- Have a sharp focus on the delivery of allocated sites embedded in action programmes, informed by strong engagement with stakeholders.

The SPP recognises the special status of National Park's as planning authorities and requires that Local Development Plans (LDPs) be consistent with National Park Plans. It states that the authority preparing the LDP for a National Park, or which affects a National Park, is required to pay special attention to the desirability of consistency with the National Park Plan, having regard to the contents (para 86). The NPPP therefore plays a leading role in setting the strategic context for the delivery of housing across the National Park and the contents of the LDP.

Development Plans

According to SPPP, Development Plans should be informed by a robust housing need and demand assessment (HNDA), prepared in line with the Scottish Government's HNDA Guidance. This assessment provides part of the evidence base to inform both local housing strategies and development plans (including the main issues report). It should produce results both at the level of the functional housing market area and at local authority level, and cover all tenures (see **Appendix 1** for details of process).

Plans should address the supply of land for all housing. They should set out the housing supply target (separated into affordable and market sector) and the housing land requirement for each functional housing market area up to year 10 from the expected year of adoption, based on evidence from the HNDA. The housing supply target is a policy view of the number of homes the authority has agreed will be delivered in each housing market area over the periods of the development plan and local housing strategy, taking into account wider economic, social and environmental factors, issues of capacity, resource and deliverability, and other important requirements such as the aims of National Parks. The target should be reasonable, should properly reflect the HNDA estimate of housing demand in the market sector, and should be supported by compelling evidence.

Within the overall housing supply target, plans should indicate the number of new homes to be built over the plan period. This figure should be increased by a margin of 10 to 20% to establish the housing land requirement, in order to ensure that a generous supply of land for housing is provided. The exact extent of the margin will depend on local circumstances, but a robust explanation for it should be provided in the plan.

The LDP should allocate a range of sites which are effective or expected to become effective in the plan period to meet the housing land requirement in full. It should provide a minimum of 5 years effective land supply at all times. Beyond year 10 and up to year 20, the Local Development Plan should provide an indication of the possible scale and location of the housing land requirement.

The housing land requirement can be met from a number of sources, most notably sites from the established supply which are effective or expected to become effective in the plan period, sites with planning permission, proposed new land allocations, and in some cases a proportion of windfall development. Any assessment of the expected contribution to the housing land requirement from windfall sites must be realistic and based on clear evidence of past completions and sound assumptions about likely future trends.

Since the National Park is not a housing authority it has no duty to produce an HNDA, with this responsibility falling to its constituent housing authorities, which in the case of the CNP are Highland, Aberdeenshire, Moray, Perth and Kinross and Angus. The National Park's Local Development Plans should draw on the evidence provided by the HNDAs of the constituent housing authorities. It should aim to meet the housing land requirement in full in their area. However, they are not required to do so, and they should liaise closely with neighbouring planning authorities to ensure that any remaining part of the housing land requirement for the National Parks is met in immediately adjoining housing market areas, and that a 5-year supply of effective land is maintained.

1.3 Planning Circular 6/2013: Development Planning

This Circular describes the development planning system in Scotland, and explains legislative provisions in both the primary legislation and the subsequent Regulations.

1.4 Planning Advice Note 2/2010: Affordable Housing and Housing Land Audits

It is not the duty of the National Park Authority to produce Housing Land Audits, therefore only section 1 of the Planning Advice Note (PAN), which provides advice and information on how the planning system can increase the supply of affordable housing, holds any requirements that need to be considered by the NPPP.

According to the PAN, a range of housing types, at different prices, tenures and locations are needed to cater for the increasing number and variety of households, maintain the viability of communities, and support the operation of local labour markets and the wider economy. In summary, it states that the Scottish Government's ambitions are:

- to increase housing supply across all tenures over the long term;
- to increase the choice of housing available to those on low incomes;
- to create housing developments of high environmental and design standards that contribute to the creation of sustainable, mixed communities; and
- to ensure that social housing provides better value for public expenditure

1.5 The Housing (Scotland) Act 2001

The Act requires local authorities to prepare a local housing strategy supported by an assessment of housing need and demand. While these obligations are not placed upon the National Park Authority, they do influence how housing is delivered within the National Park.

Housing Strategies provide information about the agreed strategic direction taken by a Local Authority on how to tackle housing issues across the privately owned, social and privately rented sectors within their area. It also informs investment in housing and related services.

Housing Need and Demand Assessments (HNDA) are technical documents that aim to give long run estimates of housing need, and provide an evidence base for both Local Housing Strategies and Local Development Plans. They are largely analytical and use quantitative information wherever it is available, supplemented by qualitative information when it is not, or to give context. In the Cairngorms National Park therefore, the HNDAs of five Local Authorities must be drawn on to inform the National Park Authority's plans and strategies.

2. TRENDS AND OTHER DRIVERS OF CHANGE

2.1 Help to Buy

The Help to Buy (Scotland) scheme helps buyers to buy a new home from a participating home builder without having to fund the entire purchase price. The scheme is now fully subscribed and no longer accepting applications for properties. All applications for completions up to 31 March 2016, received by agents by midnight 26 May 2015, have been assessed and will be supported if eligible under the rules of the scheme while all 'Authorities to Proceed' already issued remain eligible.

The Scottish Government has announced a successor to the scheme, with a greater focus on affordable housing, with eligible buyers receiving an equity loan towards the purchase price of a new built home. The Scottish Government will work with the house-building industry and lenders to agree on how the new scheme will operate, with further details to be announced following the UK Government's spending review in November. It is currently intended that the Scottish Government will spend £195 million over the next three years on this new shaded equity scheme to help around 6,500 households buy a home.

2.2 Right to Buy

The 'Right to Buy' was introduced in October 1980 and gave tenants of council housing the right to buy their homes at a discount, depending on how long they had been living in the property.

The Housing (Scotland) Act 2001 introduced the Scottish secure tenancy from 30 September 2002. This provided a single, common tenancy for nearly all tenants of local authorities and housing associations in Scotland and made important changes to the right to buy. The qualifying period increased from two to five years and the maximum discount was reduced to 35% or £15,000, whichever was lower. This is called the 'modernised right to buy'. Housing association tenants who previously did not have the right to buy now had a modernised right to buy but this was suspended for 10 years until 2012. The Act also gave housing associations the right to apply to extend this suspension beyond 2012.

On 1 March 2011, the Housing (Scotland) Act 2010 came into force and introduced further changes to the right to buy rules. The main changes were that the right to buy was removed from:

- new-build and new-supply social housing;
- people who take up a tenancy with a social landlord for the first time; and
- with some exceptions - tenants who return to the social rented sector after a break.

Right to Buy will end for all council and housing association tenants in Scotland on 1 August 2016. Tenants with a right to buy that they are allowed to use will have until 31 July 2016 to do so.

2.3 Community Empowerment (Scotland) Act 2015

The stated aims of the Act are to:

- empower community bodies through the ownership of land and buildings and strengthening their voices in the decisions that matter to them; and
- support an increase in the pace and scale of public service reform by cementing the focus on achieving outcomes and improving the process of community planning.

Some of the key provisions of the Act have an implication for the delivery of housing:

- **Strengthening Community Planning:** greater focus on tackling inequality, improved resourcing of community engagement; and a requirement to improve public sector collaboration, involving a broader range of agencies (including National Park Authorities);
- **Participation Requests:** a provision which allows community groups to participate in a process designed to improve the delivery of a strategic outcome. There is a presumption in favour of the request being granted and this provision applies to a significant number of public agencies (including National Park Authorities);
- **Asset Transfer Requests:** a provision allowing appropriately constituted community groups to request the transfer of a public asset to their use, management or ownership. This provision applies to a significant number of public agencies (including National Park Authorities); and
- **Right-to-Buy:** the community right to buy is extended to all communities and a new provision allows communities to purchase land where they can persuade Scottish Ministers that it is abandoned or neglected, or has a negative impact on their environmental quality of life.

2.4 Land Reform (Scotland) Act 2016

The additional provisions for the community right-to-buy set out within the Community Empowerment (Scotland) Act 2015 are further supported by the Land Reform (Scotland) Act 2016, which was passed by the Parliament on 16 March 2016 and received Royal Assent on 22 March 2016. The Act seeks to increase the contribution of Scotland's land to sustainable economic growth; empower greater numbers of people; and change patterns of ownership in Scotland to ensure greater sustainable development. The aims of the Act are to:-

- ensure the development of an effective system of land governance and on-going commitment to land reform in Scotland;
- address barriers to furthering sustainable development in relation to land and improve the transparency and accountability of land ownership; and
- demonstrate commitment to effectively manage land and rights in land for the common good, through modernising and improving specific aspects of land ownership and rights over land.

Within the Act there is one main provision that may directly impact on housing. This proposed provision will allow communities to purchase land where they can persuade

Scottish Ministers that a transfer will provide significant benefit to the community; prevent significant harm; further sustainable development; and is the only practicable way of achieving the stated benefit.

3. CURRENT POLICY APPROACH

Policy 1: New Housing Development aims to create opportunities for the right type of housing, in the right place, that makes a positive contribution to local communities. It aims that developers will have confidence to invest and in turn communities will have the support they need to become and remain thriving places where people enjoy a sense of wellbeing.

The Policy consists of ten sub-policies that cover different aspects of housing delivery:

- Policy 1.1 Housing in settlements
- Policy 1.2 Housing development in existing rural groups
- Policy 1.3 Other housing in the countryside
- Policy 1.4 Contribution towards affordable housing provision
- Policy 1.5 Affordable housing developments
- Policy 1.6 Affordable housing provided using cross subsidy from other housing
- Policy 1.7 Alterations to existing houses
- Policy 1.8 Conversions
- Policy 1.9 Replacement houses
- Policy 1.10 Housing for gypsies and travellers and travelling showpeople

Policy 1 was used a total of 127 times, twice (1.6%) by the CNPA and 125 (98.4%) times by the Las in the first year of the current LDP's adoption. It resulted in a total of 122 (96.1%) applications being approved and 5 (3.9%) refused (Figure 5 and Figure 6).

Figure 1 Use of Policy 1 by Planning Authority type.

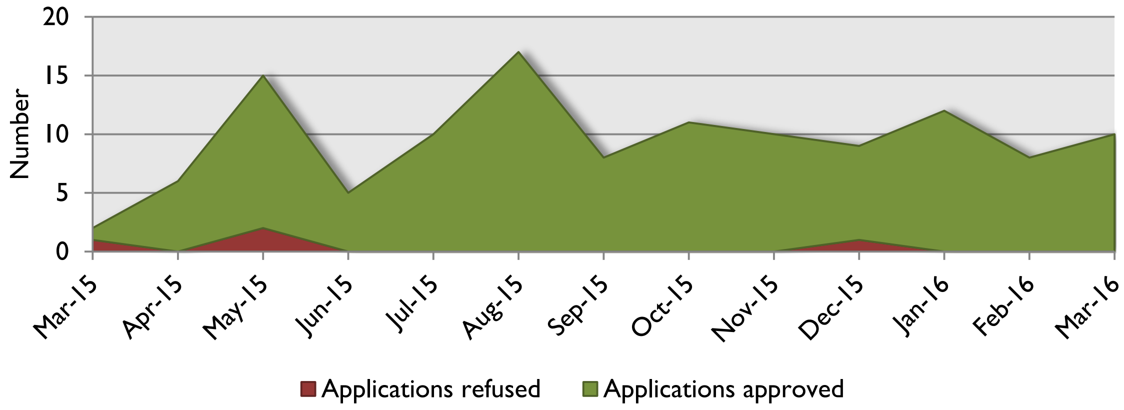

Figure 2 Use of Policy 1 by month.

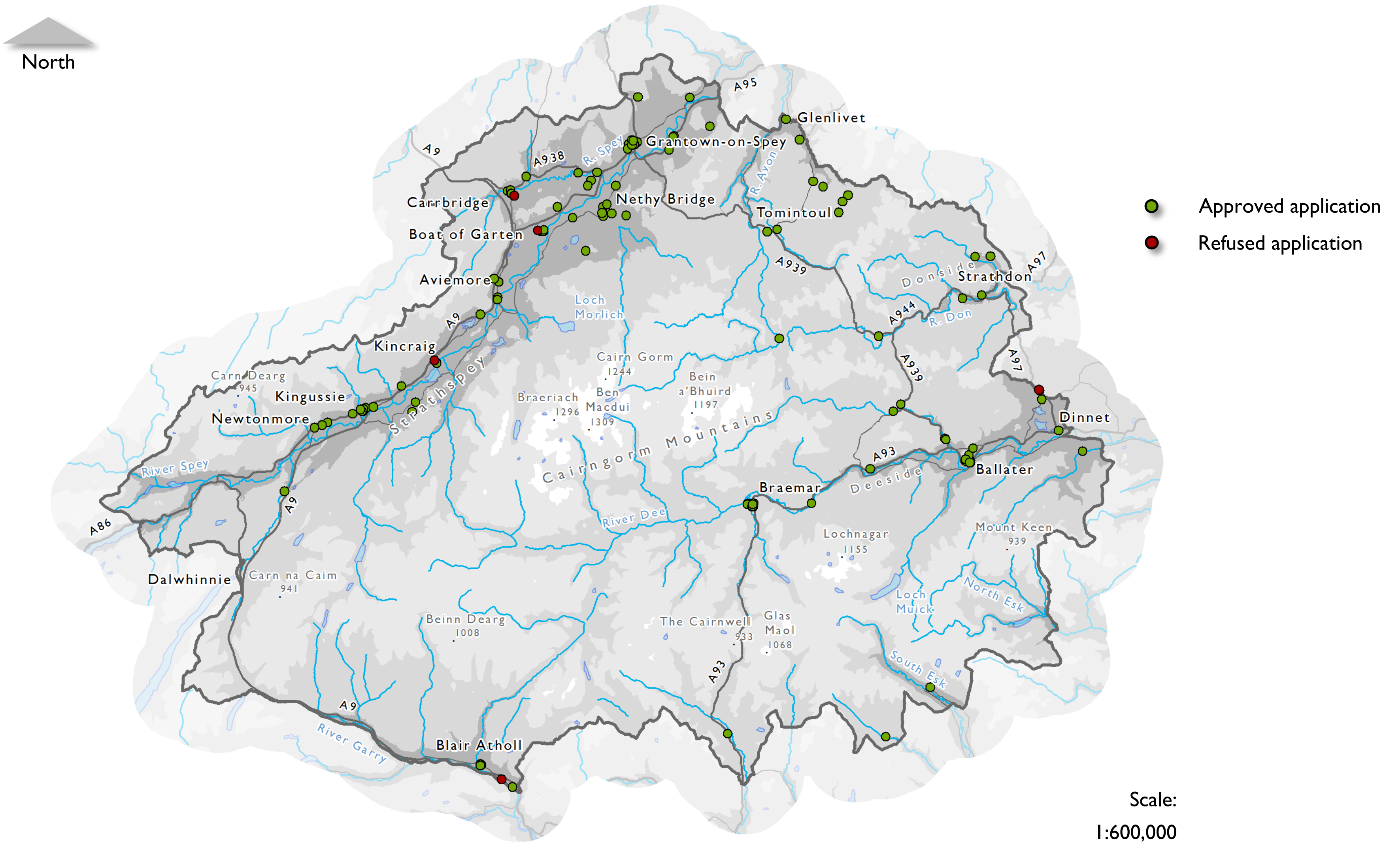

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Figure 3 Location of planning applications where 'Policy 1 New Housing Development' was used. Reproduced by permission of Ordnance Survey on behalf of HMSO.

4. CHALLENGES AND ISSUES WITHIN THE CAIRNGORMS NATIONAL PARK

4.1 Identifying Housing Need

There is no single official measure of housing need, however the process within Scotland's National Parks is complicated by the fact that a great deal of relevant information is not available at a National Park scale. The responsibility for studies such as Housing Need and Demand Assessments (HNDA) therefore falls outside the remit and ability of National Park Authorities, lying in the hands of the Local Authorities that cover their areas. Studies such as HNDAs are not always directly useful to National Park Authorities, since the Housing Market Areas they identify are not necessarily contiguous with National Park boundaries. However, certain important types of data, such as population and household projections and data on market affordability, may be collected allowing key issues to be identified.

4.2 Population and Household Projections

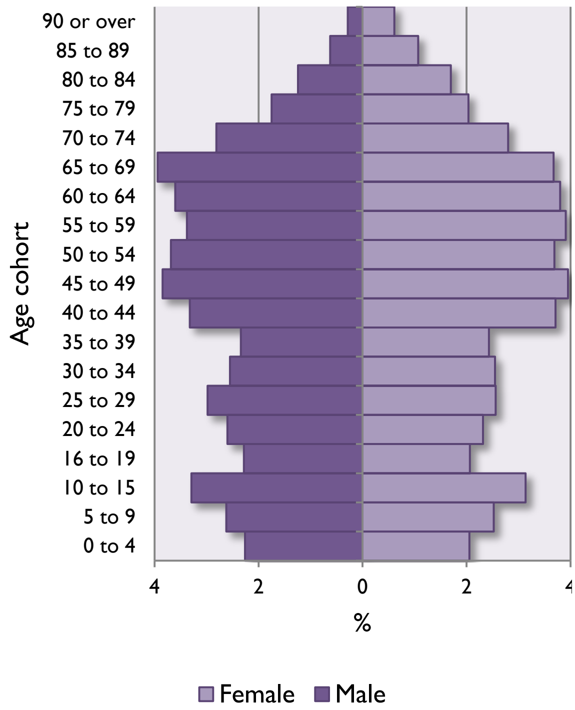
Population

Population and household projections are frequently used to inform housing policy and may be used to inform the housing land requirements for Local Development Plans (LDPs) and other strategic documents. Population and household statistics within the Cairngorms National Park are calculated using an aggregate of data zones that roughly correspond with its boundary. For full details on how these data zones are collected, see **Appendix 2**.

In 2014[1] the estimated population of the National Park was 18,594, with 9,186 males and 9,408 females.

The National Park has a distinctly different population profile to the national (**Figure 4**), with a higher proportion of people falling within the 55 to 74 age cohorts. When compared to other rural parts of Scotland, the Cairngorms National Park also has a relatively high proportion of residents within the 10 to 29 age cohorts (see NRS 2014). This is thought to be due to the relatively high number of opportunities for employment in the outdoor and tourism sectors. There is also a spike in the 10 to 15 year cohort, which is replicated across Scotland as a whole.

[1] 2014 Mid-year estimates represent the most recent set of population statistics at a data zone level at time of writing.



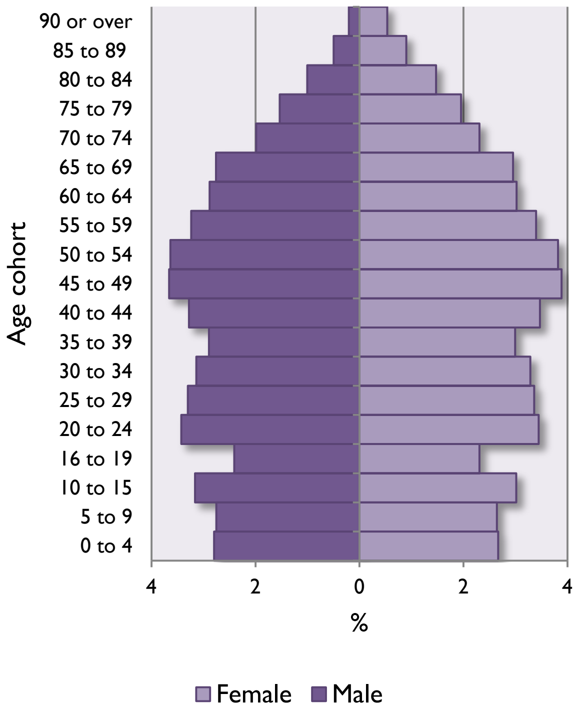


Figure 4 Estimated population profile by age and sex in the Cairngorms National Park in 2014.

Figure 5 Estimated population profile by age and sex in Scotland in 2014.

Source: www.sns.gov.uk

Although mid-year estimates suggest a slowdown in the rate of growth between 2011 and 2014, during the 21st century[2], the National Park has experienced a significant net increase in its resident population, rising by approximately 2,261 persons (a growth of 13.8%) (**Figure 6**). This growth is well above the overall Scottish rate, which saw a net increase of around 5.6% over the same period.

[2] Figures between 2001 and 2009 include people living in the area of Perth and Kinross which did not become part of the National Park until 2010.

This growth has not been evenly distributed throughout the National Park (**Figure 7** and **Figure 8**). Indeed, the overall population in data zones within Aberdeenshire and Perth and Kinross has remained relatively stable.

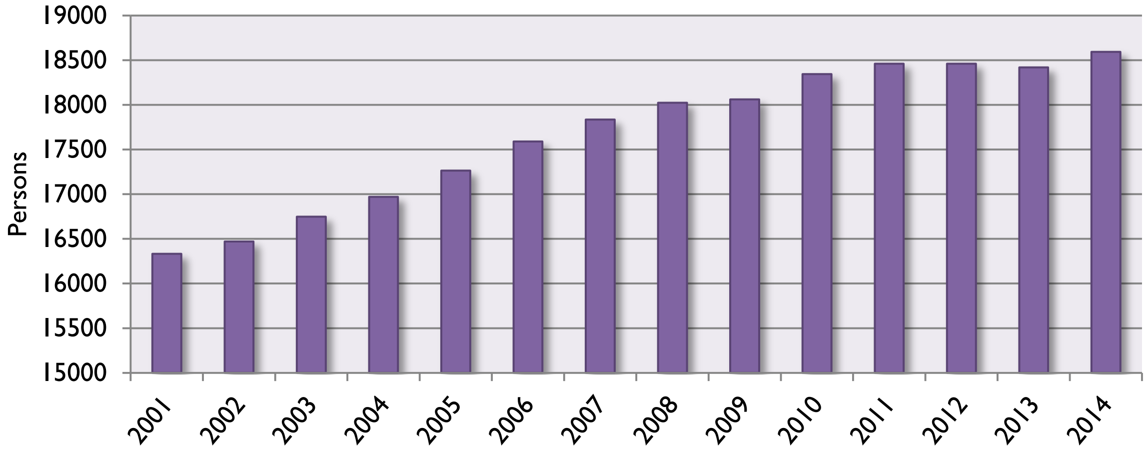


Figure 6 Mid-year estimates of total population for the Cairngorms National Park. Source: www.sns.gov.uk

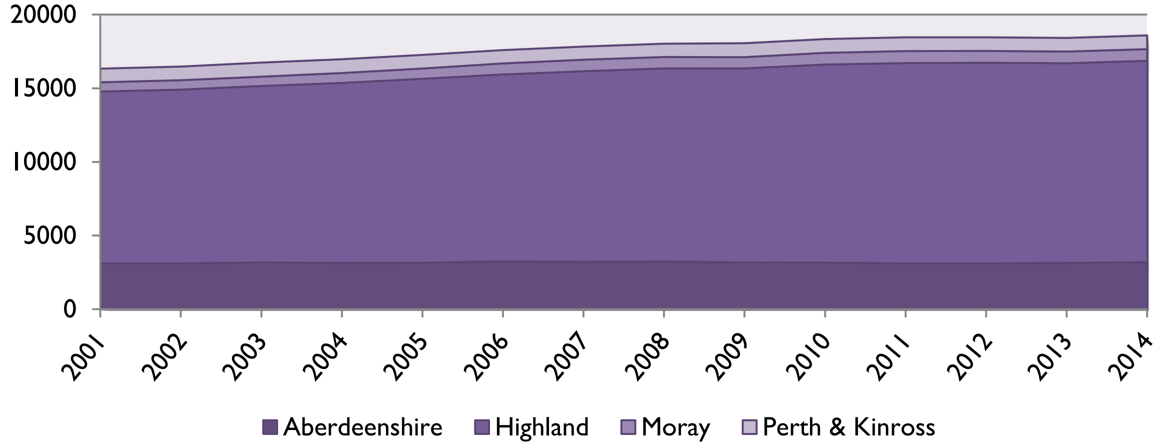


Figure 7 Mid-year estimates of total population for the Cairngorms National Park distributed by Local Authority Area. Source: www.sns.gov.uk

The greatest increase occurred within Aviemore, which is estimated to have grown by around 1,009 people. Proportionally this represents a growth of around 142%. Most of Badenoch and Strathspey also experienced growth, gaining an estimated 1,014 people. Taken together, this addition of 2,023 persons resulted in the Highland area of the National Park growing by 17.4%.

Although net population change within the National Park has been positive, certain areas experienced a reduction in the population. For example, the population of data zone S01000312, which represents part of Ballter, lost around 93 persons (-14.5%). It is unclear if this represents a genuine trend or is a result of methodical or sampling changes to the mid-year estimate methodology.

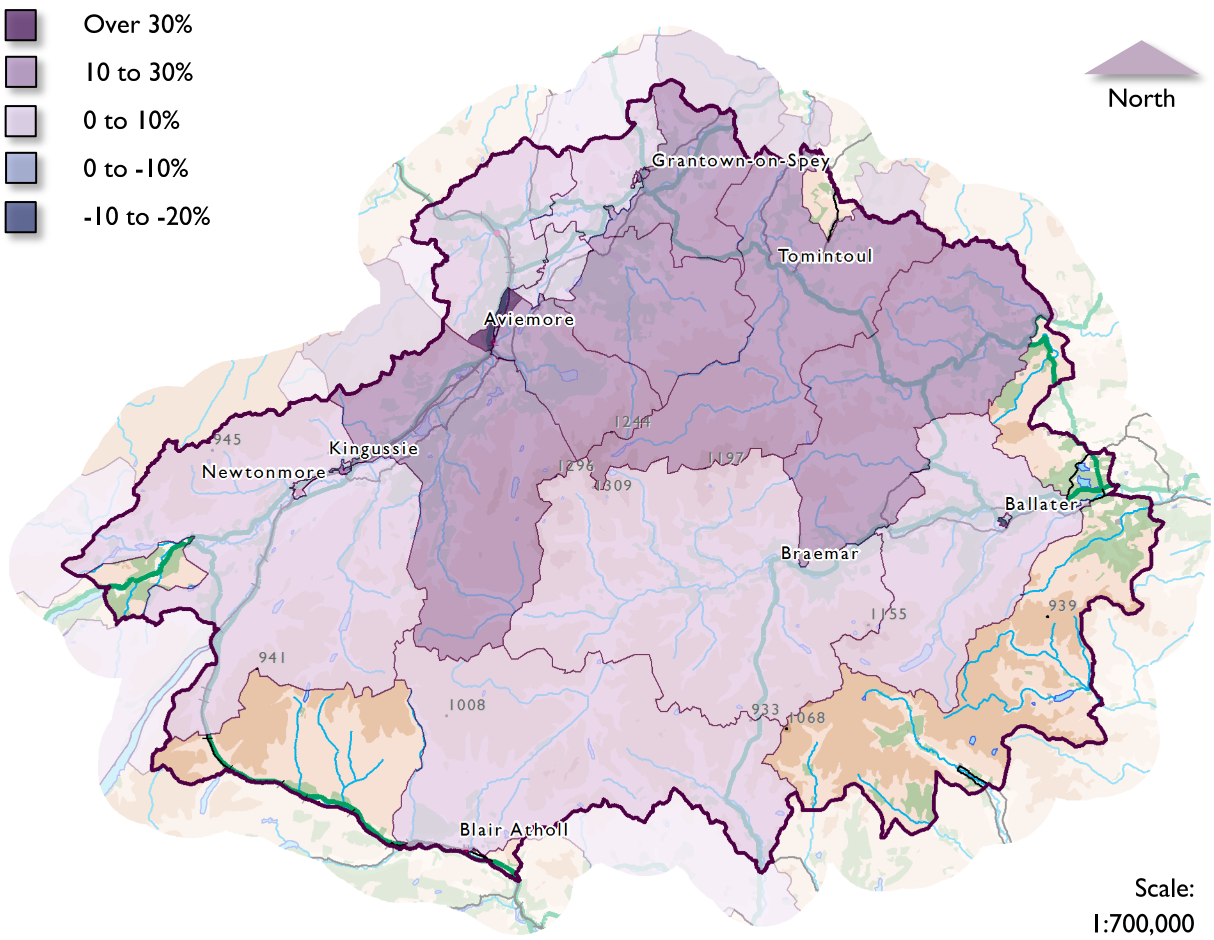


Figure 8 Population change within the Cairngorms National Park between 2001 and 2014 (based on mid-year estimates). Reproduced by permission of Ordnance Survey on behalf of HMSO. Ordnance Survey Licence number 100040965 Cairngorms National Park Authority.

Population projections for the National Park are produced by National Records of Scotland (NRS), with the most recent being 2014 based projections, published in October 2016 (**Figure 9**). NRS's (2016) principal projection is that between 2014 and 2039, the population of Cairngorms National Park will drop from 19,010 to 18,337 (a decrease of around 4%)[3].

This projection is in contrast to the level of growth experienced previously and indeed NRS' 2012 based principle projection, which projected a growth in the population of around 1%. Table 1 shows the principle projected percentage population change for the National Park and compares the projected rates of natural change and migration across areas between 2014 and 2039.

The population of the National Park is projected to decrease despite positive projected net migration to the area over the projection period. This is because the number of deaths is projected to exceed the number of births. This is largely due to the age structure of the population in these areas.

[3] The reason that NRS' population estimate for 2014 differs from the 2014 mid-year estimate quoted on page 8 is due differences in the way small population areas are aggregated; see Appendix 2 for further details.

Table 1 Components of projected population change for the Cairngorms National Park, Principle projection 2014 to 2039[4].

Natural Change (per thousand people)	Net migration (per thousand people)	Population change (percentage)
-71.8	52.8	-3.5

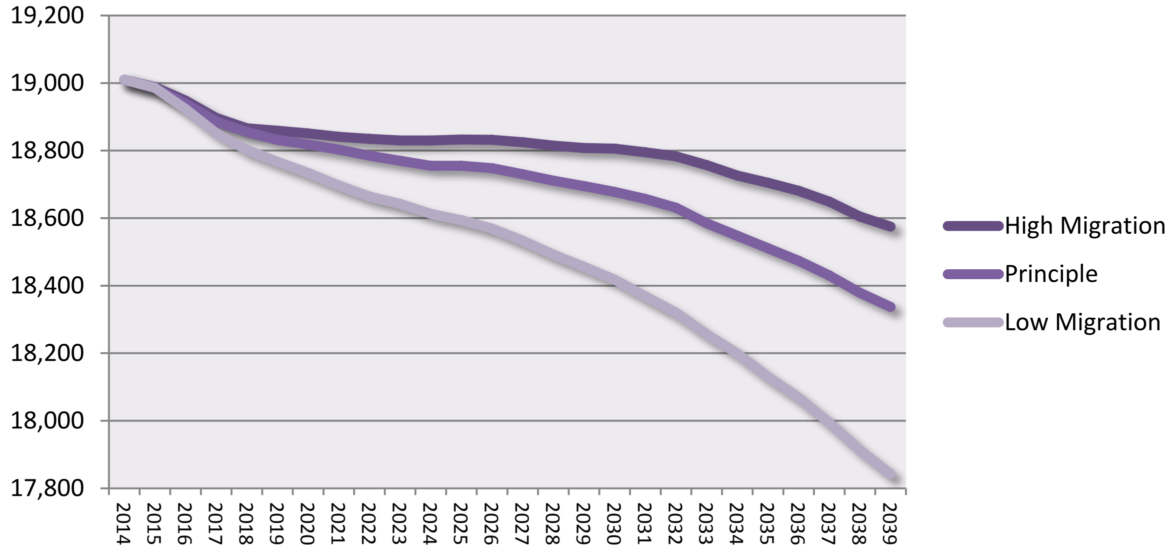


Figure 9 Projected total population of the Cairngorms National Parks, High, Principal, Low and Zero migration scenarios 2014-2039 (NRS, 2016).

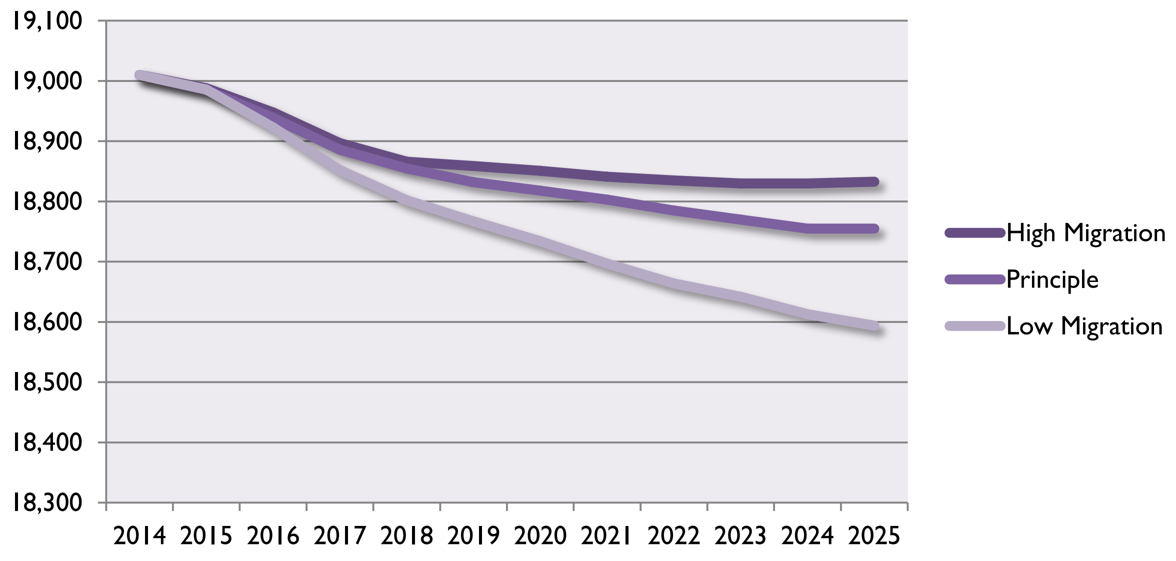


Figure 10 Projected total population of the Cairngorms National Parks, High, Principal and Low migration scenarios for the current and next plan period, 2014-2025

[4] Projected natural change and net migration are not the only components of change. Other changes that are not included in this table include changes in armed forces and prisoner populations and changes due to constraining to the National Population Projections for Scotland.

NRS (2016) also give an indication of how the age structure of the population might change (**Figure 11** and **Figure 12**). According to the principal migration scenario, the number of children aged under 16 is projected to decrease by 21% over the projection period from 3,030 in 2014 to 2,383 in 2039. The number of people of working age is projected to decrease from 11,250 in 2014 to 10,178 in 2039, a decrease of 10%. The population of pensionable age is projected to rise by 23% from 4,730 in 2014 to 5,776 in 2039. However, the number of people aged 75 and over is projected to from 1,782 in 2014 to 3,505 in 2039, an increase of 97%. By 2039 the population is projected to be more heavily distributed at older ages.[5]

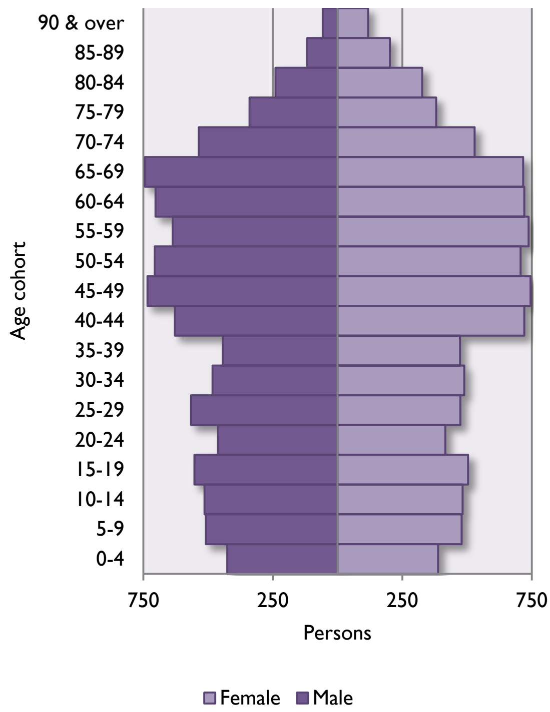


Figure 11 Estimated population profile by age and sex in the Cairngorms National Park in 2014 (NRS, 2016).

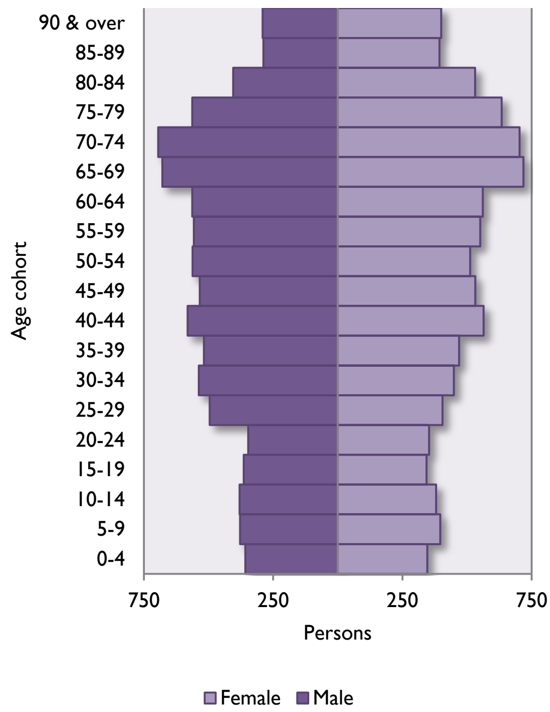


Figure 12 Projected population profile by age and sex in the Cairngorms National Park in 2039, Principle migration scenario (NRS, 2016).

Household Projections

It's clear that this projected change in population and demographic character will result in an increase in the number of households within the National Park. NRS's (2017) principal projections suggest that households are set to increase from 8,653 in 2014 to 9,195 in 2039, an increase of 542 (6%) (**Figure 12, Figure 13** and **Table 2**). Given the limited nature of the projected population growth, it is clear that it does not entirely explain the projected change in the number of households. Indeed, the difference between the household and

[5] Estimates based on State Pension Age. As set out in the 2014 Pensions Act, between 2014 and 2018, the state pension age will rise from 62 to 65 for women. Then between 2019 and 2020, it will rise from 65 years to 66 years for both men and women. A further rise in state pension age to 67 will take place between 2026 and 2028. Between 2044 and 2046, state pension age will increase from 67 to 68. The UK Government plan to review state pension age every five years in line with life expectancy and other factors.

population projections is due to falling average household sizes, which are projected to drop from 2.15 people in 2012 to 1.93 people in 2037 (**Figure 13**).

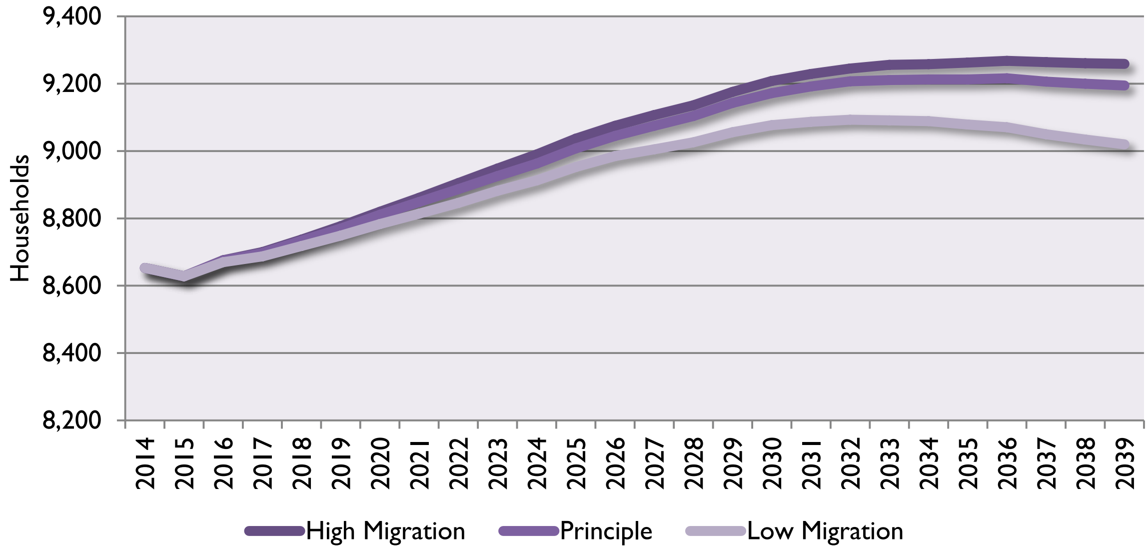


Figure 13 Overall household projections for the Cairngorms National Parks, High, Principal and Low migration scenarios 2014 to 2039 (NRS, 2017).

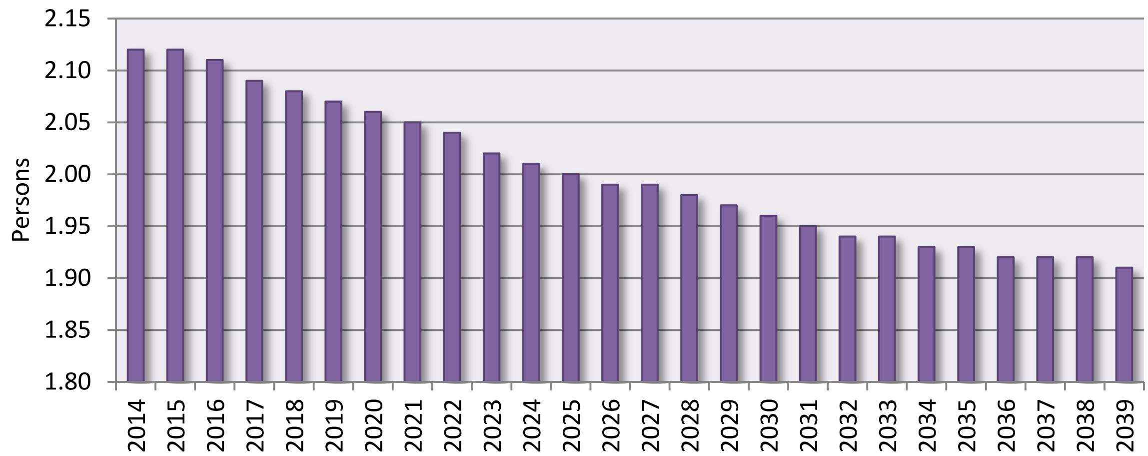


Figure 14 Projected household size for the Cairngorms National Park, principal migration scenario 2014 to 2039 (NRS, 2017)

The decreasing average household size is reflected in the changes in the number of households in each household type (**Table 2**). There is a projected increase of 26% in the number of adults living alone while the number of households containing one adult with children is also set to increase by 29%. There is also a projected decrease in the number of households containing two or more adults with children (-7%), or three or more adults (-23%).

An important driver of decreasing household size is the ageing population, as children tend to live in larger households and older people in smaller ones. The National Park has a projected increase of 23% in the number of people in older age groups (65+), while children (aged zero to fifteen) and the 16 to 64 population are projected to decrease by 21% and 10%, respectively. The gap between the average life expectancy of men and women in Scotland is also narrowing. This means that the number of older men living alone is projected to increase more rapidly than the number of older women. In the Cairngorms National Park, the number of men aged 65 or over living alone is projected to increase by 80%, while the number of women in the same age group is projected to increase by 37%, although there will still be more older women than men living alone in 2039.

Table 2 Household projections for the Cairngorms National, by type of household, principal migration scenario 2012 to 2037 **(NRS, 2017).**

Household Type	2014	2019	2024	2029	2032	2039	Average annual change 2014-2039	Overall Change 2014-2039	
1 adult	2,889	3,016	3,178	3,337	3,434	3,494	24	605	21%
2 adults	3,177	3,260	3,350	3,424	3,405	3,335	6	158	5%
1 adult with children	453	465	493	520	547	571	5	118	26%
2+ adults with children	1,560	1,484	1,436	1,395	1,398	1,398	-6	-161	-10%
3+ person all adult	575	545	505	466	429	397	-7	-178	-31%
All households	8,653	8,770	8,963	9,143	9,213	9,195	22	542	6%

Household projections are important as they offer a useful starting point in informing the National Park's future housing land requirement. These need to be interpreted and considered alongside other factors and trends, including housing need and demand as well as supply. Jointly, these combine to inform the new housing land requirement that the CNPA will need to identify and the type of housing that requires to be provided.

4.3 Housing Market Characteristics

House Prices and Affordability

Between 1993 and 2015[6], the median price of a property in the Cairngorms National Park saw a net rise of almost 230%, with a peak in 2015 of £192,500 (**Table 3** and **Figure 15**). The 'credit crunch' does not appear to have had much of an immediate impact on prices, although it seems to have resulted in a lower level of sales between 2007 and 2014. The growth in house prices has also been lower and more variable since 2007 and while 2015 represents an all-time high, it is difficult in the current economic climate to tell whether this marks the beginning of a longer term trend.

Between 2007 and 2015, the median house price to median household income/earnings ratio in the National Park fell from over 8 times income to around 6. However, despite this

[6] These are the most recent house price estimates available at a data zone level at the time of writing.

improvement, the lower availability of mortgage finance for first time buyers means that many aspiring households still cannot afford to buy.

Table 3 Median House Prices in the Cairngorms National Park (Source: http://www.sns.gov.uk/).

Year	Median Sale Price	Annual Change in Sale Price	Number of Sales	Annual Change in Number of Sales	Estimated Median Gross Household Income[7]	Annual Change in Estimated Median Gross Household Income	Estimated Median House Sale Price / Income Ratio
1993	£56,000	N/A	237	N/A	No Data	No Data	No Data
1994	£58,500	4.5%	222	-6.3%			
1995	£60,000	2.6%	234	5.4%			
1996	£59,000	-1.7%	233	-0.4%			
1997	£65,500	11%	274	17.6%			
1998	£57,000	-13%	276	0.7%			
1999	£68,876	20.8%	301	9.1%			
2000	£75,000	8.9%	258	-14.3%			
2001	£75,000	0%	344	33.3%			
2002	£87,000	16%	338	-1.7%	£20,701	N/A	4
2003	£93,250	7.2%	334	-1.2%	£21,194	3.8%	4
2004	£125,000	34%	306	-8.4%	£21,961	3.6%	6
2005	£146,000	16.8%	328	7.2%	£23,298	4.2%	6
2006	£175,000	19.9%	392	19.5%	£24,468	4.8%	7
2007	£180,500	3.1%	414	5.6%	£24,622	2.2%	8
2008	£181,000	0.3%	287	-30.7%	£26,156	4.3%	7
2009	£175,000	-3.3%	229	-20.2%	£27,386	6.4%	6
2010	£190,000	8.6%	289	26.2%	£27,765	0.7%	7
2011	£191,000	0.5%	251	-13.1%	£28,167	0.5%	7
2012	£176,500	-7.6%	230	-8.4%	£28,652	2.8%	7
2013	£165,000	-6.5%	294	27.8%	£29,207	1.0%	6
2014	£182,500	10.5%	402	36.7%	£29,577	2.8%	6
2015	£192,500	5.5%	377	-6.2%	£30,178	0.4%	6

[7] Based on small area estimates by Bramley & Watkins (2013) and Local Authority estimates from ONS' annual survey of hours and earnings - resident analysis.

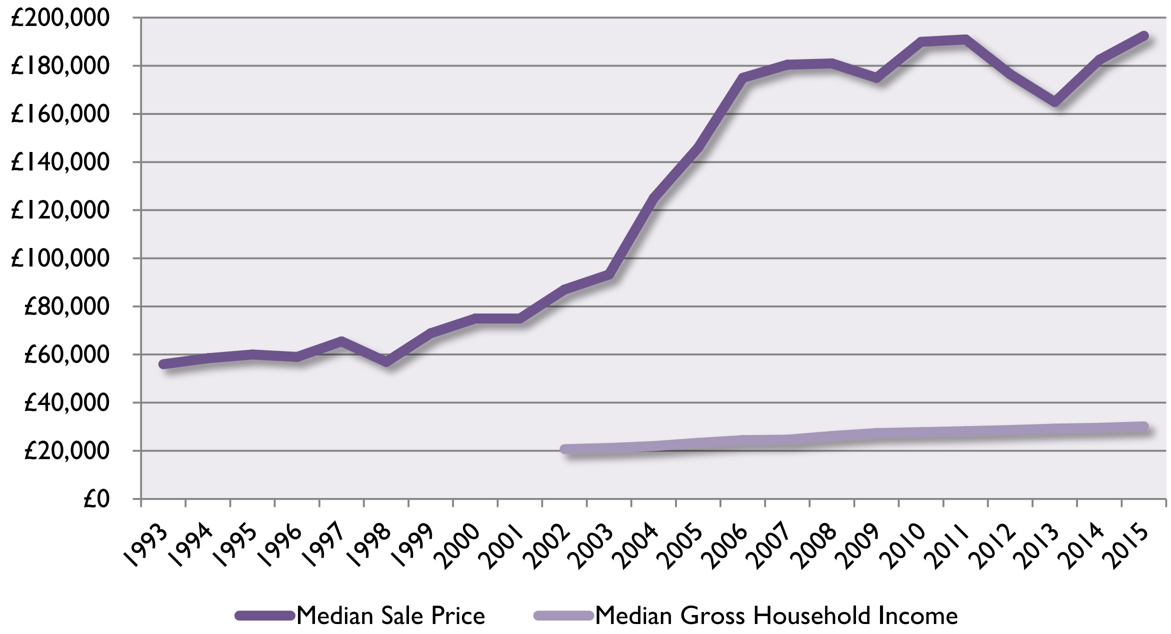


Figure 15 Median house prices and median gross household income within the Cairngorms National Park 1993-2015 Sources: www.sns.gov.uk/; Bramley and Watkins, 2013 & www.nomisweb.co.uk).

There is also considerable variation in the median house prices across the National Park, ranging from £100,000 in parts of Badenoch and Strathspey, to £355,500 in part of Deeside (**Figure 16**). There were no areas where the median house price / median household income/earnings ratio was below 4, while the area around Ballater (data zone S0100303) had the greatest difference, with median house prices being in the region of 10 times median incomes (**Figures 22 - 24**). However, it should be noted that the volume of sales for most data zones is relatively low from year to year and therefore annual median house prices and income rations can vary, sometimes greatly, from year to year. Certain areas do however have consistently high median prices, namely Aviemore and its surrounding area, Deeside and the Perth and Kinross area of the National Park.

Another aspect of this spatial variability is that since 1993 the range of median house prices has grown significantly. In 1993 the difference between the lowest and highest median price was £73,005, while in 2015 it was £255,000, a change of nearly 250%. This suggests that while median house prices have risen in all parts of the National Park, they have grown significantly faster in certain data zones than it has in others. This change can be observed spatially in Figure 17 to Figure 21, which shows the change in median prices by data zone at 5 year intervals beginning in 1995. In 1995 only three data zones had a median price in excess of £100,000. In 2015 the lowest median house price was £100,000 and represented just one data zone.

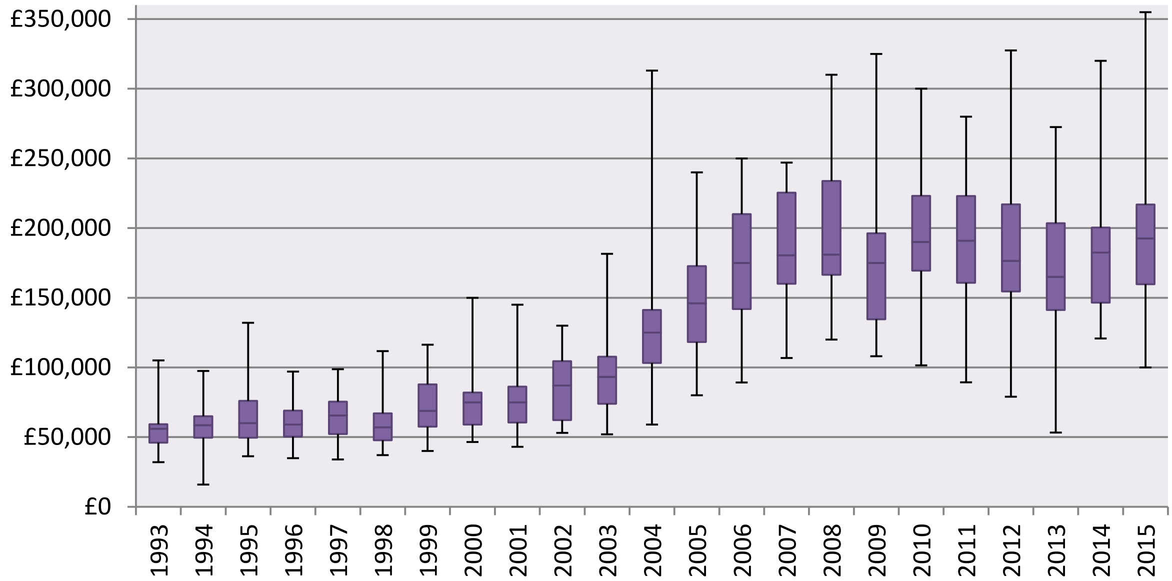


Figure 16 Box plots of Median House Prices of data zones within the Cairngorms National Park (Source: http://www.sns.gov.uk/).

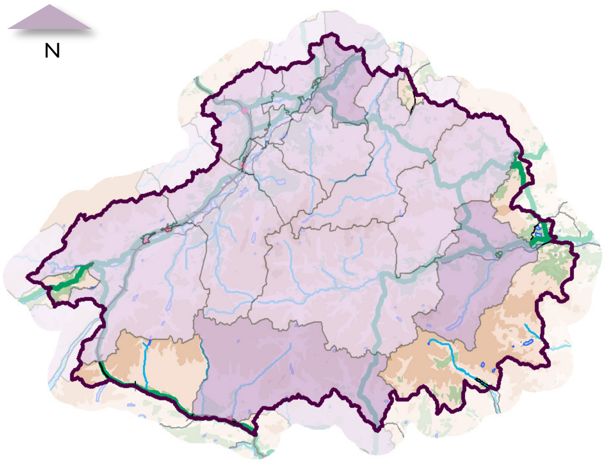


Figure 17 Median House Prices of data zones within the Cairngorms National Park in 1995.

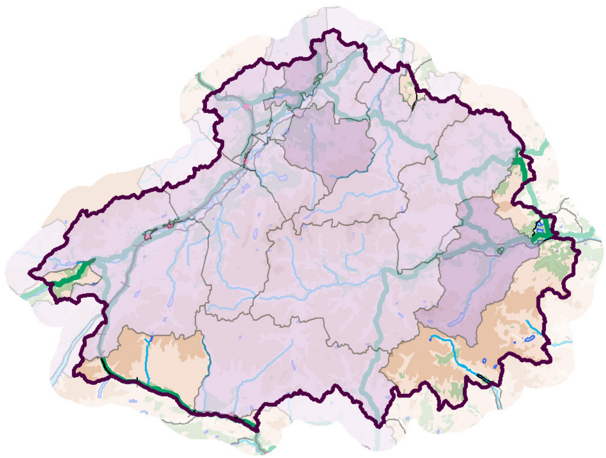


Figure 18 Median House Prices of data zones within the Cairngorms National Park in 2000.

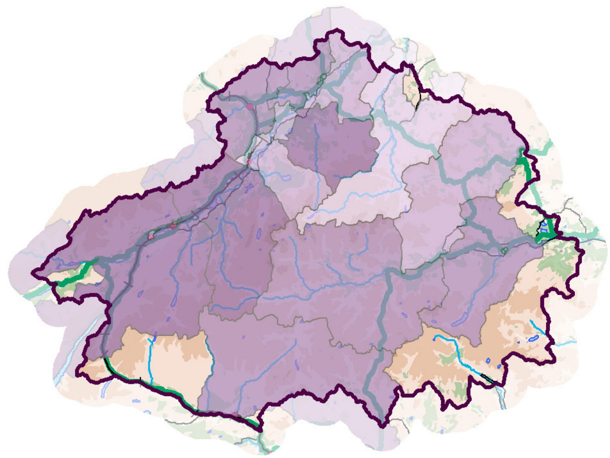


Figure 19 Median House Prices of data zones within the Cairngorms National Park in 2005.

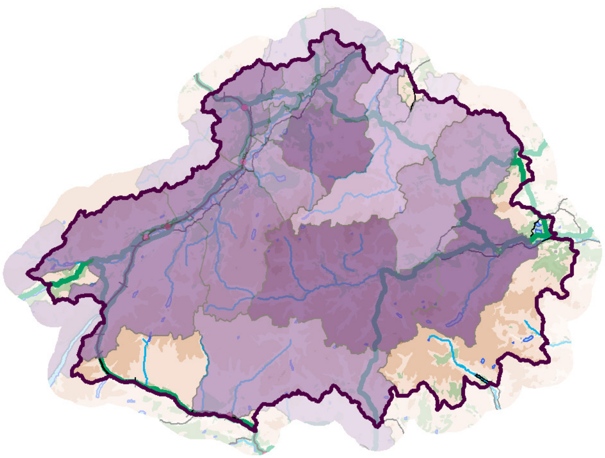


Figure 20 Median House Prices of data zones within the Cairngorms National Park in 2010.

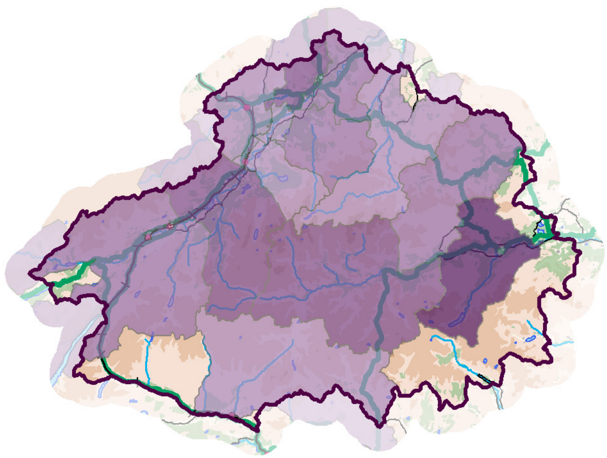


Figure 21 Median House Prices of data zones within the Cairngorms National Park in 2015.

- 0 – £100,000
- £100,000 – £150,000
- £150,000 – £200,000
- £200,000 - £250,000
- £250,000 – £300,000
- £300,000 – £350,000
- £350,000 – £400,000

All maps are at a scale of 1:1,400,000

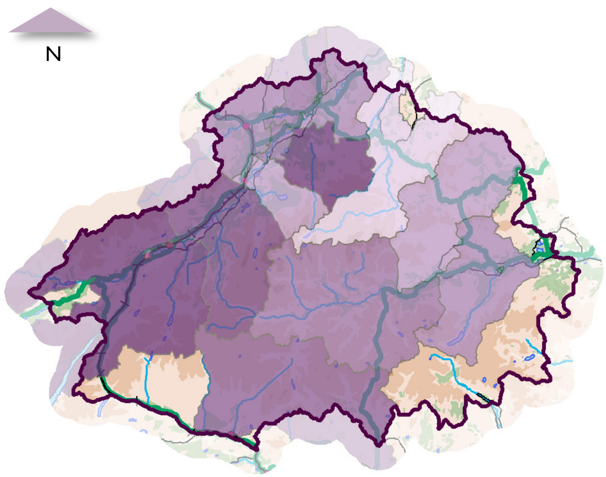


Figure 22 Median House Price / Income ratio of data zones within the Cairngorms National Park in 2005.

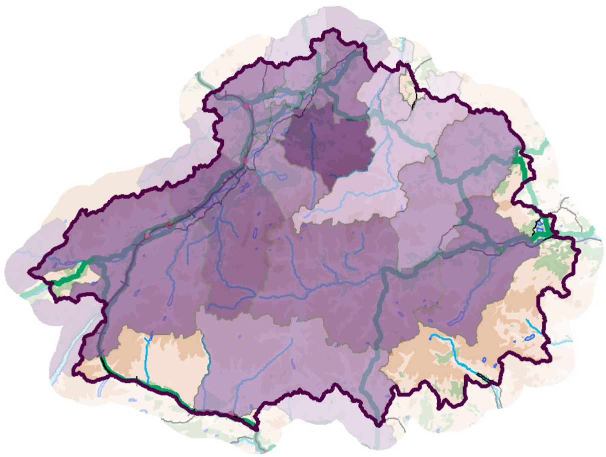
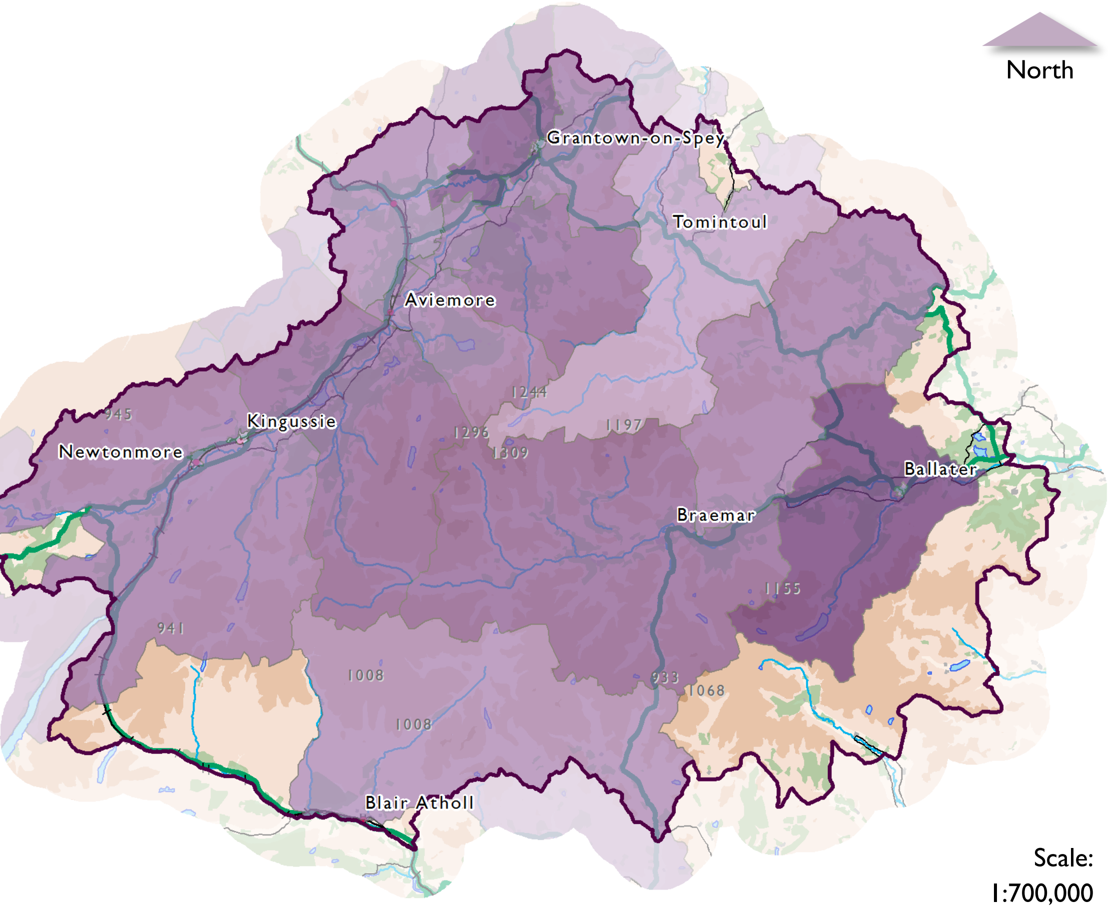


Figure 24 Median House Price / Income ratio of data zones within the Cairngorms National Park in 2010.



Scale:
1:700,000

Figure 23 Median House Price / Income ratio of data zones within the Cairngorms National Park in 2015.

Figure 22 and Figure 24 are at a scale of 1:1,400,000

Current Asking Prices

The CNPA has carried out several surveys of the current asking price for property within the National Park based on a search of Estate Agent and property marketing websites. The first of these was carried out between 17th and 18th September 2015, where it was found that there were 166 properties for sale and the second on the 19th December 2016 where 108 were identified (**Figure 25)**. In both surveys, the vast majority were within Badenoch and Strathspey.

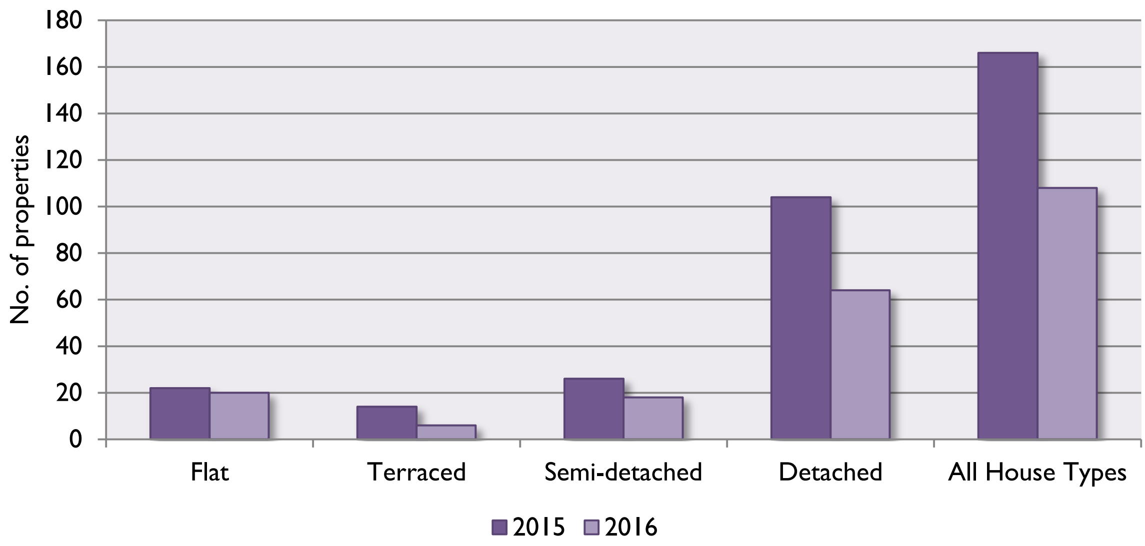


Figure 25 Property types on sale within the Cairngorms National Park, September 2015 and December 2016.

According to these samples, the median asking price within the National Park in both 2015 and 2016 was £225,000 (**Figure 26**), which is around 8 times greater than median income/earnings. Complexities exist in equating this to a median sale price as this will be dependent on negotiation at the point of sale. Within the National Park, properties priced below the median are often sold at a price above their asking price and valuation while properties above often go at or below their valuation.

The high median asking price quoted in this study is likely to be in part due to the current dominance of large and / or detached units within the sample as the median asking price for detached properties is around twice that of terraced and semi-detached properties and around three times that of flats.

The relatively low numbers of small units in the sample may be due to a number of reasons. Firstly, it is likely that such units are sold quicker than larger units and therefore the number of properties counted in a sample such as this is always likely to be low. Secondly, based on information derived from Council Tax payments, it is evident that the National Park contains a lower proportion of smaller houses than the Scottish average (see **Table 11** and **Table 7**).

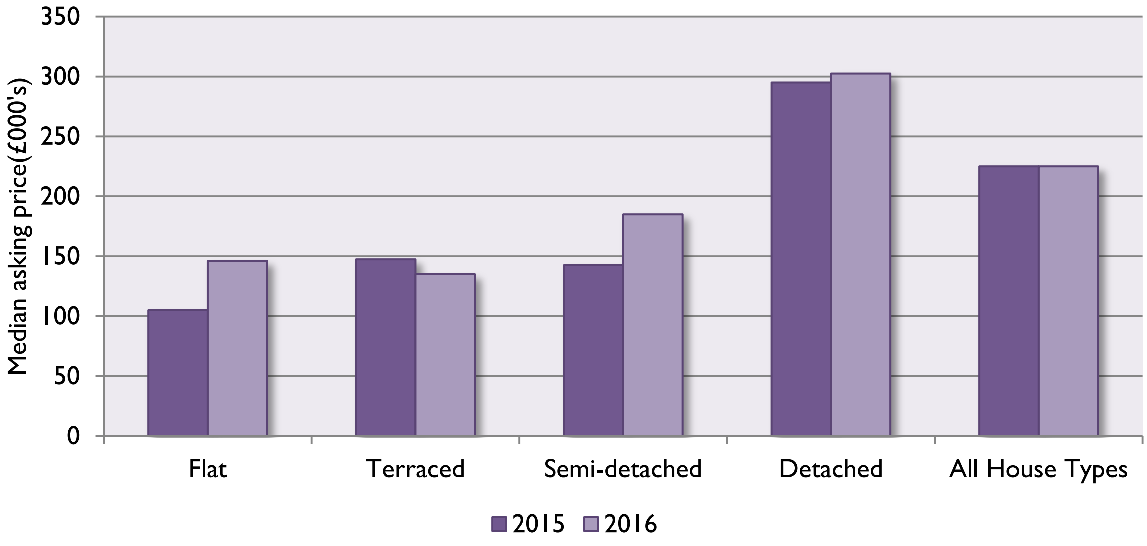


Figure 26 Median asking price by property type the Cairngorms National Park, September 2015 and December 2016.

While the overall median asking price has remained the same, large rises are seen in the asking price of flats (39.3%) and semi-detached (29.8%) properties. This is of concern as these properties are usually those, by virtue of their relatively low cost, favoured by those on median and below median incomes. The cause of this increase is difficult to ascertain, however it could simply be a reflection of the small sample size. Indeed the low sample size is reflected in the significant variability of the median time on market for such properties (**Figure 27**).

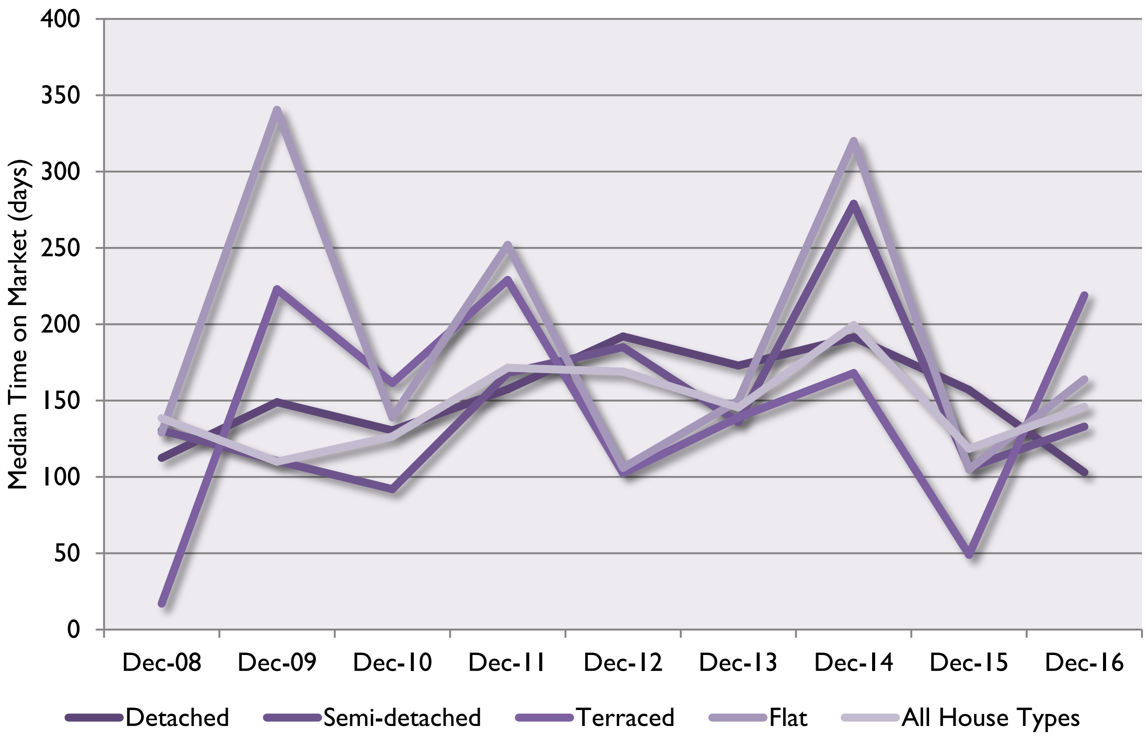


Figure 27 Median time of properties on market in postcode areas covering the Cairngorms National Park 2008-2016 (www.home.co.uk).

The way in which property is marketed can also give a strong indication of the nature of the current market and so the CNPA's study also collated this information (

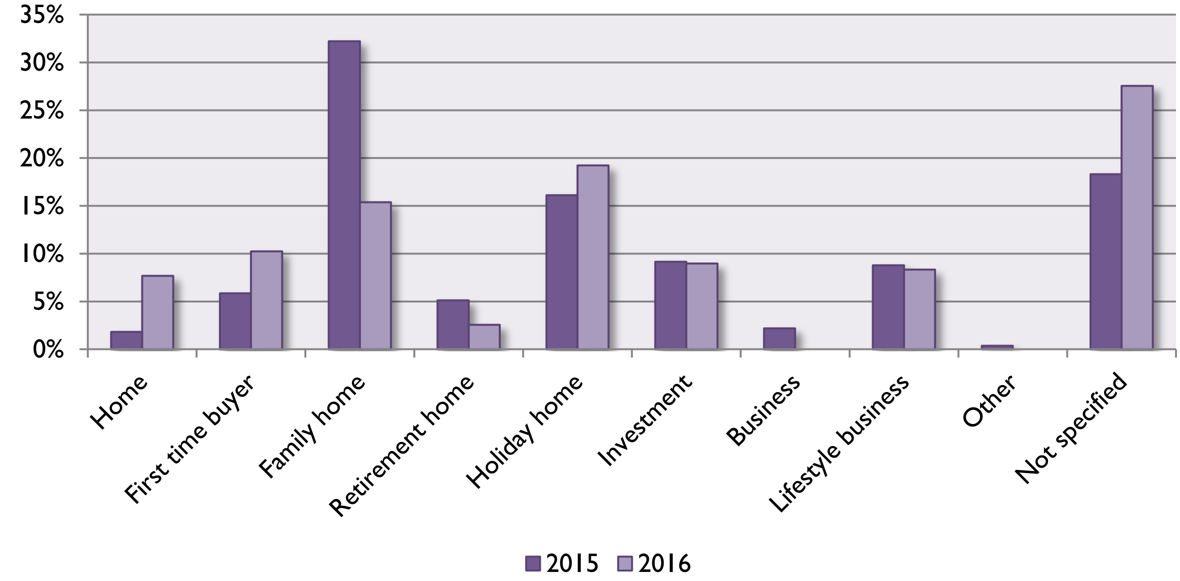


Figure 28). It should be noted that this data is highly qualitative in nature, with different estate agents choosing to market their clients' property in different ways. However, given the abundance of large detached properties available, it is unsurprising to find few houses marketed to first time buyers. It is also significant that a relatively high proportion of properties are marketed as potential holiday homes, although unsurprising given the relatively high proportion of such homes within the National Park (**Figure 19**).

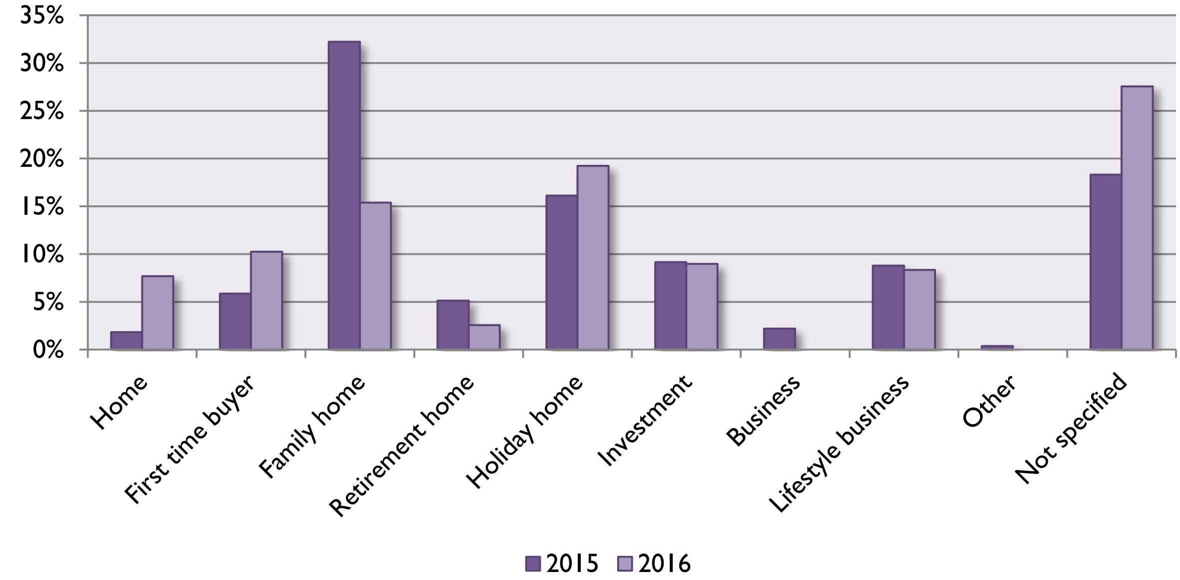


Figure 28 Marketing of properties within the Cairngorms National Park September 2015 and December 2016. Note that most properties are marketed to more than one type of buyer.

Together, data on incomes, median house prices and the availability of house types reveals that there is a significant issue within the National Park relating to the provision of affordable housing for first time buyers and those on or around median incomes.

Council Tax

Council Tax information can also provide an indication of affordability since bands are based on the value of property. Properties are put into one of eight bands (A-H), based on their value in April 1991:

Council tax band	Ranges of value	Council tax band	Ranges of value
A	Up to £27,000	E	£58,000 - £80,000
B	£27,000 - £35,000	F	£800,000 - £106,000
C	£35,000 - £45,000	G	£106,000 -212,000
D	£45,000 - £58,000	H	More than £212,000

Table 4 and **Table 5** show that there is a lower proportion of properties within bands A and B, significantly so in the case of band A.

Table 4 Number of properties by Council Tax band in the Cairngorms National Park in 2015.

Area of National Park	All Dwellings	Band A	Band B	Band C	Band D	Band E	Band F	Band G	Band H
ABD	1,912	204	275	195	373	330	323	195	17
Highland	7,259	328	1,392	1,715	957	1,447	847	534	39
Moray	422	116	59	98	82	49	9	4	5
PKC	540	33	94	117	111	89	41	35	20
CNPA	10,133	681	1,820	2,125	1,523	1,915	1,220	768	81
Scotland	256,4522	545,892	596,978	413,531	339,654	339,725	192,347	123,009	13,386

Table 5 Proportion of properties by Council Tax band in the Cairngorms National Park in 2015.

Area of National Park	All Dwellings	Band A	Band B	Band C	Band D	Band E	Band F	Band G	Band H
ABD	100%	10.7%	14.4%	10.2%	19.5%	17.3%	16.9%	10.2%	0.9%
Highland	100%	4.5%	19.2%	23.6%	13.2%	19.9%	11.7%	7.4%	0.5%
Moray	100%	27.5%	14.0%	23.2%	19.4%	11.6%	2.1%	0.9%	1.2%
PKC	100%	6.1%	17.4%	21.7%	20.6%	16.5%	7.6%	6.5%	3.7%
CNPA	100%	6.7%	18.0%	21.0%	15.0%	18.9%	12.0%	7.6%	0.8%
Scotland	100%	21.3%	23.3%	16.1%	13.2%	13.2%	7.5%	4.8%	0.5%

Time on Market

We also have data on the average length of time properties spent on the market. It can be seen that in Aviemore there is significant pressure for housing as properties are only on the market for an average of 53 days. In other parts of the National Park average times are much longer, with the greatest being in the Tomintoul and Glenlivet area where 638 days is the average. There may be a number of reasons for this, including the access to jobs and services the areas offer, but high asking prices are likely to compound this. For example, according to data the median asking price in the Tomintoul area in May 2017 was £195,000, more than 6 times the area's median household income.

All data in the following tables was collected on 24/05/2017 from Home.co.uk

Aberdeenshire Settlements

AB35 (Ballater & Braemar)

Summary	
Total properties for sale	27
Properties for sale listed in the last 14 days	3
Mean asking price	£334,815
Median asking price	£290,000
Mean time on market (days)	231 days
Median time on market (days)	78 days

Asking Price	Number of properties	Average time on market (days)
under £100,000	1	27
£100,000 to £200,000	9	79
£200,000 to £300,000	4	231
£300,000 to £400,000	7	298
£400,000 to £500,000	2	98
£500,000 to £1,000,000	7	575
over £1,000,000	0	-

AB36 (Strathdon)

Summary	
Total properties for sale	6
Properties for sale listed in the last 14 days	0
Mean asking price	£295,833
Median asking price	£217,500
Mean time on market (days)	164 days
Median time on market (days)	100 days

Asking Price	Number of properties	Average time on market (days)
under £100,000	0	-
£100,000 to £200,000	3	151
£200,000 to £300,000	2	246
£300,000 to £400,000	0	-
£400,000 to £500,000	0	-
£500,000 to £1,000,000	1	38
over £1,000,000	0	-

Highland Settlements

Aviemore

Summary	
Total properties for sale	5
Properties for sale listed in the last 14 days	2
Mean asking price	£192,200
Median asking price	£140,000
Mean time on market (days)	53 days
Median time on market (days)	56 days

Asking Price	Number of properties	Average time on market (days)
under £100,000	1	11
£100,000 to £200,000	3	48
£200,000 to £300,000	0	-
£300,000 to £400,000	0	-
£400,000 to £500,000	1	108
£500,000 to £1,000,000	0	-
over £1,000,000	0	-

Grantown-on-Spey

Summary	
Total properties for sale	12
Properties for sale listed in the last 14 days	2
Mean asking price	£289,667
Median asking price	£290,000
Mean time on market (days)	317 days
Median time on market (days)	169 days

Asking Price	Number of properties	Average time on market (days)
under £100,000	1	325
£100,000 to £200,000	2	487
£200,000 to £300,000	4	130
£300,000 to £400,000	3	589
£400,000 to £500,000	2	112
£500,000 to £1,000,000	0	-
over £1,000,000	0	-

PH21 (Kingussie & Kincarig)

Summary	
Total properties for sale	13
Properties for sale listed in the last 14 days	3
Mean asking price	£232,077
Median asking price	£190,000
Mean time on market (days)	170 days
Median time on market (days)	53 days

Asking Price	Number of properties	Average time on market (days)
under £100,000	1	52
£100,000 to £200,000	7	202
£200,000 to £300,000	2	54
£300,000 to £400,000	1	517
£400,000 to £500,000	2	2
£500,000 to £1,000,000	0	-
over £1,000,000	0	-

PH20 (Newtonmore)

Summary	
Total properties for sale	16
Properties for sale listed in the last 14 days	0
Mean asking price	£521,281
Median asking price	£402,500
Mean time on market (days)	327 days
Median time on market (days)	289 days

Asking Price	Number of properties	Average time on market (days)
under £100,000	4	408
£100,000 to £200,000	0	-
£200,000 to £300,000	3	303
£300,000 to £400,000	1	39
£400,000 to £500,000	5	341
£500,000 to £1,000,000	2	321
over £1,000,000	1	313

Moray Settlements

AB37 (Tomintoul & Glenlivet)

Summary	
Total properties for sale	15
Properties for sale listed in the last 14 days	0
Mean asking price	£190,467
Median asking price	£195,000
Mean time on market (days)	638 days
Median time on market (days)	425 days

Asking Price	Number of properties	Average time on market (days)
under £100,000	3	723
£100,000 to £200,000	7	876
£200,000 to £300,000	4	299
£300,000 to £400,000	1	68
£400,000 to £500,000	0	-
£500,000 to £1,000,000	0	-
over £1,000,000	0	-

Perth and Kinross Settlements

PH18 (Blair Atholl)

Summary	
Total properties for sale	10
Properties for sale listed in the last 14 days	0
Mean asking price	£140,795
Median asking price	£129,975
Mean time on market (days)	388 days
Median time on market (days)	244 days

Asking Price	Number of properties	Average time on market (days)
under £100,000	4	369
£100,000 to £200,000	4	524
£200,000 to £300,000	1	158
£300,000 to £400,000	1	292
£400,000 to £500,000	0	-
£500,000 to £1,000,000	0	-
over £1,000,000	0	-

Origin of Buyers

The origins of house buyers within the Badenoch and Strathspey Housing Market Area (HMA) (**Table 6**) is available from Highland Council**.** The data shows that the around half of buyers within Badenoch and Strathspey were already resident within the Highland Council area, with 45% coming from the HMA itself. This is relatively low compared with Highland as a whole, where 71% of buyers are moving within the authority area. Another feature particular to the Badenoch Strathspey HMA is the relatively high proportion of migrants from the rest of Scotland, which is 10% higher than any other HMA within Highland. Migrants from the rest of the UK and overseas are around the Highland average.

Table 6 Origins of House Buyers in Badenoch and Strathspey 2003-1012 (Highland Council, 2015). Percentages may not sum due to rounding.

HMA of House	Within HMA	Rest of Highland	Rest of Scotland	Rest of UK	Overseas	Unknown	All sales (100%)
Badenoch and Strathspey	45%	5%	31%	13%	1%	4%	2,309
Highland	N/A	71%	15%	11%	1%	3%	32,583

New Build

Between 2000 and 2008 the average completion rate in the National Park was just under 130 dwellings per year. However, the number of fell sharply following the 'credit crunch' in 2008 and has resulted in an average annual completion rate of around 70 new dwellings. Taken over the whole period, the average annual completion rate was about 100 new dwellings (**Figure 29**). While an upward trend has been identified since 2013, it is likely that the ending of the Government's Help to Buy Scheme (Scotland) in 2016, combined with continued constraints on mortgage availability, may dampened confidence in the housing market and limit the development of new homes.

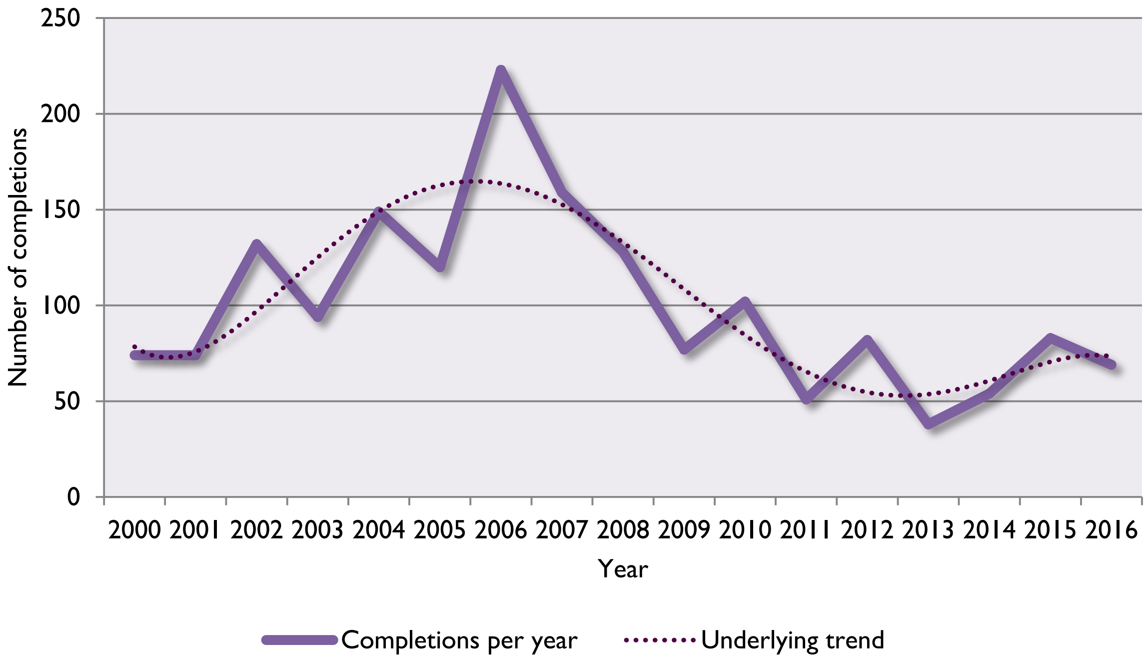


Figure 29 Number of completed dwelling per year in the Cairngorms National Park (Source: Local Authorities).

Being the area of the National Park in which most development takes place, completions in the Highland area of the National Park heavily influence this trend with development peaking in 2006, and falling to a nadir in 2013 (**Figure 30**).

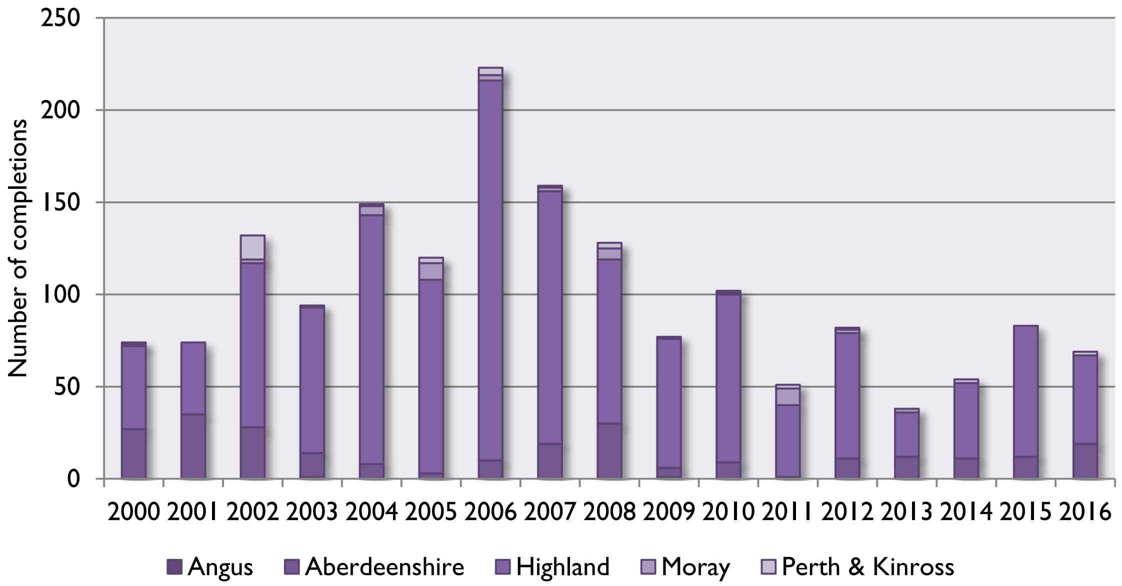


Figure 30 Number of competed dwelling per year in the Cairngorms National Park by Local Authority area (Source: Local Authorities).

Table 7 Number of completed dwellings by 5 year period in the Cairngorms National Park by Local Authority area (Source: Local Authorities).

Local Authority Area	**2000-2004**	**2005-2009**	**2010-2014**	**2015-2016**	**2000-2015**
Angus	1	1	0	0	2
Aberdeenshire	111	67	44	31	253
Highland	387	607	263	119	1,376
Moray	8	21	14	0	43
Perth & Kinross	16	11	6	2	35
Total	523	707	327	152	1,640

Table 8 Mean annual completion rates by 5 year periods (representing Local Plan periods), plus the most recent 2 years (the current LDP period), for the Cairngorms National Park by Local Authority area (Source: Local Authorities).

Local Authority Area	**2000-2004**	**2005-2009**	**2010-2014**	**2015-2016**	**2000-2016**
Angus	0.2	0.2	0	0	0.1
Aberdeenshire	22	13	9	15.5	14.9
Highland	77	121	53	59.5	80.9
Moray	2	4	3	0	2.5
Perth & Kinross	16	2	1	1	2.1
Total	104	141	65	76	100.5

The number of affordable houses completed across the whole National Park is not available, however information for Badenoch and Strathspey is. According to data from Highland Council, since 2004 of the 2005 dwellings completed in the area, 335 met some form of affordable criteria (**Figure 31**). It is unsurprising to find that the completion rates in affordable housing broadly correlate with overall completion rates.

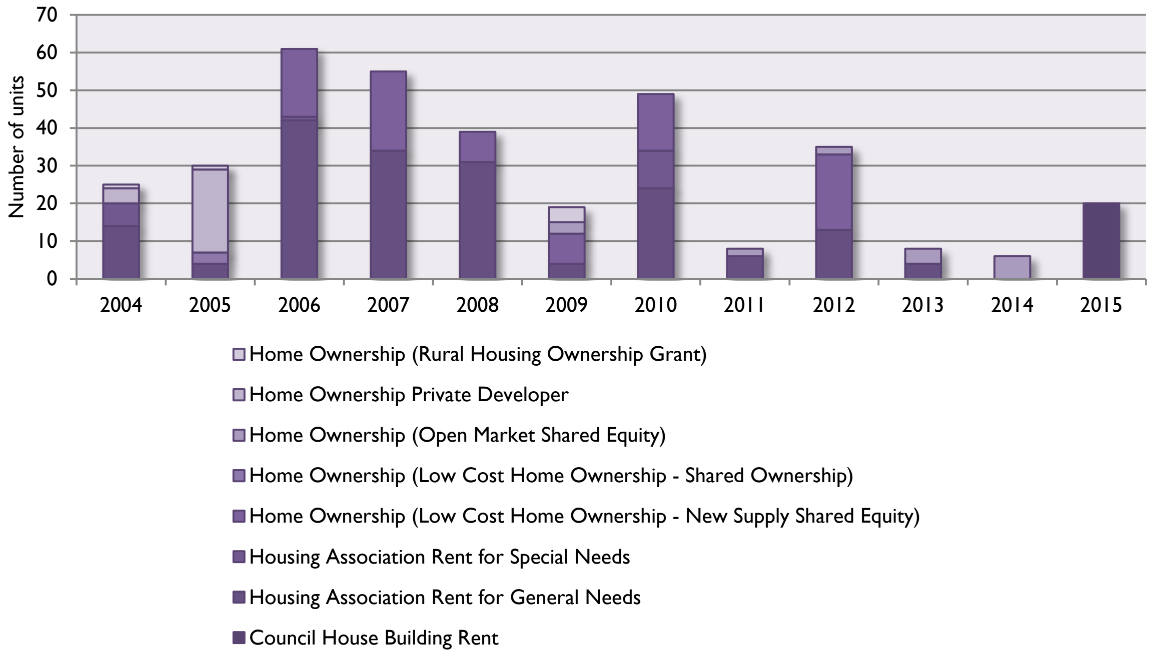


Figure 31 Affordable housing completions by tenure type in Badenoch and Strathspey (Source: Highland Council).

Ineffective Stock

In 2015 the National Park had a higher proportion of ineffective stock (the sum of second homes and vacant dwellings) than the rest of Scotland (about 17% and 4% respectively) and indeed its surrounding Local Authorities (Figure 32)

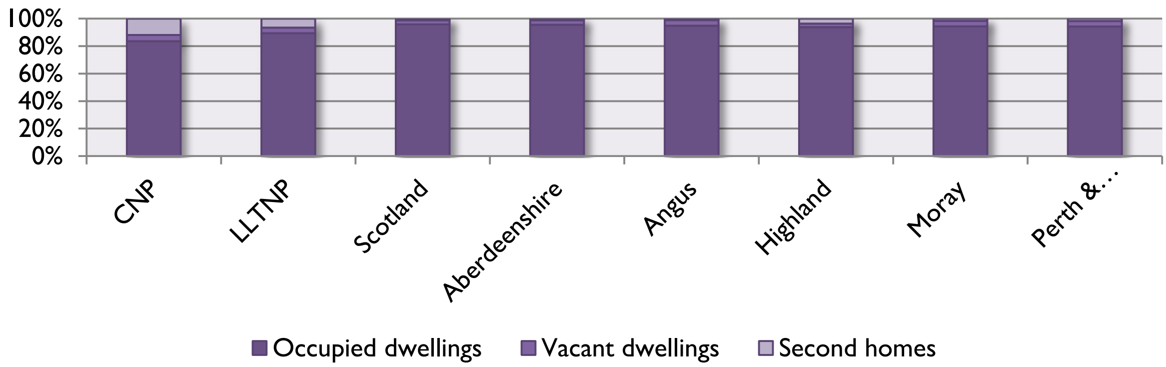


Figure 32 Dwelling occupancy types in the Cairngorms National Park, comparable authorities and Scotland in 2015 (**Source**: http://www.sns.gov.uk/).[8],[9]

[8] CNP: Cairngorms National Park; LLTNP: Loch Lomond and Trossachs National Park.

[9] Second homes are defined as dwellings that are subject to a Council Tax discount of between 10 per cent and 50 per cent due to being second homes. This includes self-catering holiday accommodation available to let for a total of less than 140 days per year. Second homes which are let out for 140 days or more are not included in these figures.

Second homes form the most significant proportion of this ineffective stock. Comparisons with Scotland's other authorities in fact demonstrates that the proportion of properties in second home ownership within the National Park, is significantly higher than elsewhere in Scotland (**Figure 33**), accounting for around 12% of all dwellings. Furthermore, the level of second homes in the Cairngorms National Park is much higher than its sister authority, the Loch Lomond and Trossachs National Park, where it is around 7%.

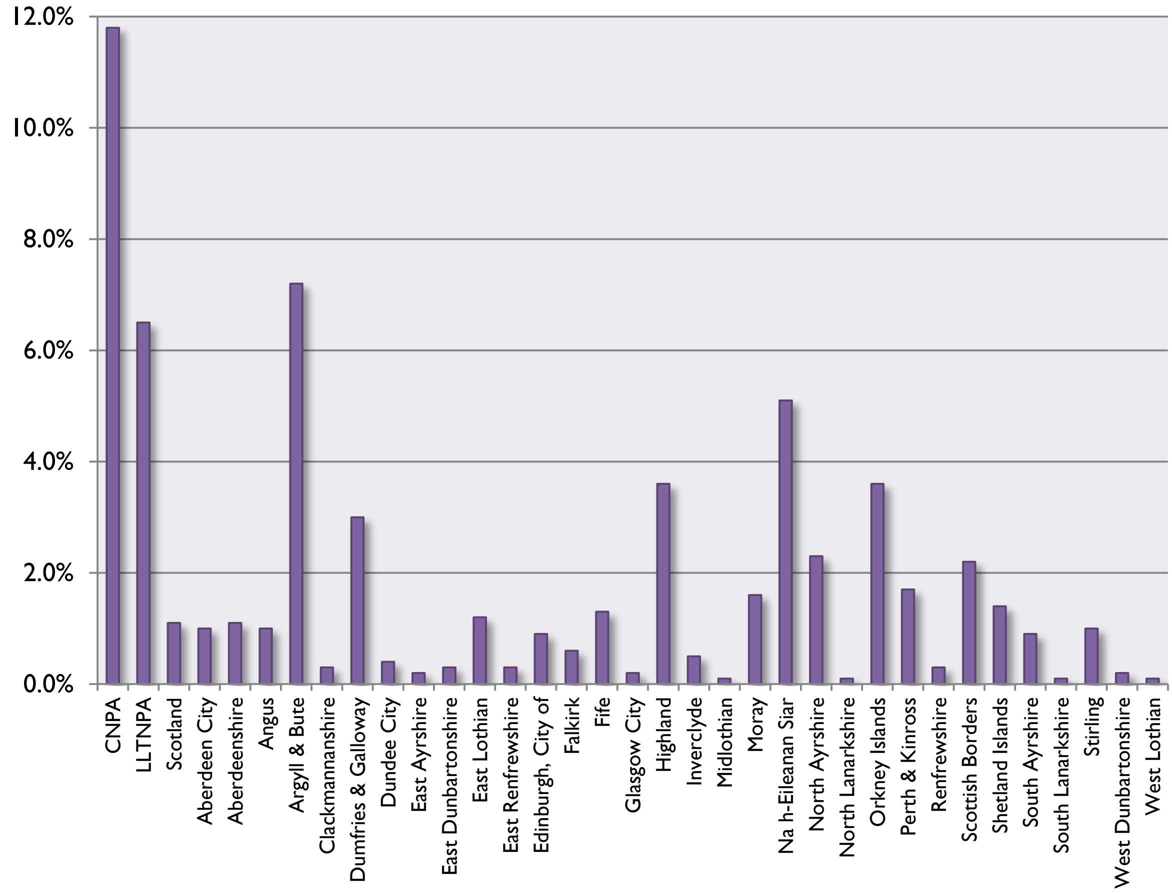


Figure 33 Proportion of dwellings used as second homes by authority area in Scotland in 2015 (**Source**: http://www.sns.gov.uk/).

The level of Second homes is not evenly distributed throughout the National Park, with the proportion of dwellings varying between 2% in data zone S01010544, which covers part of Grantown-on-Spey, and 21% in data zone S01010535, which covers Kincraig. **Table 9** and **Figure 34** shows that overall Badenoch and Strathspey has the lowest proportion of second homes, however, as it is the most densely developed part of the National Park, it is also home to the greatest number by some considerable margin. At a local level however, parts of Strathspey have levels of second homes that are closer area as higher than anywhere else in the National Park, with the areas around Boat of Garten, Glenmore, Knicraig, Nethy Bridge experiencing levels of around 18% to 21%.

Table 9 Ineffective housing stock in 2015 (Source: http://www.sns.gov.uk/).

Area of National Park	All Dwellings	Occupied Dwellings	Vacant Dwellings	Second Homes	Ineffective Stock
Aberdeenshire	1983	77%	11%	14%	25%
Highland	7246	75%	3%	11%	14%
Moray	422	78%	7%	14%	22%
Perth & Kinross	537	77%	10%	13%	23%
CNPA	10188	83%	5%	12%	17%

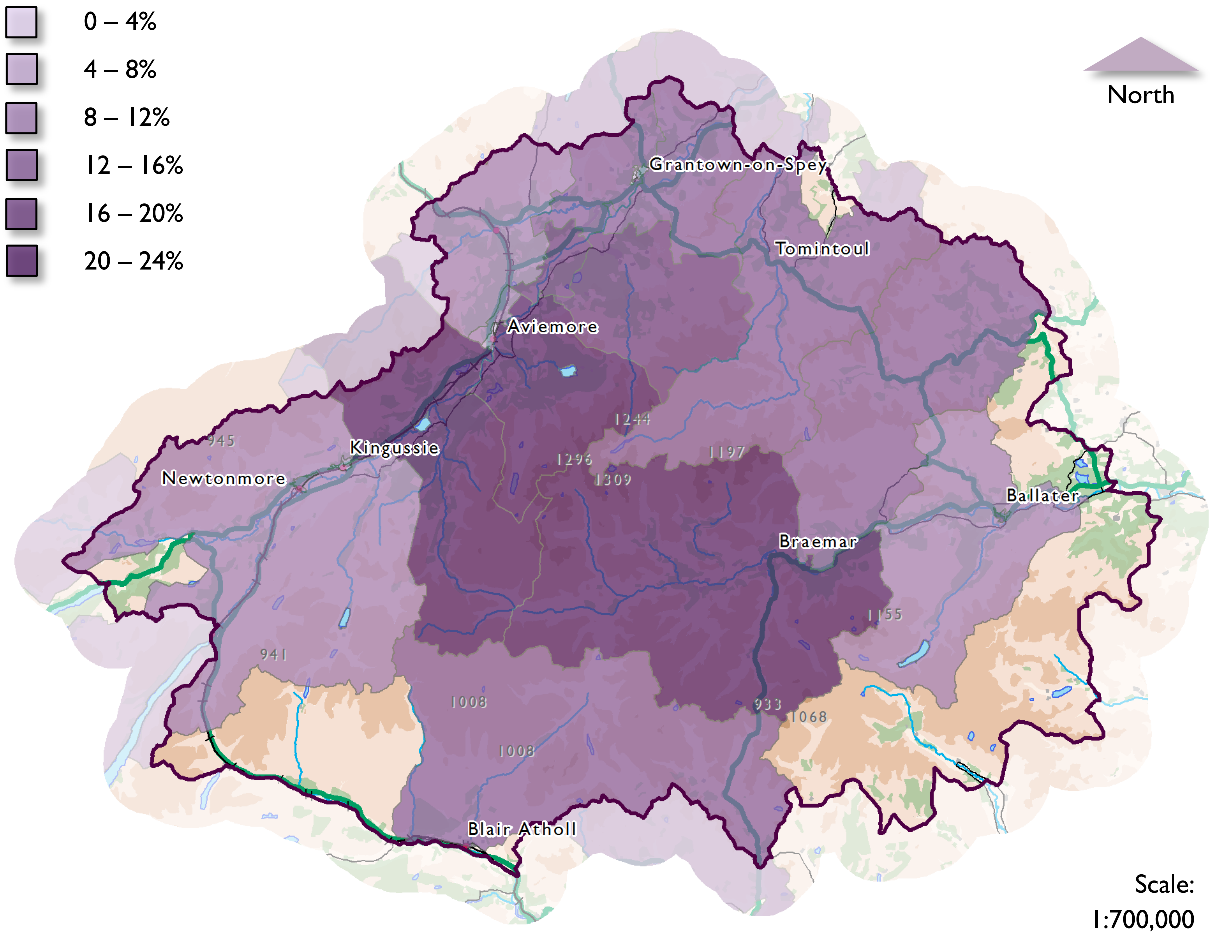


Figure 34 Proportion of second homes by data zone in 2015 (**Source**: http://www.sns.gov.uk/).

Further insight into the nature of second home ownership and ineffective stock can be derived from a comparison with other parts of Scotland.

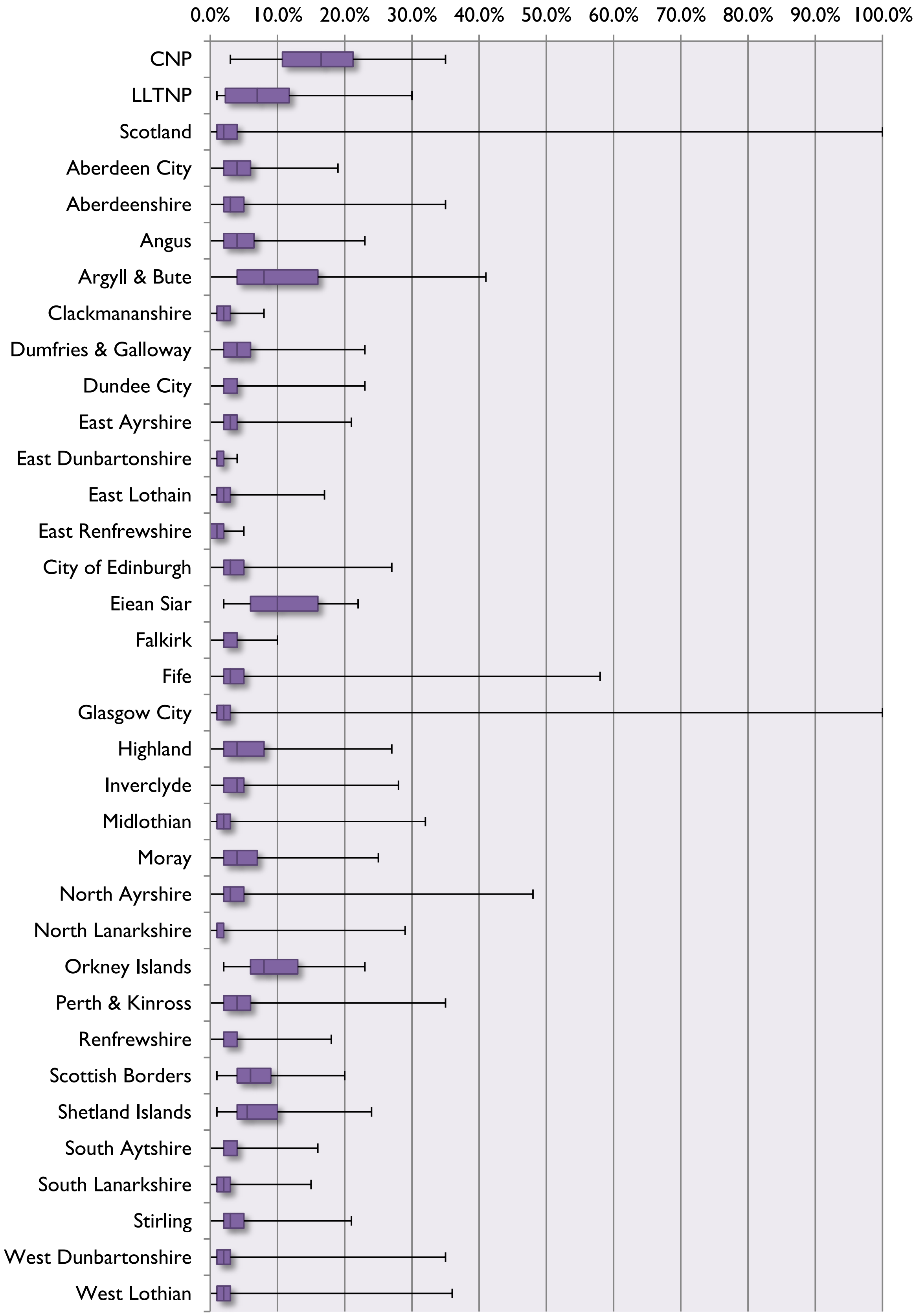


Figure 35, which shows the percentage of ineffective stock within each data zone and **Figure 36**, which shows the percentage of second homes, show that the median for both is higher than every other authority within Scotland.

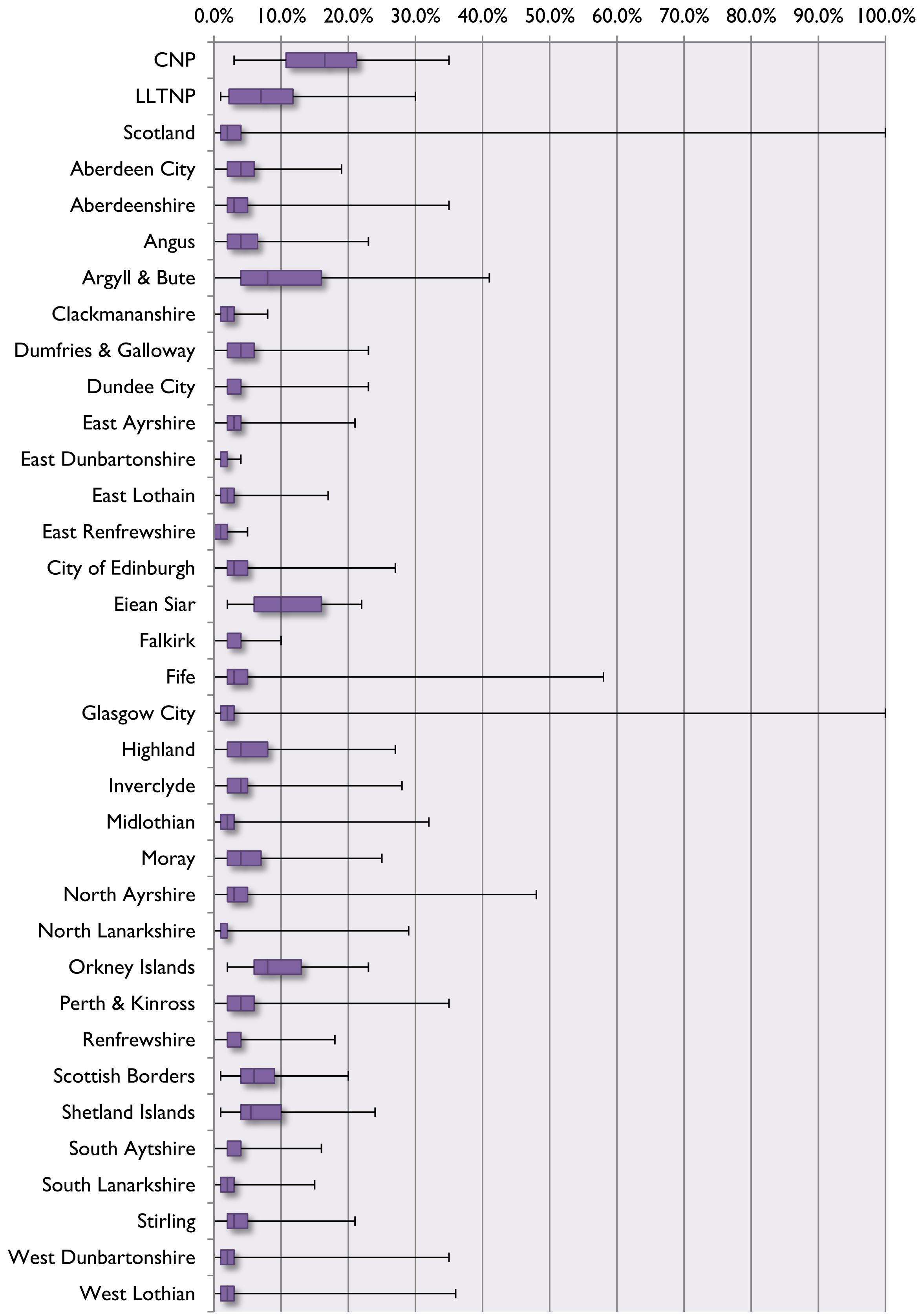


Figure 35 Percentage of dwellings in each data zone that are ineffective stock (vacant and second homes) in each authority area in 2015 (**Source**: http://www.sns.gov.uk/).

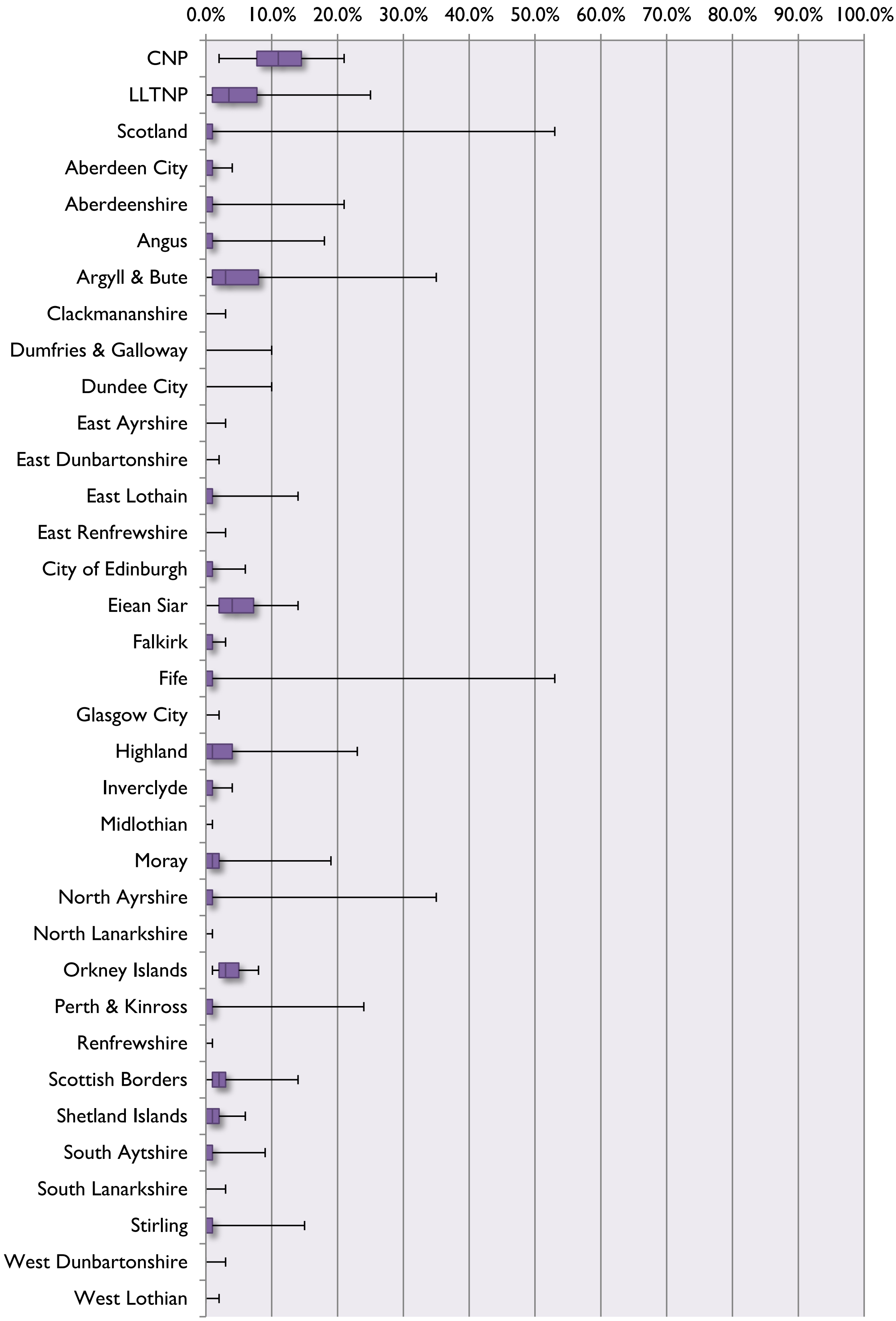


Figure 36 Percentage of dwellings in each data zone that are second homes in each authority area in 2015 (**Source**: http://www.sns.gov.uk/).

Second home ownership is problematic on two grounds. Firstly, unless sold second homes are not available to housing need. This is particularly an issue in terms of new-build housing as this housing is deliver specifically to meet existing and arising need. Secondly it is problematic because there is evidence to suggest that it has an impact on house prices. Bramley's (2008) research on the relationship between house prices and second homes in England suggests that for every 1% of the housing stock in second home-ownership, prices are 1.4% per cent higher per house.

The issue of second home ownership has been raised in a recent study commissioned by Highlands and Islands Enterprise (Ipsos Mori, 2017).

Data for residential properties paying non-domestic rates (i.e. domestic properties being used as self-catering tourist accommodation) is available for the Badenoch and Strathspey area (Figure 37), where 363 such units were found. As might be expected, the largest number of these properties are in Aviemore, however, there are also a number of settlements, which for their size, also host a relatively high number, namely Boat of Garten, Dulnain Bridge, Nethy Bridge, Kincraig and Laggan.

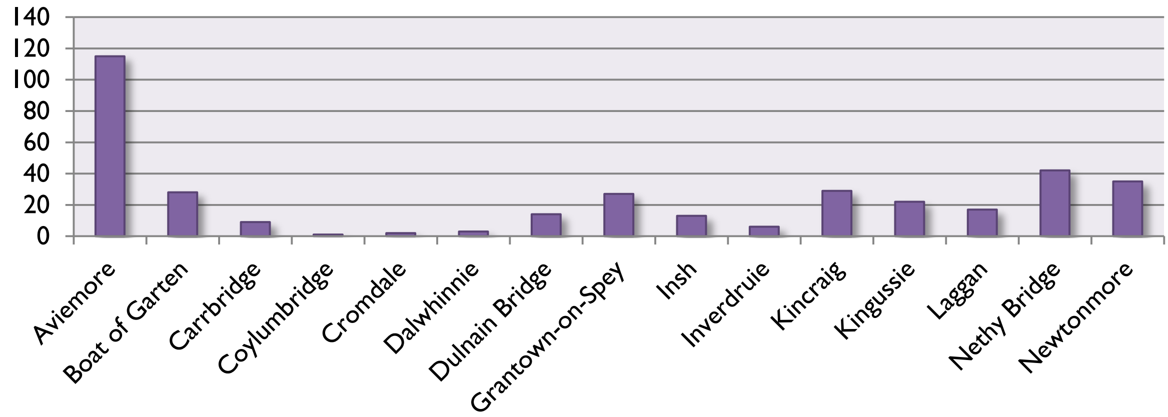


Figure 37 Number of self-catering units within Badenoch and Strathspey by nearest settlement, 2015 (**Source:** Highland Council).

Occupation and Tenure

Owner occupation is the dominant tenure, with the 2011 Census (Table Q405SC) indicating that around 65% of households are owner-occupiers (either owned outright or with a mortgage) (**Figure 38**). This is an increase of around 3% since 2001.

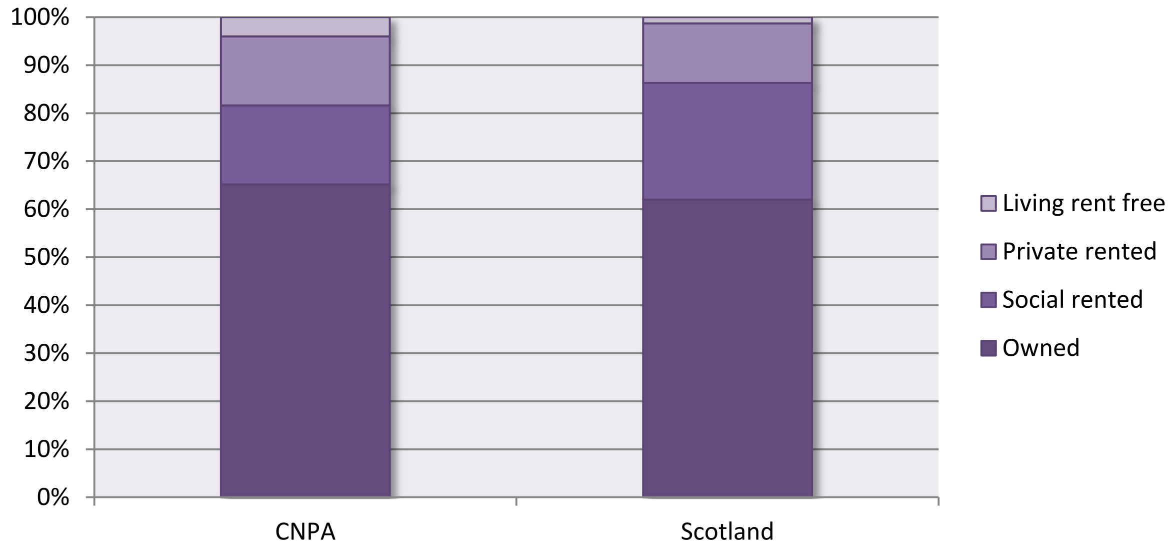


Figure 38 Housing tenue as a proportion of all stock (Census Table QS405SC).

Social rent is the next biggest tenure and accounts for around 16% of households (around the same as 2001). It remains high despite 1,069 council houses within the National Park being sold through Right to Buy schemes between 1980 and 2005 (**Figure 39**). Following recent legislative changes, from 1st August 2016 the Right to Buy will be abolished for all tenants in Scotland. Levels of social housing stock are however lower than elsewhere in Scotland. According to Highland Council there are currently 878 social rented units within Badenoch and Strathspey. The Council's HNDA (2015) also notes that there is a notably low proportion of 3 bed social rent units within the area.

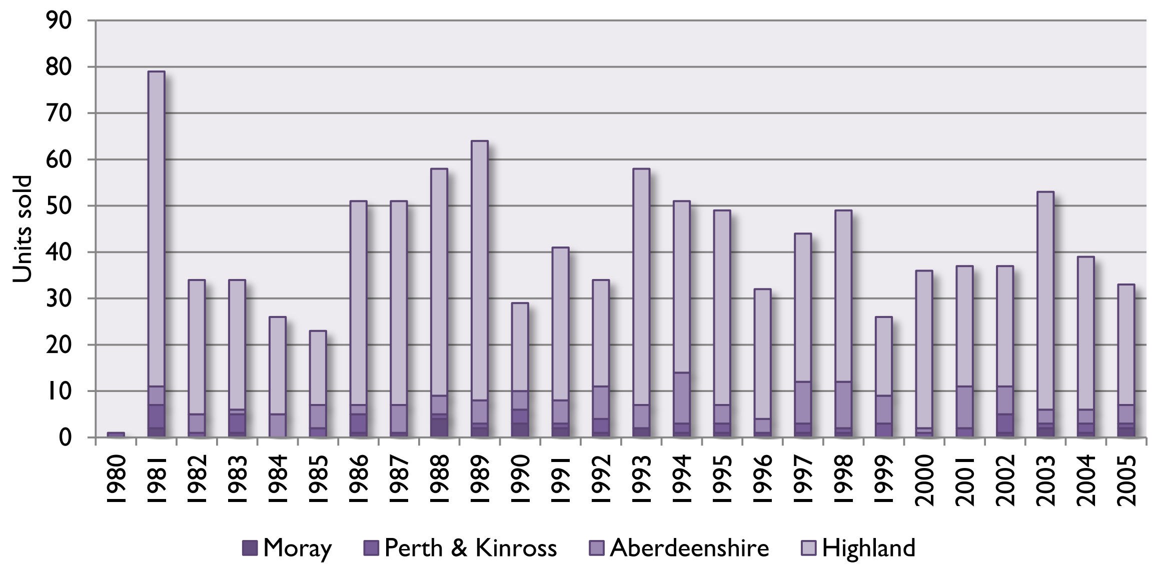


Figure 39 Council houses sold between 1980 and 2005 (**Source**: http://www.sns.gov.uk/).

Around 14% of households rent from the private sector, which is a fall of around 6% since 2001 (down from 20%). One unusual facet of the National Park's rented sector is the relatively high proportion of households renting from an employer of a household member. In 2011 these households represented 5% of the private rented market. It is likely that these households largely represent estate workers and seasonal workers in the tourism sector, where accommodation is often included with the job.

There was however a drop in this tenure class from 35% in 2001; the reasons for which are uncertain. In part it may represent a change in the categorisation of tenure definitions, for while the 2001 census records no households as living rent free, the 2011 indicates a level of 4%. Other causes may include changes in the working practices of estates and the sale of estate stock.

A survey of internet sources, including estate agents and property management websites and Gumtree, between 17th and 18th September 2015 found only 5 private properties for rent within the National Park, ranging in size from 2 to 4 bedrooms. While the median rent of this sample was £575 PCM, it is not possible to use it to build a robust evidence base on rental prices, as property is often advertised in locally published news sheets, social media and by word of mouth.

Table 10 shows variation in tenure between the different parts of the National Park, with levels of owner occupation above the national average in all but one of the Local Authority areas. No areas have levels of social renting above the national average, however, with the exception of Perth and Kinross, private sector renting is higher than the national average in all areas. In the case of Aberdeenshire and Moray, the levels of private renting are particularly high, equating to around 21% and 25% respectively.

Table 10 Housing tenue as a proportion of all stock in 2011 (**Source:** Census Table QS405SC).

Area of National Park	Owned	Social Rented	Private Rented	Living Rent Free
Aberdeenshire	56.6%	14.3%	21.3%	7.7%
Highland	66.9%	17.2%	12.7%	3.2%
Moray	58.8%	8.3%	25.4%	7.5%
Perth & Kinross	76.5%	17.0%	6.6%	0.0%
CNPA	65.2%	16.4%	14.4%	4.0%
Scotland	62.0%	24.3%	12.4%	1.3%

Property Sizes

Table 11 and **Table 7** show the numbers and proportions of different house sizes for all tenures across the National Park. The data indicates that at a National Park level, there are a higher proportion of large dwellings within the National Park and a lower proportion of small ones. In particular, there is a significantly smaller proportion of three roomed dwellings within the National Park than there are across Scotland as a whole.

Table 11 Number of properties by size in the Cairngorms National Park in 2014

Area of National Park	All Dwellings	One Room	Two Rooms	Three Rooms	Four Rooms	Five Rooms	Six Rooms	Seven Rooms	Eight Rooms	Nine Rooms	Ten or more rooms	Unknown
ABD	1,908	46	215	287	440	393	239	127	75	36	50	0
Highland	7,198	27	704	1,682	1,868	1,181	700	424	176	83	144	209
Moray	421	5	38	53	121	94	51	26	16	5	12	0
PKC	539	1	27	90	164	104	51	40	11	15	32	4
CNPA	10,066	79	984	2,112	2,593	1,772	1,041	617	278	139	238	213
Scotland	2,546,383	22,294	302,046	743,641	676,468	417,148	191,232	86,524	39,333	16,625	14,172	36,900

Table 12 Proportion of properties by size in the Cairngorms National Park in 2014.

Area of National Park	All Dwellings	One Room	Two Rooms	Three Rooms	Four Rooms	Five Rooms	Six Rooms	Seven Rooms	Eight Rooms	Nine Rooms	Ten or more rooms	Unknown
ABD	100%	2.4%	11.3%	15.0%	23.1%	20.6%	12.5%	6.7%	3.9%	1.9%	2.6%	0.0%
Highland	100%	0.4%	9.8%	23.4%	26.0%	16.4%	9.7%	5.9%	2.4%	1.2%	2.0%	2.9%
Moray	100%	1.2%	9.0%	12.6%	28.7%	22.3%	12.1%	6.2%	3.8%	1.2%	2.9%	0.0%
PKC	100%	0.2%	5.0%	16.7%	30.4%	19.3%	9.5%	7.4%	2.0%	2.8%	5.9%	0.7%
CNPA	100%	0.8%	9.8%	21.0%	25.8%	17.6%	10.3%	6.1%	2.8%	1.4%	2.4%	2.1%
Scotland	100%	0.9%	11.9%	29.2%	26.6%	16.4%	7.5%	3.4%	1.5%	0.7%	0.6%	1.4%

4.4 Identifying Housing Need

"*In the National Parks, local development plans should draw on the evidence provided by the HNDAs of the constituent housing authorities. National Park authorities should aim to meet the housing land requirement in full in their area. However, they are not required to do so, and they should liaise closely with neighbouring planning authorities to ensure that any remaining part of the housing land requirement for the National Parks is met in immediately adjoining housing market areas, and that a 5-year supply of effective land is maintained.*"

Paragraph 121, Scottish Planning Policy 2014

Although a certain level of data can be collected to identify issues to be addressed within the National Park, identifying robust estimates of the type and tenure of housing required is complicated by the fact that the CNPA is not responsible for the production of a Housing Need and Demand Assessment (HNDA). This responsibility falls to the Local Authorities that cover the National Park's area and therefore, evidence must be drawn from 5 separate HNDAs covering Aberdeenshire, Angus, Highland, Moray and Perth and Kinross. Naturally, this means that HNDAs are produced over and cover different time periods, do not always contain compatible or consistent data and can contain Housing Market Areas[10] (HMA) that cover geographical regions of contrasting character and size. Reconciling these studies is therefore often a difficult task in which gaps in information inevitably occur.

It should be noted that the scenario outputs from HDNAs do NOT automatically translate into the housing supply targets for Local Development Plans and Local Housing Strategies. It is the role of the Cairngorms National Park Authority and the five Councils that cover its area to consider the conclusions of this HNDA alongside some of the wider social, economic, environmental and physical considerations. Together these factors inform policy decisions about the scale of house building that is planned for and the locations where this is to be accommodated.

4.5 Housing Need & Demand

Highland Area

The greatest geographical area of the National Park falls within the Highland Council's local authority area. This area is also home to the majority of the National Park's population and is the area that has experienced the greatest population growth. The Highland HNDA (2015) identifies Badenoch and Strathspey as a HMA, the majority of which lies within the National Park's Boundary. The areas that lie outside of the National Park comprise:

- 153 km^2 around Advie, which contains 153 dwellings registered on the Council Tax database;
- Two areas, which combined cover 132 km^2 in the Monadhliath Mountains which have no dwellings; and
- 417 km^2 around Laggan, which contains 20 dwellings on the Council Tax database.

[10] Housing Market Areas are functional areas that represent the spatial area where the majority of people moving house (without changing employment) search and purchase housing.

97.6% of the housing stock in the HMA lies within the Park area and for most long term planning purposes the two can be considered to be equivalent.

Comparison of Scenarios

Highland Council's HNDA (2015) argues that population projections produced by NRS are based on the continuation of recent trends and, for the key parameter of migration, they are based on the average of the five years prior to the projection base year. For the 2012 projections this is the period mid-2007 to mid-2012 which spans the credit crunch and recession. These economic factors, the Council argues, had a significant impact on migration to and from Highland during the period. The net result is that even the high migration scenario used by National Registers of Scotland is likely to underestimate the growth of Highland. Use of the lower household growth rates will not result in the generous supply of housing land required by Government policy, and the ensuing shortage of housing land could well present a barrier to economic growth (Highland Council, 2015).

Therefore, in addition to the low, principal and high growth scenarios, the HNDA also considers a 'continued growth' scenario that aims to deliver the 20 year historic average rate of house building (1,180 houses per year over the whole Authority area) during the first half of the period but recognises that demand will fall during the second half as the margin of deaths over births increases. The Highland total has been allocated to individual HMAs in the same proportion as the high migration scenario already calculated.

Table 13 and Table 14 below compare the HNDA's low, principal, high and continued growth scenarios. The figures for the low projection show that much of the need and requirement is coming from changing circumstances of the existing population, as well as from new households moving into Highland.

The HNDA's assumption is that the backlog of existing affordable need will be removed over 10 years, and therefore the103 units identified as backlog in Badenoch and Strathspey have been split evenly between the 2015-2019 and 2020-2024 time periods in all four scenarios in Table 13 and Table 14. This accounts for the relative insensitivity of the need for social rented housing to the choice of scenario, with the need rising from 113 (low) to 156 (continued growth) in the 2015-2019 period and from 108 (low) to 169 (continued growth) in the 2020-2024 period.

Although the existing need is also included in the requirement, its proportion of the total is lower and the total requirement varies significantly with the scenario, rising from 277 (low) to 438 (continued growth) in the 2015-2019 period and 256 (low) to 457 (continued growth) in the 2020-2024 period. The low and principal scenarios are considered to be unlikely unless we experience another significant economic setback, but even in this eventuality there would still be a requirement for between 70 and 89 dwelling per year in the 2015-2019 period and 74 and 91 new dwellings in the 2020-2024 period.

Table 13 and Table 14 show that the differences between the scenarios widen during the full 20 years of the HNDA, largely because population growth stagnates under the two lower growth scenarios. The requirement falls each year during the later time periods. In addition, the existing need for social rented housing is removed during the first 10 years and there are no equivalent figures in the second half of the period.

Table 13 Comparison of Highland HNDA Scenarios for Badenoch and Strathspey HMA (Highland Council, 2015)[11].

Growth Scenario	2015-2019					2020-2024					2025-2029					2035-2034					2015-2034				
	SR	BMR	PR	OO	TR	SR	BMR	PR	OO	TR	SR	BMR	PR	OO	TR	SR	BMR	PR	OO	TR	SR	BMR	PR	OO	TR
Low Growth	113	36	78	50	277	108	33	70	45	256	50	27	57	35	169	32	17	32	19	100	303	114	238	149	804
Principal Growth	120	41	88	57	306	121	40	86	54	301	65	35	73	45	218	48	26	48	29	151	353	142	296	185	976
High Growth	132	47	103	66	348	139	52	109	69	369	71	38	73	43	225	71	38	73	43	225	429	185	383	239	1,236
Continued Growth	156	62	134	86	438	169	69	136	83	457	121	66	136	83	406	108	58	110	65	341	553	254	525	327	1,659

Table 14 Comparison of Highland HNDA Scenarios for Badenoch and Strathspey HMA – annual averages (Highland Council, 2015).

Growth Scenario	2015-2019					2020-2024					2025-2029					2035-2035					2015-2034				
	SR	BMR	PR	OO	TR	SR	BMR	PR	OO	TR	SR	BMR	PR	OO	TR	SR	BMR	PR	OO	TR	SR	BMR	PR	OO	TR
Low Growth	23	7	16	10	55	22	7	14	9	51	10	5	11	7	34	6	3	6	4	20	15	6	12	7	40
Principal Growth	24	8	18	11	61	24	8	17	11	60	13	7	15	9	44	10	5	10	6	30	18	7	15	9	49
High Growth	26	9	21	13	70	28	10	22	14	74	17	9	20	12	45	14	8	15	9	45	21	9	19	12	62
Continued Growth	31	12	27	17	89	34	14	29	18	91	24	13	27	17	81	22	12	22	13	68	28	13	26	16	83

[11] SR: Social Rent; BMR: Below Market Rent; PR: Private Rent: OO: Owner Occupation; TR: Total Requirement.

Aberdeenshire Area

The current Aberdeen City and Shire HNDA was published in 2011. At the time of writing a new draft HNDA had been submitted to the Centre for Housing Market Research, however this is yet to be granted the status of robust and credible. We will take the findings of this document once it is finalised and its scenarios have been found robust and credible. The HNDA (2011) identifies just two HMAs, Aberdeen HMA and the Rural HMA. The area of Aberdeenshire within the Cairngorms National Park has been included in the Rural HMA. The HNDA argues that this was necessary because the Aberdeenshire Local Housing Strategy covers the whole of the council area and much of the necessary data is not available for small areas. It argues that the numbers involved are very small (approximately 3,200 people in 2008, 0.7% of the total population of the area, or 2.4% Rural HMA) so it does not have any significant effect to the outcome of the assessment.

The HNDA estimates an annual housing need of 632 new dwellings within the whole Rural HMA, of which approximately 33% are affordable (Aberdeen City and Shire Strategic Planning Authority, 2011). If this figure is disaggregated by the proportion of the HMA's population living within and outwith the National Park, an estimated annual housing need of 15.2 units is reached. It is recognised that the number of units within the National Park is too low for it to be defined as a functional HMA and that this is a crude method of estimating housing need, however it does give a broad indication of the number of houses the CNPA needs to plan for. Over the 20 year projected period therefore, there is an estimated need for a total of 304 new dwellings. This is in line with historic trends as since 2000 there has been an average completion rate of 15 dwellings per year (Figure 40 and Table 16).

Table 15 Annual housing need in Aberdeen City and Shire's HNDA's Rural HMA 2010-2019 (Aberdeen City and Shire, 2011) and estimated share for area within the CNP based on the 2008 population quoted in the HNDA.

	Aberdeen City and Shire HNDA	Estimated CNPA share
Annual Housing Requirements	632	15.2
Annual estimate of affordable housing	206	5.1
Annual Estimate market housing	426	10.1

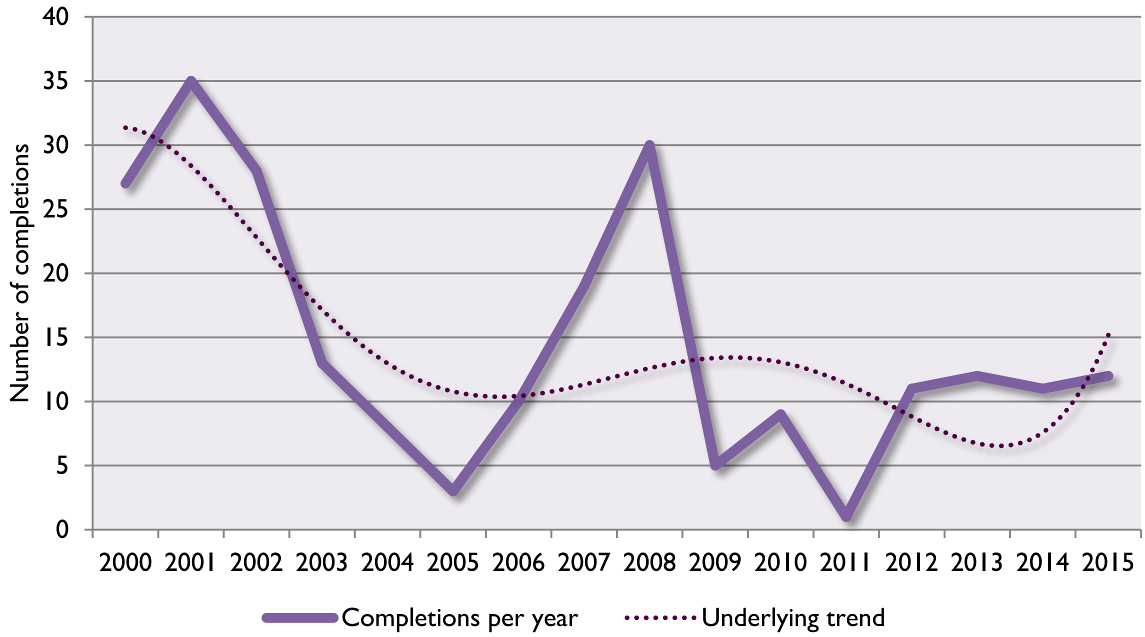


Figure 40 Annual completions in the Aberdeenshire area of the Cairngorms National Park. Source: Aberdeenshire Council.

Table 16 Completions by 5 year period in the Aberdeenshire area of the Cairngorms National Park. Source: Aberdeenshire Council.

Local Authority Area	**2000-2004**	**2005-2009**	**2010-2014**	**2015-**	**2000-2015**
Number of completions	111	67	44	12	234
Annual average completions	22	13	9	12	15

However, this method of disaggregating the HMA's need is problematic, since it is not the headline population that generates a policy response, but the rate and scale at which change occurs. In 2016 the National Records of Scotland published the results of a one-off research project to produce population and household projections for sub-council areas (National Records of Scotland, 2016). Caution should be taken for sub-council area projections because small areas show more short-term change than larger areas and in the projections, these trends are continued for the length of the projection. As the process of change is cumulative, the reliability of projections decreases over time and for this reason caution should be used when considering these projections in the longer-term.

Therefore, although projections have been prepared to 2037 (25 years ahead), in line with the sub-national projections at council area and National Park level, the main results are reported to 2026. Projections become more uncertain the further ahead they project, especially for smaller areas, as these populations are affected more by the migration assumptions, therefore the results to 2026 are considered more reliable than the longer-term projections and are presented in this report. Indeed, given the small population of the Aberdeenshire population within the National Park, caution should be exercised in the interpretation of all statistics relating to it.

Due to its very small population the Aberdeenshire area of the National Park falls within a broader statistical area that covers Aboyne, Upper Deeside and Donside.

Table 17 Projected population change for Aboyne, Upper Deeside and Donside sub-council area (NRS, 2016).

Aboyne, Upper Deeside and Donside Mid-year Estimate 2012	Aberdeenshire area of CNP Mid-year Estimate 2012	% of Aboyne, Upper Deeside and Donside 2012 population in CNP	Aboyne, Upper Deeside and Donside Projected Population 2026	Aboyne, Upper Deeside and Donside Projected Population Change
11,656	3,134	26.9%	12,134	4.1%

Table 18 Projected household change for Aboyne, Upper Deeside and Donside sub-council area (NRS, 2016).

Estimate Households 2012	Assumed Household Size 2012	Projected Households 2026	Assumed Household Size 2026	Projected Household Change
5,002	2.33	5,413	2.24	8.2%

The level of population growth projected for Aboyne, Upper Deeside and Donside sub-council is considerably higher than that experienced by the Aberdeenshire area of the National Park over recent years, with mid-year population estimates suggesting that between 2001 and 2014 the population of the area remained broadly stable with no statistically significant change over the period (an estimated net increase of 66 persons, or 2.1%) (Figure 41). There has also been year to year variability population growth and decline so it is difficult to tell what the long term trend for the area is likely to be.

The rate of growth in the number of households has also historically been lower, with numbers growing by around 1.2% between 2008 and 2014 (Figure 47). Over the same period average household sizes appear to have remained broadly level, remaining around 2.1 persons per household over the period[12].

[12] Calculated as the ratio between mid-year population estimates (Figure 28) and annual estimates of occupied dwellings (Figure 29).

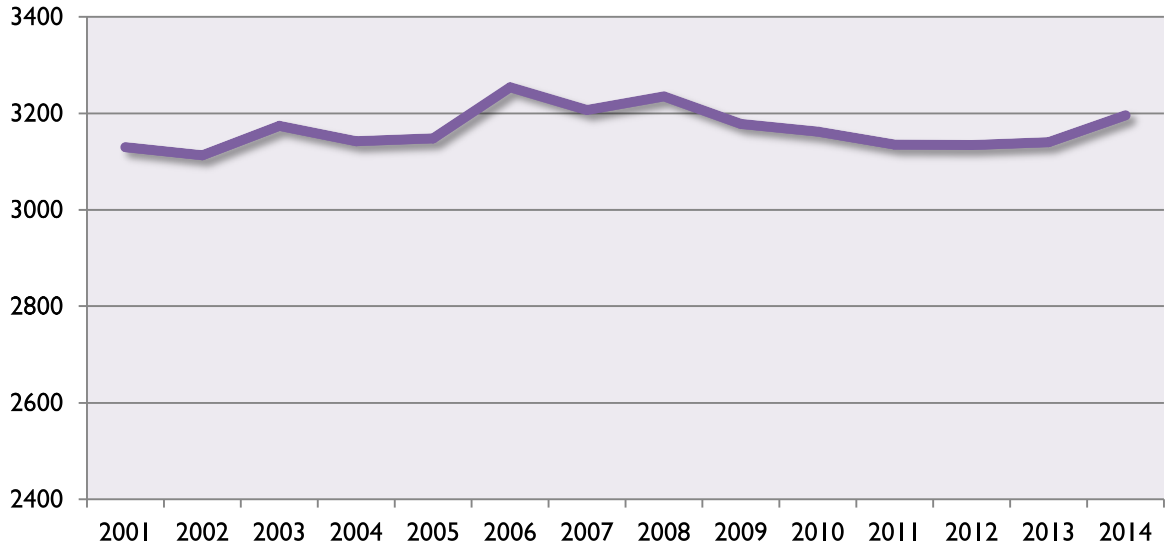


Figure 41 Mid-year estimates of the total population of the Aberdeenshire area of the Cairngorms National Park 2001-2014. Source: www.sns.gov.uk.

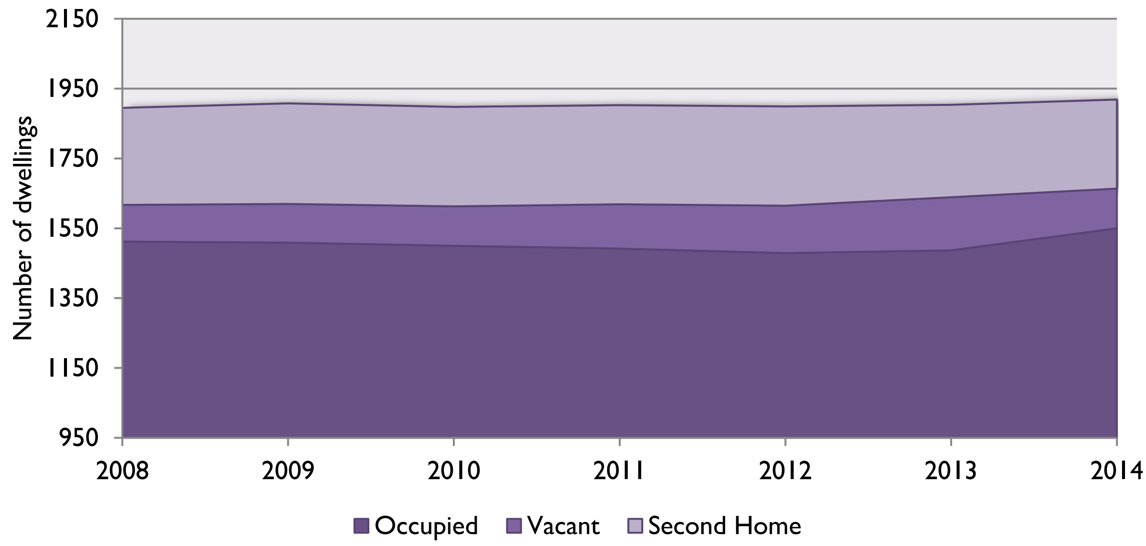


Figure 42 Changes in household occupation in the Aberdeenshire area of the Cairngorms National Park 2008-2014. Source: www.sns.gov.uk.

The overall growth in the Aboyne, Upper Deeside and Donside sub-council area is likely to be heavily influenced by population and household change within its largest settlement, namely Aboyne, which lies outwith the National Park and whose population grew by around 4.8% between 2001 and 2014 (Figure 43 and Figure 44).

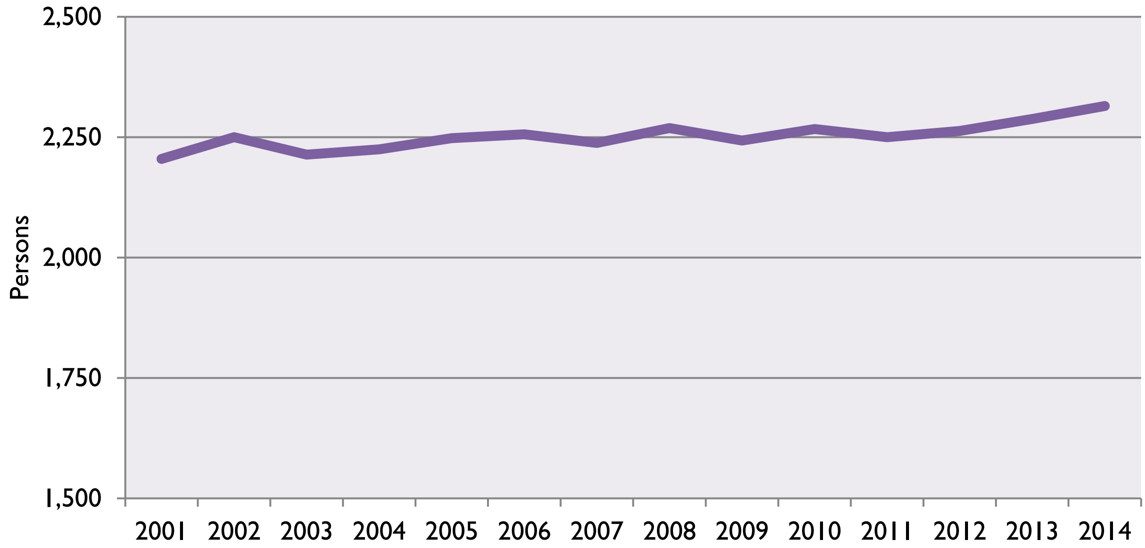


Figure 43 Mid-year estimates of the total population of Aboyne 2001-2014.

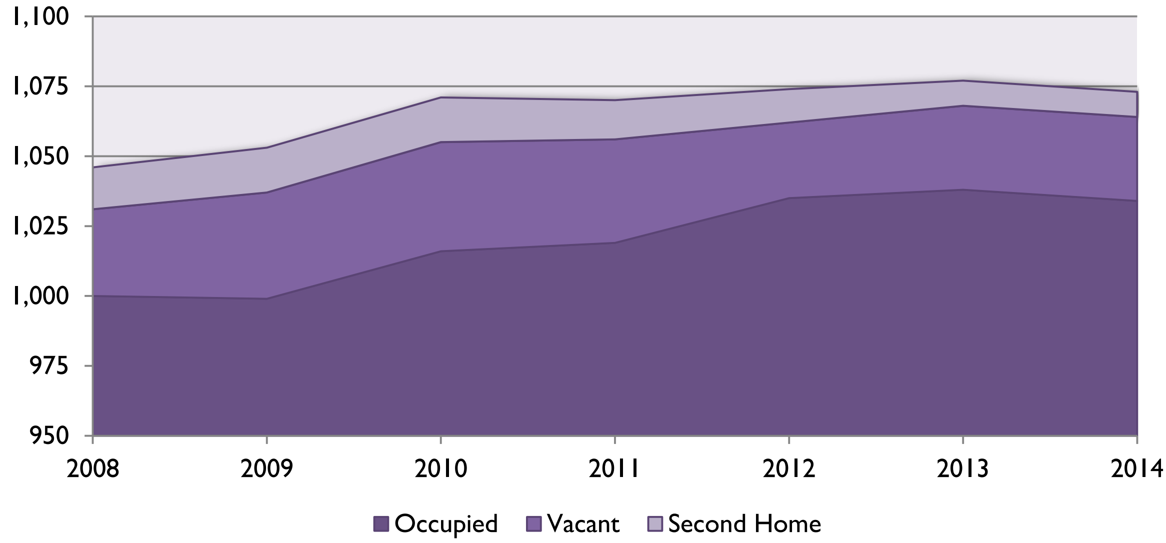


Figure 44 Changes in household occupation in Aboyne 2008-2014. Source: www.sns.gov.uk

Given what we know about the nature of population and household change in the Aberdeenshire area of the National Park it is considered best to adopt a low growth scenario for housing provision in this part of the National Park. Taking account of the estimated population change in this area and the overall principal population projection for the National Park itself (Figure 9), an assumed population increase of 1% between 2012 and 2037 is not unreasonable.

Under this scenario the projected fall in average household size is the greatest driver for household change. Working on the assumptions of NRS' principal projection, the average household size across the National Park is projected to fall from 2.15 in 2012 (the base date for NRS' projections) to 2.02 in 2025, which represents the likely end of the next LDP's lifespan, and 1.95 by 2037, which represents the end of the projection period. While calculations of household size based on mid-year estimates and indicate a higher average household size in 2014, it is considered best to use NRS' estimated and projected household size, since these are derived from a larger sample population and are therefore likely to be more robust. Furthermore, it is worth noting that it is not the headline figures that are important, but the rate and scale of change and this is provided by the NRS projections. Table 19 provides an outline of these calculations.

Table 19 Projected change in households in the Aberdeenshire area of the National Park when applying NRS' (2014) assumptions on average household sizes.

2012 Mid-year estimate	2012 Occupied dwellings	Projected population 2025	Projected population 2037	Projected households 2025	Additional households 2025	Average annual dwellings	Total 2020-2025
3,134	1,479	3,142	3,165	1,555.4	76.4	5.5	27

On the basis of these estimates we may also consider the scenarios for Housing need identified for the Aberdeen City and Shire HNDA Update (2011). Again, it should be noted that this is a blunt means of assessing need and demand within the area and therefore further investigation is necessary.

Table 20 Application Table 16's estimates to Aberdeen City and Shire HNDA Update (2011) for the Rural HMA – Total Requirement for 5 year period.

Annual Housing Requirements	Annual estimate of affordable housing	Annual Estimate market housing
5.5	1.8	3.7

One means of testing whether or not the estimates in Table 19 and Table 30 are realistic is to compare them against the council house waiting list maintained by Aberdeenshire Council. This information is available on a settlement basis (Table 21). It should be noted that the information in Table 21 counts only those applicants with a need for rehousing and applicants are counted on the basis of their first area of choice only. This means that there is no double counting where applicants have listed a number of areas for rehousing. The data does identify a need for affordable housing within the National Park area; furthermore it identifies the need for a large proportion of 1 bedroom units.

Table 21 Total CHR Applications by Apartment Size (Mainstream and Sheltered) in the Aberdeenshire part of the National Park at 31st March 2016. Source: Aberdeenshire Council.

Settlement	Applications by dwelling size (bedrooms)							Total CHR Lets 2015/16	Pressure Ratio
	1	2	3	4	5+	Unassessed	Total		
Ballater	60	15	7	1	2	2	87		
Braemar	15	6	3	1	0	1	26		
Crathie	0	1	0	0	0	0	1		
Strathdon	3	0	0	0	0	0	3		
Total	**78**	**22**	**10**	**2**	**2**	**3**	**117**		

Another factor that needs to be taken into account is the level of ineffective Stock within the area and in particular the level of second home ownership. According to the most recent estimates (2014), ineffective stock accounted for around 19% of all dwellings within the Aberdeenshire area of the Park, with second homes accounting for around 13% of all dwellings (see Figure 42). Since 2008 this level has varied slightly from year to year, with an annual average of around 15%.

Aberdeen City and Shire are currently in the process of producing a new HNDA, which they hope to submit to the Scottish Government in late 2016. The contents of this HNDA will be taken into account as it emerges.

Moray Area

Moray Council's HNDA (2011) uses the Scottish Government's definition of a functional housing market and concludes that the whole of Moray is a functional HMA, within which six sub or local HMAs exist. The HNDA identifies the area of the Cairngorms National Park that lies within its boundary as one of these local HMAs.

The HNDA notes that local opinion on housing issues within the Cairngorms National Park Local HMA is that:

- There are affordability issues associated with lower incomes, increased costs associated with rural living, and increased cost of rural housing development.
- There are very few employment opportunities, and public service cuts could accelerate depopulation.
- There are community concerns about housing development, in all tenures, meeting the needs of households not resident in CNP, and local households in need being disadvantaged.
- There are community concerns about the design of recently built affordable housing, and at the increasing number of empty properties/derelict buildings.

The HNDA only identified an estimated need of 2 new dwellings per year, 1 of which should be affordable. Therefore, over a 20 year period, from 2011 to 2021, this equates to a total of 40 new dwellings, half of which should be affordable. This equates to a Housing Supply target of 10 units over the Plan period. Between 2000 and 2015 the completion rate in Moray was an average of 3 units per year and so the level of development required to meet the target is considered achievable.

Table 22 Baseline net annual housing need for Cairngorms HMA (Moray Council, 2011)

Unsupported Housing				Supported Housing			Total
Self-contained general needs/ mainstream housing	Amenity/ medium dependency housing	Sheltered/ Very Sheltered/ Extra care housing	Sub-total	Supported housing for people with learning disabilities	Supported housing for women fleeing domestic abuse	Sub-total	
0	0	0	0.6	0	0	0.6	0.6

Table 23 Summary Calculation for Cairngorms HMA (Moray Council, 2011)

Net current demand	Number of years over which demand will be met	Annual current demand - backlog reduction	Annual newly arising demand (net)	Total annual demand	Total annual supply	Net annual housing demand
1	10	0	3	3	2	1

Concern is however generated over the proportionally high level of affordable housing identified by the HNDA in that a 50% requirement could lead to certain sites becoming unviable. It is considered that this could be addressed through the calculation of the housing land requirement, with an average annual supply of 3 dwellings being more appropriate, with 1 dwelling (representing 1/3 of the supply) to be delivered as an affordable unit. This would represent a housing land requirement of 15 dwellings over the plan period. This additional margin is greater than the 10% to 20% recommended by Scottish Planning Policy (2014), however when considering Cairngorms HMA's population, which was estimated to be around 785 in 2014, it is important to recognise the degree of error that can occur with a such a small sample. Therefore, in order to ensure that a generous supply of land for housing is provided, and that this land is viable, it is sensible to consider a greater level of generosity. This level of development remains within the historic completion rate for the area.

Moray Council are currently in the process of producing a new HNDA, which they hope to publish for consultation through Housing Strategy Group during June / July 2017 and submit to the Scottish Government for robust and creditable assessment in August 2017. The contents of this HNDA will be taken into account as it emerges.

Perth and Kinross Area

Perth and Kinross Council HNDA (2009) was prepared before the extension of the National Park boundary into Perthshire in October 2010. In their analysis of their operational HMAs, the part within the LA within the Cairngorms National Park boundary was identified within the Highland Perthshire HMA.

Since the publication of the 2009 HNDA, TAYplan have carried out a Joint HNDA that covers its area (TAYplan, 2013). The Joint HNDA covers the Highland Perthshire HMA, although the National Park area of the HMA technically falls outside of the TAYplan area. According to the Census, the HMA was home to an estimated 11,595 people in 2011, while the Perth and Kinross area of the National Park had an estimated 945 (about 8.2% of the NMA's population). The TayPlan Joint HNDA investigated six scenarios but considered that Scenario 3 (anticipated economic future) and Scenario 4 (better than anticipated economic future) represented the aspirations of the four councils within the TAYplan region and best reflected the stated visions from their Community Plans and Single Outcome Agreements (Table 24). Also of relevance is the level of affordable housing need identified, which according to the Joint HNDA accounts for just over 45% of the Total Requirement.

Table 24 Comparison of TAYplan Joint HNDA Scenarios for Highland Perthshire HMA – annual averages (TAYplan, 2013).

Growth Scenario	2012-2032				
	SR	BMR	PR	OO	TR
Scenario 3: Anticipated Economic Future	30	16	34	20	100
Scenario 4: Better than Anticipated Economic Future	30	16	38	16	100

HNDA guidance requires information to be gathered and analysed at a functional HMA level. The number of units within the boundary of the Park is sufficiently low to allow the CNPA to conclude that this part of Highland Perthshire is not a functional HMA in its own right. No firm conclusions relating to housing need within the Perthshire area of National Park can therefore be drawn solely from these HNDAs. Consequently, in this area the CNPA must take into account other available information to provide an indication of the area's needed land supply.

If the figures presented within Scenario 3 and 4 of TAYplan's Joint HNDA are disaggregated by the proportion of the HMA's population living within and outwith the National Park, an estimated annual housing need of 8.2 units is reached (Table 25). It is recognised that the number of units within the National Park is too low for it to be defined as a functional HMA and that this is a crude method of estimating housing need, however it does give a broad starting point for calculating the number of houses the CNPA needs to plan for.

Table 25 Disaggregate of HMA Scenarios for Highland Perthshire HMA Scenarios based on population of Datazone S01005147[13] - annual averages.

Growth Scenario	2012-2032				
	SR	BMR	PR	OO	TR
Scenario 3: Anticipated Economic Future	2.5	1.3	2.8	1.6	8.2
Scenario 4: Better than Anticipated Economic Future	2.5	1.3	3.1	1.3	8.2

This annual figure would represent a significant increase in the average annual completion rate, which for the period 2000-2015 stands at 2 units per year (Figure 45 and Table 26).

[13] This datazone roughly corresponds with the Perth and Kinross area of the National Park.

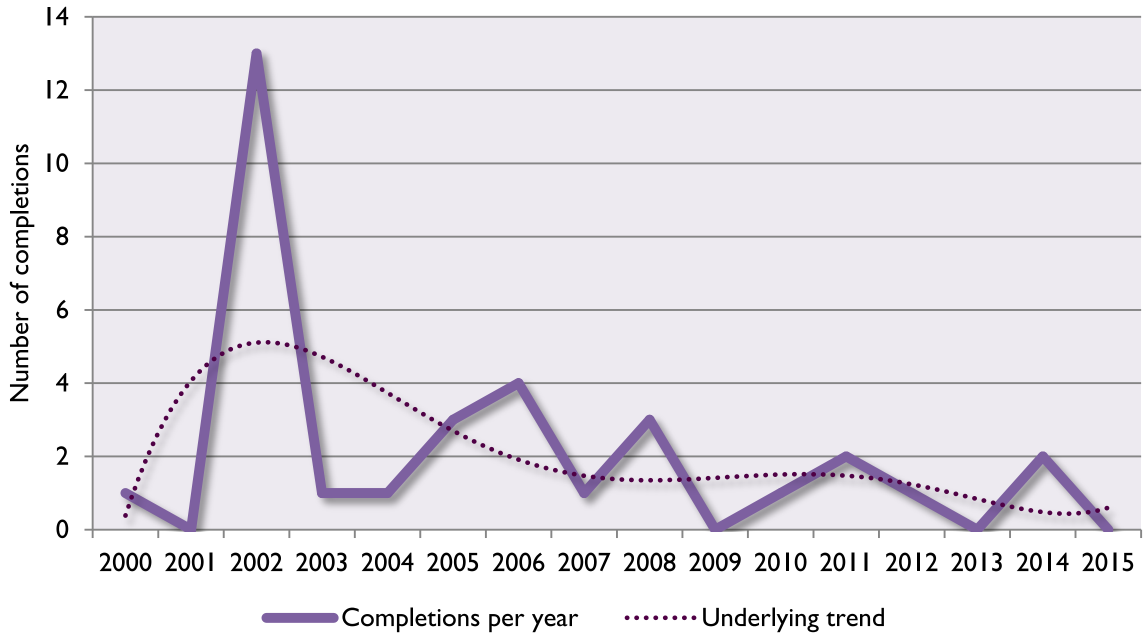


Figure 45 Annual completions in the Perth and Kinross area of the Cairngorms National Park. Source: Perth and Kinross Council.

Table 26 Completions by 5 year period in the Perth and Kinross area of the Cairngorms National Park. Source: Perth and Kinross Council.

	2000-2004	2005-2009	2010-2014	2015-	2000-2015
Number of completions	16	11	6	0	33
Annual average completions	3	2	1	0	2

As highlighted earlier in the paper, this method of disaggregating the HMA's need is problematic, since it is not the headline population that generates a policy response, but the rate and scale at which change occurs. We may therefore once again turn to National Records of Scotland's one-off research project to produce population and household projections for sub-council areas (National Records of Scotland, 2016). Due to its very small population the Perth and Kinross area of the National Park falls within a broader statistical area that covers much of rural Perthshire, including towns such as Pitlochry and Aberfeldy (Table 27 and Table 28).

Table 27 Projected population change for North Perthshire 1 sub-council area (NRS, 2016).

North Perthshire 1 Mid-year Estimate 2012	Datazone S01005147 Mid-year Estimate 2012	% of North Perthshire 1 2012 population in Datazone S01005147	North Perthshire 1 Projected Population 2026	North Perthshire 1 Projected Population Change
10,249	926	9.0%	10,831	5.7%

Table 28 Projected household change for North Perthshire 1 sub-council area (NRS, 2016).

Estimate Households 2012	Assumed Household Size 2012	Projected Households 2026	Assumed Household Size 2026	Projected Household Change
4,631	2.21	5,030	2.15	8.6%

The level of population growth projected for North Perthshire 1 is considerably higher than that experienced by the Perth and Kinross area of the National Park over recent years, with mid-year population estimates suggesting that between 2001 and 2014 the population of the area remained broadly stable with no statistically significant change over the period (an estimated net increase of 16 persons, or 1.7%) (Figure 46). There has also been year to year variability population growth and decline so it is difficult to tell what the long term trend for the area is likely to be.

The rate of growth in the number of households has also historically been lower, with numbers growing by around 4.6% between 2008 and 2014 (Figure 47). Over the same period average household sizes appear to have remained broadly level, remaining around 2.2 to 2.3 persons per household[14].

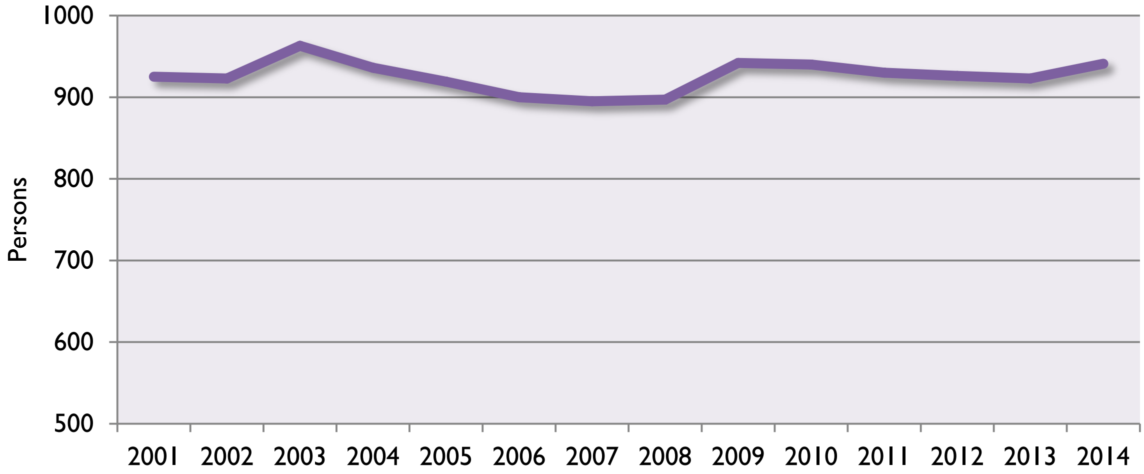


Figure 46 Mid-year estimates of the total population of the Perth and Kinross area of the Cairngorms National Park (Datazone S01005147) 2001-2014. Source: www.sns.gov.uk.

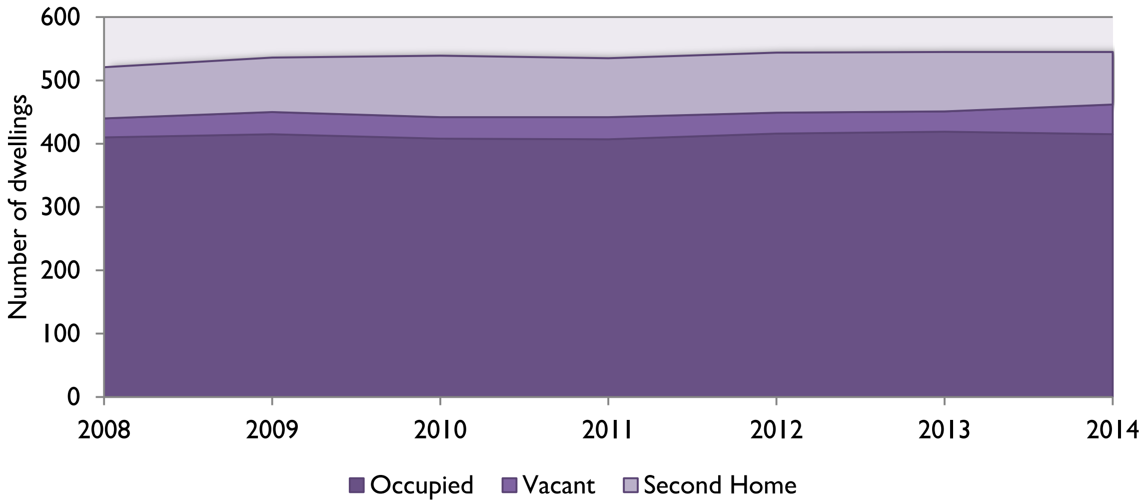


Figure 47 Changes in household occupation in the Perth and Kinross area of the Cairngorms National Park (Datazone S01005147) 2008-2014. Source: www.sns.gov.uk.

[14] Calculated as the ratio between mid-year population estimates (Figure 33) and annual estimates of occupied dwellings (Figure 34).

The overall growth in North Perthshire 1 is likely to be heavily influenced by population and household change within its largest settlement, namely Pitlochry, which lies outwith the National Park and whose population grew by around 10.7% between 2001 and 2014. Though less dramatic, Aberfeldy, which is also located outwith the National Park, also experienced a greater level of growth (around 3.7%) (Figure 48, Figure 49 and Figure 50). It should be noted that both of these settlements also fall within the Highland Perthshire HMA and therefore, assuming growth is projected reflect past trends, then they are going to require a higher proportion of the 100 dwellings per annum outlined in Table 24 than would be available should the split be based on a simple snapshot of the most recent Mid-Year population estimate, as outlined in Table 25.

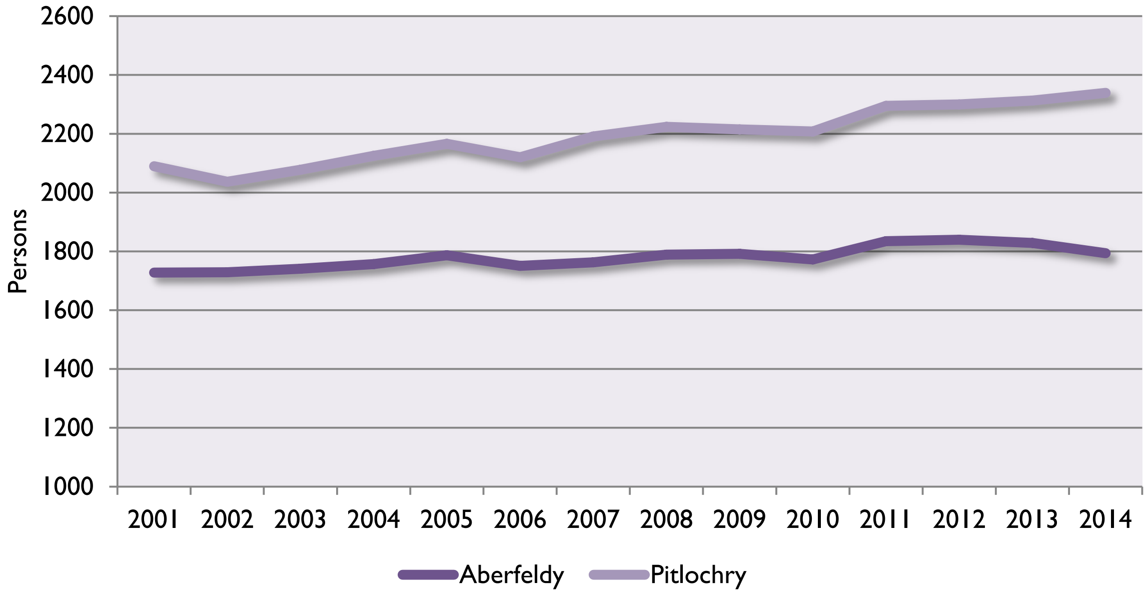


Figure 48 Mid-year estimates of the total population of Pitlochry and Aberfeldy, 2001-2014. Source: www.sns.gov.uk.

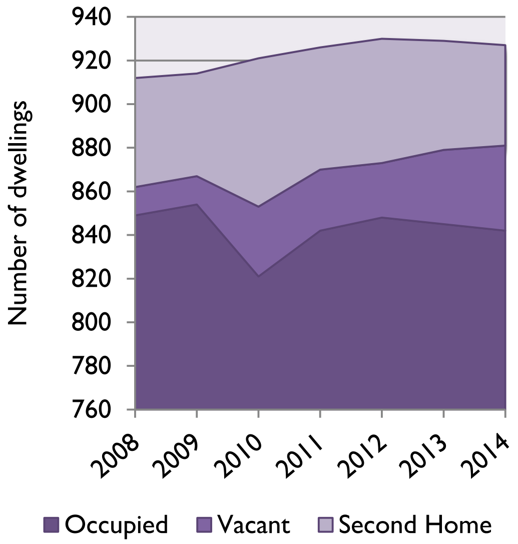


Figure 49 Changes in household occupation in Aberfeldy 2008-2014. Source: www.sns.gov.uk.

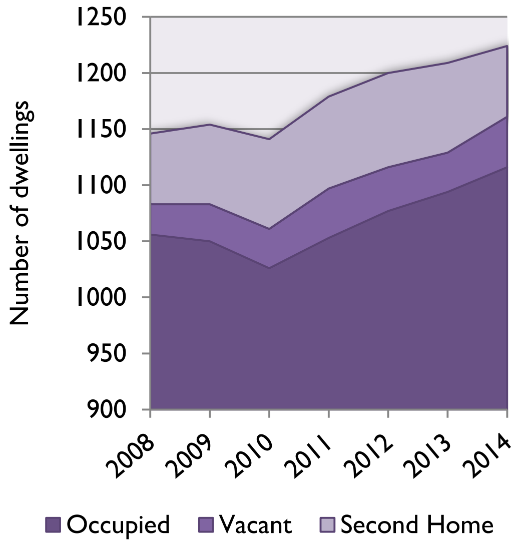


Figure 50 Changes in household occupation in Pitlochtry 2008-2014. Source: www.sns.gov.uk.

Source: www.sns.gov.uk.

Given what we know about the nature of population and household change in the North Perthshire area it is considered best to adopt a low growth scenario for housing provision in this part of the National Park. Taking account of the estimated population change in this area (Figure 46) and the overall principal population projection for the National Park itself (Figure 9), an assumed population increase of 1% between 2012 and 2037 is not unreasonable.

Under this scenario the projected fall in average household size is the greatest driver for household change. Working on the assumptions of NRS' principal projection, the average household size across the National Park is projected to fall from 2.15 in 2012 (the base date for NRS' projections) to 2.02 in 2025, which represents the likely end of the next LDP's lifespan, and 1.95 by 2037, which represents the end of the projection period. While calculations of household size based on mid-year estimates and indicate a higher average household size in 2014, it is considered best to use NRS' estimated and projected household size, since these are derived from a larger sample population and are therefore likely to be more robust. Furthermore, it is worth noting that it is not the headline figures that are important, but the rate and scale of change and this is provided by the NRS projections. Table 29 provides an outline of these calculations.

Table 29 Projected change in households in the Perth & Kinross area of the National Park when applying NRS' (2014) assumptions on average household sizes.

2012 Mid-year estimate	2012 Occupied dwellings	Projected population 2025	Projected population 2037	Projected households 2025	Additional households 2025	Average annual dwellings	Total 2020-2025
926	416	932	935	461.4	45.4	3.2	16

On the basis of these estimates we may also consider the scenarios for Housing need identified for the Highland Perthshire HMA by the TAYPlan Joint HNDA (2013). Again, it should be noted that this is a blunt means of assessing need and demand within the area and therefore further investigation is necessary.

Table 30 Application Table 18's estimates to TAYplan Joint HNDA Scenarios for Highland Perthshire HMA – Total Requirement for 5 year period.

Growth Scenario	5 year period				
	SR	BMR	PR	OO	TR
Scenario 3: Anticipated Economic Future	4.8	2.6	5.4	3.2	16
Scenario 4: Better than Anticipated Economic Future	4.8	2.6	6.1	2.6	16

The rate of development required to meet this level of need is also more closely aligned with historic completion rates, which over the fifteen year has been at around two dwellings per year (Table 26).

One means of testing whether or not the estimates in Table 29 and Table 30 are realistic is to compare them against the council house waiting list maintained by Perth & Kinross Council. This information is available on a HMA and settlement basis (Table 31). It should be noted that the information in Table 31 counts only those applicants with a need for rehousing and applicants are counted on the basis of their first area of choice only. This means that there is no double counting where applicants have listed a number of areas for rehousing. The data does identify a need for affordable housing within the National Park area ; furthermore it identifies the need to a large proportion of 2 bedroom units.

Table 31 Total CHR Applications by Apartment Size (Mainstream and Sheltered) in Highland Perthshire HMA at 31st March 2016. Source: Perth & Kinross Council.

Settlement	Applications by dwelling size (bedrooms)								Total CHR Lets 2015/16	Pressure Ratio
	1	2	3	4	5	6	7	Total		
Aberfeldy, Dull & Weem	0	39	14	8	3	0	0	64	20	3.2
Acharn	0	0	0	0	0	0	0	0	No Lets	No Lets
Ballinluig	0	5	3	0	0	0	0	8	1	8.0
Blair Atholl & Killiecrankie	0	12	3	0	0	0	0	15	3	5.0
Bobbin Mill Chalet Project	0	1	0	0	0	0	0	1	No Lets	No Lets
Dunkeld & Birnam	0	36	16	4	0	0	0	56	11	5.1
Fearnan	0	1	0	0	0	0	0	1	No Lets	No Lets
Glenlyon	0	1	0	0	0	0	0	1	1	1.0
Grandtully	0	1	0	0	0	0	0	1	No Lets	No Lets
Kenmore	0	1	3	0	0	0	0	4	1	4.0
Kinloch Rannoch	0	5	1	1	0	0	0	7	2	3.5
Logierait	0	0	1	0	0	0	0	1	1	1.0
Pitlochry	0	85	25	7	1	0	0	118	31	3.8

Settlement	Applications by dwelling size (bedrooms)								Total CHR Lets 2015/16	Pressure Ratio
	1	2	3	4	5	6	7	Total		
Total		187	66	20	4	0	0	277	187	3.9

Another factor that needs to be taken into account is the level of ineffective Stock within the area and in particular the level of second home ownership. According to the most recent estimates (2014), ineffective stock accounted for around 24% of all dwellings within the Perth & Kinross area of the Park, with second homes accounting for 15% of all dwellings (see Figure 47). Since 2008 this level has varied slightly from year to year, with an annual average of around 17%.

Angus Area

Angus Council HNDA (2010) places the area of Angus within the Cairngorms National Park within the West Angus and Strathmore & Glens HMAs. The HMAs includes the settlements of Forfar, Kirriemuir and Letham and stretches north to include the Angus Glens (Glen Esk, Glen Clova, Glen Prosen and Glen Isla). There are only 33 dwellings (Figure 51) in the Angus area of the National Park, which led the Council's housing market analysis to conclude that purchasers from the Cairngorms National Park have no influence on the operation of any HMA in Angus, and therefore excluded this area from consideration in the assessment of housing need and demand.

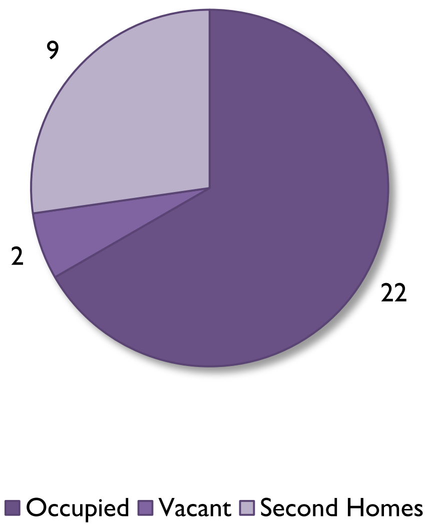


Figure 51 Occupancy of dwellings within the Angus part of the Cairngorms National Park September 2016 (source: Angus Council).

Since the publication of the 2010 HNDA, TAYplan have carried out a Joint HNDA that covers its area (TAYplan, 2013). The Joint HNDA covers the West Angus and Strathmore & Glens HMAs, although the National Park area of the HMAs technically falls outside of the TAYplan area. The Joint HNDA does not draw any conclusions about the National Park.

No conclusions relating to the National Park can be drawn from these HNDAs, therefore in this area the CNPA must take into account any other information available to provide the needed land supply. Given the extremely small size of the population and the number of households within the area however, it is clear that a quantitative analysis of need is not possible. Given the area's relative geographical isolation to the rest of the National Park, it is also clear that this population is unlikely to generate any demonstrable need that needs to be met at a strategic level; indeed the area has seen only two new dwellings completed since 2000 (see Table 7). Therefore, a policy based approach to housing provision is thought to be the most robust option within the area, with no overall level of housing set and applications considered on a case by case basis. Under such circumstances the onus would be on the applicant to demonstrate need, just as would be the case in any other out of settlement locations within the National Park.

Specialist Provision

Gypsy / Travellers

The term 'Gypsy / Travellers' refers to distinct groups – such as Roma, Romany Gypsies, Scottish and Irish Travellers – who consider the travelling lifestyle part of their ethnic identity.

According to the 2011 census there were 113 Gypsy / Travellers living in the Cairngorms National Park. Of these just over 75% were in Badenoch and Strathspey (Figure 52). While the Census is the most comprehensive source of demographic information on Gypsy / Travellers, there are certain caveats that need to be underlined when using it to estimate the Gypsy / Traveller population. For example, the transient roadside population is unlikely to be picked up while those who are resident on a full time basis in the National Park may be reluctant to self-identify as Gypsy / Travellers due to fears around issues of discrimination and harassment. Furthermore, the historical twice yearly count of Gypsy / Travellers indicates that the population on Council run sites and encampments has typically been 30-40% lower in the winter; the census was carried out on the 27th March, which is before the travelling season begins in April. The Census is therefore likely to be an underestimate of the population present within the National Park, particularly during the summer months.

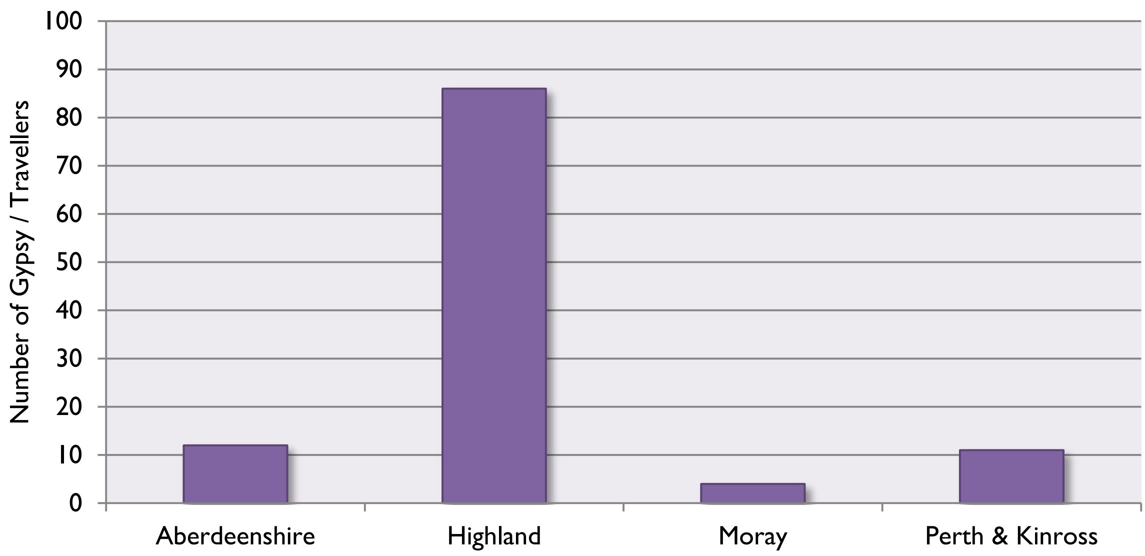


Figure 52 Gypsy / Travellers in the Cairngorms National Park by Local Authority area according to the 2011(Source: Census table KS201SC).

In 2014 Craigforth consultants published a study on the accommodation needs of Gypsy / Travellers in the Highland Council area. The study estimated the area's Gypsy / Traveller population using a combination of census data and fieldwork data and management records to make allowances for the encamped population during the study period. These estimates assumed that the census figures for highland primarily represented the more settled Gypsy / Traveller population and include only a small proportion of the encampment population.

Specifically, the study assumed that 90% of the encampment population recording during this study period is additional to Census figures.

The National Park has one permanent Gypsy / Traveller site, which is located in Newtonmore and run by the Highland Council. The site was originally established as seasonal provision but moved to permanent year-round provision from late 2011. It has 7 pitches, each of which has a dedicated amenity block which are located in a central block alongside the site office.

According to the Highland Council there has not been a high demand for pitches and normally only 4 are taken up at any one time. The pitches have been primarily occupied by members of the same extended family. Other pitches are typically occupied on a shorter-term basis by families traveling in the area, with a turnover rate of about 50-60% for the site as a whole (Table 32). Occupation is usually in the summer months with pitches left unoccupied during the winter. In 2014 rent on the site was £62 / £63 per week, which is lower than the Highland average of £72.

Table 32 Turnover of Newtonmore Site (Source: Criagforth, 2014).

Total Site Capacity	**Occupied at time of study**	**Vacancies Arising**			**Lets made**			**Avg Annual Voids**	**Avg Annual Lets**
		13/14	**12/13**	**11/12**	**13/14**	**12/13**	**11/12**		
7	6 (86%)	3	1	8	1	0	8	4 (57%)	3 (43%)

Craigforth (2014) surveyed occupants of the site on the quality of its provision. Dissatisfaction was raised with the distance of pitches to chalet blocks, the condition of chalets with significant mould / damp problems and that the chalets were not suitable for year round use and the condition of pitch surfaces. A lack of pitches was not however identified and at the time of survey there were no households waiting to be accommodated on the site. Residents felt that top investment priorities for the site should be the installation of a dedicated amenity block at each pitch, the installation of road warning signs and / or extension of the 30 mph zone, the replacement of the play park and the installation of lockable fences / gates to individual pitches.

According to the Highland Council instances of unauthorised encampments over the last five years in Badenoch and Strathspey have been low, with only 20 reported incidents over this period. Encampments usually occurred on the same spots with sites at Kingussie, Grantown-on-Spey and Dava being the most frequented.

Craigforth (2014) estimated that there was a need to accommodate 50 - 65 Gypsy / Traveller households in the Highland Area over the period of 2014-2019. They concluded however that the need for provision in Badenoch and Strathspey would remain broadly similar to historic levels and that there was capacity within the 7 pitches of Newtonmore to meet this. There is therefore no need to provide additional land within Badenoch and

Strathspey at this time and the Highland HNDA does not identify any further need for land in future time periods.

In other parts of the National Park the estimated number of Gypsey / Travellers is much lower and identifying need at a local area more difficult.

Aberdeenshire Council has a Gypsy / Traveller Site Provision Strategy, published in 2015. For the purpose of this Strategy the area of Aberdeenshire in the Cairngorms National Park is included within the broader Marr area. According to the Strategy, the area has seen very low rates of unauthorised encampment, with only 7 reported between 2009 and 2013.

The Strategy aims to provide additional sites across Aberdeenshire to help meet the increasing demand for accommodation within the local authority's area. In addition to the existing provision the objective is to identify at least one area of land in each of the Strategy's areas, including Marr. While no new sites have been provided as yet within the Marr area, the forthcoming Aberdeenshire LDP, which is due to be adopted in 2017, contains allocations for sites in the Formartine, Garioch and Kincardine and Mearns areas. Furthemore, the LDP contains a permissive policy towards dealing with windfall sites.

The nearest Council run site to the Perth and Kinross part of the National Park is at Bobbin Mill, which is a short distance away from Pitlochry town centre in a private woodland area. Bobbin Mill has been in existence since 1947 and was set up as a Gypsy / Traveller housing project by the Scottish Office (Department of Health) and the Church of Scotland. The land was leased to the then County Council for a term of 99 years by Cluniemore Estates (now Pitlochry Estates). At that time the provision consisted of a former Army Training Cadet hut, which was converted to provide 4 one bedroomed apartments with a cold water supply, a fire and sink and toilet facilities.

In September 2010, six three bedroomed chalet accommodation was provided for the residents. This was undertaken in conjunction with Pitlochry Estates and funding was accessed from the Scottish Government. The same family has lived on this site for many years which is very settled and fits well into the community structure. Any housing management issues are covered by the local Area Housing Office just a short distance away.

Perth & Kinross Council has undertaken research projects (in 2003, 2007 and 2011) with input from the Gypsy / Traveller communities to help define their accommodation needs. The research has highlighted a lack of quality, and lack of access and provision of, private sites plus the loss of some private sites to Gypsies / Travellers as landowners moved toward higher density migrant worker encampments or holiday accommodation. It evidenced a lack of sites and facilities for seasonal travelling and temporary encampments in a range of locations across Perth and Kinross.

The 2011 Census estimates a population of 4 Gypsy / Travellers in the Moray area of the National Park. Even if this is assumed to be an underestimate, which it is likely to be, it is unlikely that there is a statistically significant population within this part of the National Park.

Owing to the area's peripheral geography it is also unlikely that the area receives a large transient roadside population.

Given that the low numbers of Gypsy / Travellers estimated by the 2011 Census to be living in the Aberdeenshire, Perth and Kinross and Moray areas of the National Park and the ambitions of Aberdeenshire and Perth and Kinross Council to provide additional sites, there is no evidence to suggest that a site, either permanent or temporary, needs to be provided within these areas. In Badenoch and Strathspey the Council site in Newtonmore is able to accommodate the current and projected number of Gypsy / Travellers households in the that area of the National Park. In conclusion it is considered that a policy approach would therefore best serve any need that arises over the Plan period.

Summary

The Cairngorms National Park is only covered by two HMAs that may be regarded as contiguous with its boundary, namely Badenoch and Strathspey HMA in Highland and Cairngorms Local HMA in Moray. Two other HMAs, namely Aberdeenshire's Rural HMA and TAYplan's Highland HMA include areas of the National Park, but as functional areas are mostly located outwith the National Park's boundary. Finally, while the area of Angus Council within the National Park is included in TAYplan's West Angus and Strathmore & Glens HMAs, it excluded from any part of the analysis of housing need and demand in that area. It should be noted that despite no housing need being identified in the Angus area of the National Park, this does not itself preclude future development from occurring. Instead proposals would need to be considered on a case by case basis and determined in accordance with the policies of the Local Development Plan.

On the basis of the information currently available to the CNPA and discussed in this paper, **Table 33** provides a series of initial options for the LDP's housing supply targets and land requirements 2020-2024.

Table 33 Initial options for LDP 2's Housing Supply Targets and Land Requirements 2020-2024

Local Authority Area	Affordable (SR + BMR)	Market (PR + OO)	Total Requirement
Aberdeenshire	26	51	77
Angus	0	0	0
Highland – Principal Growth Scenario	161	140	301
Highland – High Growth Scenario	191	178	369
Moray	5	10	15
Perth and Kinross	7	9	16
Cairngorms National Park Total – Principal Growth Scenario	199	210	409
Cairngorms National Park Total – Principal Growth Scenario + 10% generous supply margin	**219**	**231**	**450**
Cairngorms National Park Total – High Growth Scenario	212	216	428
Cairngorms National Park Total – High Growth Scenario + 10% generous supply margin	**233**	**238**	**471**

4.6 Current Housing Land Supply and Delivery

SPP (2014) states that Local Development Plans (LDP) should "…allocate a range of sites which are effective or expected to become effective in the plan period to meet the housing land requirement in full. They should provide a minimum of 5 years effective land supply at all times".

Table 34 sets out the estimated housing land supply effective 1st January 2017. The CNPA has no statutory duty to produce Housing Land Audits (HLAs), however this estimate follows the same methodology carried out by the Highland Council in their most recent HLA and draws on information from the HLAs completed by the relevant local authorities. The table identifies and provides a programme of expected housing delivery over the initial and following 5 year periods and includes expectations for the delivery of new homes up to 2030 and beyond.

Sites included in the estimate are housing sites under construction, sites with planning consent and sites in the adopted Local Development Plan where such a site will provide 4 or more housing units.

It is significant to note that a number of the existing housing sites are relatively large (e.g. site allocations H1 in Ballater [250 houses], EP1 in Aviemore [140 houses], EP2&3 in Aviemore [93 houses], EP1 in Kingussie [300 houses], H1 in Newtonmore [120 houses], and the proposed new settlement at An Camas Mor [1,500 houses]). These large strategic sites can provide long-term certainty and are expected to meet the bulk of the National Park's housing needs. However, as it takes time to put in place the necessary infrastructure and delivery arrangements for such sites they can take time to start or be affected by changes in the housing market.

The delivery of these sites will need to be monitored by the CNPA and should any issues with the current land supply be identified, then other policy and site options may need to be sought. The framework for this monitoring is set out within the Local Development Plan's Action Programme, which is updated on an annual basis. In summary, The Action Programme sets out how the CNPA, constituent local authorities and other partners intend to implement the LDP, setting out where possible:

- A list of actions required to deliver each of the Plan's key policies and proposals;
- The organisation who is to carry out the action; and
- The broad timescale for carrying out each action.

Table 34 Estimated land supply as of January 1st 2017

Site	Settlement	Total Capacity	Remaining Capacity	Programming			
				2017 to 19	2020 to 24	2025 to 29	2030+
Highland							
EP: An Camas Mòr	Aviemore	1,500	1,500	73	150	150	1127
EP1: Horsefield, Aviemore Highland Resort	Aviemore	140	113	10	103	0	0
EP2/EP3: Dalfaber	Aviemore	93	93	16	35	30	12
Land to north of Aviemore Highland Resort (05/304/CP)	Aviemore	21	15	0	15	0	0
Sluggan Drive (07/0059/FULBS)	Aviemore	35	9	9	0	0	0
Inverdruie Sawmill (02/2130/FUL)	Aviemore	6	6	6	0	0	0
EP1: West of Boat of Garten	Boat of Garten	32	12	12	0	0	0
H1: Carr Road	Carr-Bridge	72	72	20	52	0	0
H2: Crannich Park	Carr-Bridge	22	22	22	0	0	0
EP1: Auchroisk Park	Cromdale	22	20	6	10	4	0
H1: Kirk Road	Cromdale	20	20	0	0	6	14
H1: Opposite Community Hall	Dalwhinnie	6	6	0	0	0	0
H2 Land by Garage	Dalwhinnie	6	6	0	6	0	0
EP1: Site at Ben Alder Road	Dalwhinnie	5	5	0	5	0	0
H1: West of Play Area	Dulnain Bridge	30	30	0	5	25	0
EP1: Adjacent to A938	Dulnain Bridge	10	10	0	10	0	0
H1: Beachen Court	Grantown-on-Spey	53	53	15	38	0	0

Site	Settlement	Total Capacity	Remaining Capacity	Programming			
				2017 to 19	2020 to 24	2025 to 29	2030+
H2: Castle Road	Grantown-on-Spey	20	20	5	15	0	0
EP1: Strathspey Hotel	Grantown-on-Spey	11	11	0	11	0	0
H1: Opposite School	Kincraig	40	40	4	15	15	6
EP1: Land between Ardbroilach Road and Craig an Darach	Kingussie	300	300	10	50	50	190
EP2: St Vincents Terrace	Kingussie	4	4	0	4	0	0
H1: Craigmore Road	Nethy Bridge	15	15	0	0	0	0
H1: Land between Perth Road and Station Road	Newtonmore	120	120	20	43	38	19
Aberdeenshire							
H1 Monaltrie Park	Ballater	250	250	10	100	100	40
H1 Chapel Brae	Braemar	6	6	3	3	0	0
EP2/3 St Andrews Terrace and Kindrochit Court	Braemar	41	41	20	21	0	0
EP4 Invercauld Farm	Braemar	13	4	0	4	0	0
H1: Land to the West and H2: Land to the East	Dinnet	19	19	5	14	0	0
Moray							
H1: Land to North East	Tomintoul	8	8	0	8	0	0
H2: Lecht Drive	Tomintoul	8	8	0	0	8	0
EP2: 57 Main Street	Tomintoul	8	8	4	4	0	0
Perth & Kinross							
EP1: Railway Yard	Killiecrankie	6	6	0	6	0	0

Site	Settlement	Total Capacity	Remaining Capacity	Programming			
				2017 to 19	2020 to 24	2025 to 29	2030+
Cairngorms National Park Total		**2,942**	**2,852**	**270**	**727**	**426**	**1408**

5. SUMMARY – KEY ISSUES / IMPLICATIONS FOR THE LOCAL DEVELOPMENT PLAN

Identifying housing need and demand

Updated Housing Need and Demands Assessments have been undertaken by the relevant local authorities within the National Park. The new Local Development Plan will need to take account of this information, along with the range of other evidence presented in section 3.5 of this report, in order to establish new housing supply targets and housing land requirements for the plan period. Initial options for the new Local Development Plan's housing supply targets and land requirements are outlined in Table 33.

Existing housing land supply

The current Local Development Plan identifies a large number of existing housing sites, many of which have not yet been built. These sites can be expected to make a significant contribution towards meeting housing land requirements over the next plan period. The new Local Development Plan will need to take account of this large existing housing land supply.

It is, however, also significant to note that a number of the existing housing sites are relatively large (e.g. site allocations H1 in Ballater [250 houses], EP1 in Aviemore [140 houses], EP2&3 in Aviemore [93 houses], EP1 in Kingussie [300 houses], H1 in Newtonmore [120 houses], and the proposed new settlement at An Camas Mor [1,500 houses]). The new Local Development Plan will need to consider the deliverability of these sites – particularly in the short term. It may need to examine the case for increasing flexibility in the housing supply by identifying a limited number of smaller sites to help support housing delivery in the short term.

Affordability of housing

The National Park experiences unique pressures in relation to the affordability of housing. These result from a combination of factors including high house prices relative to local wages, a high proportion of 'ineffective' housing stock (consisting largely of second and holiday homes), and a lower than average proportion of smaller sized properties within the Park. The new Local Development Plan will therefore need to ensure that more of the new housing that is built within the plan period is better targeted at meeting local needs. This could be achieved through a range of methods, including considering the case for higher affordable housing contributions in areas of most acute need, and seeking to influence the nature of new open market housing to secure a greater mix of house types and sizes (including more small homes).

6. REFERENCES AND FURTHER INFORMATION

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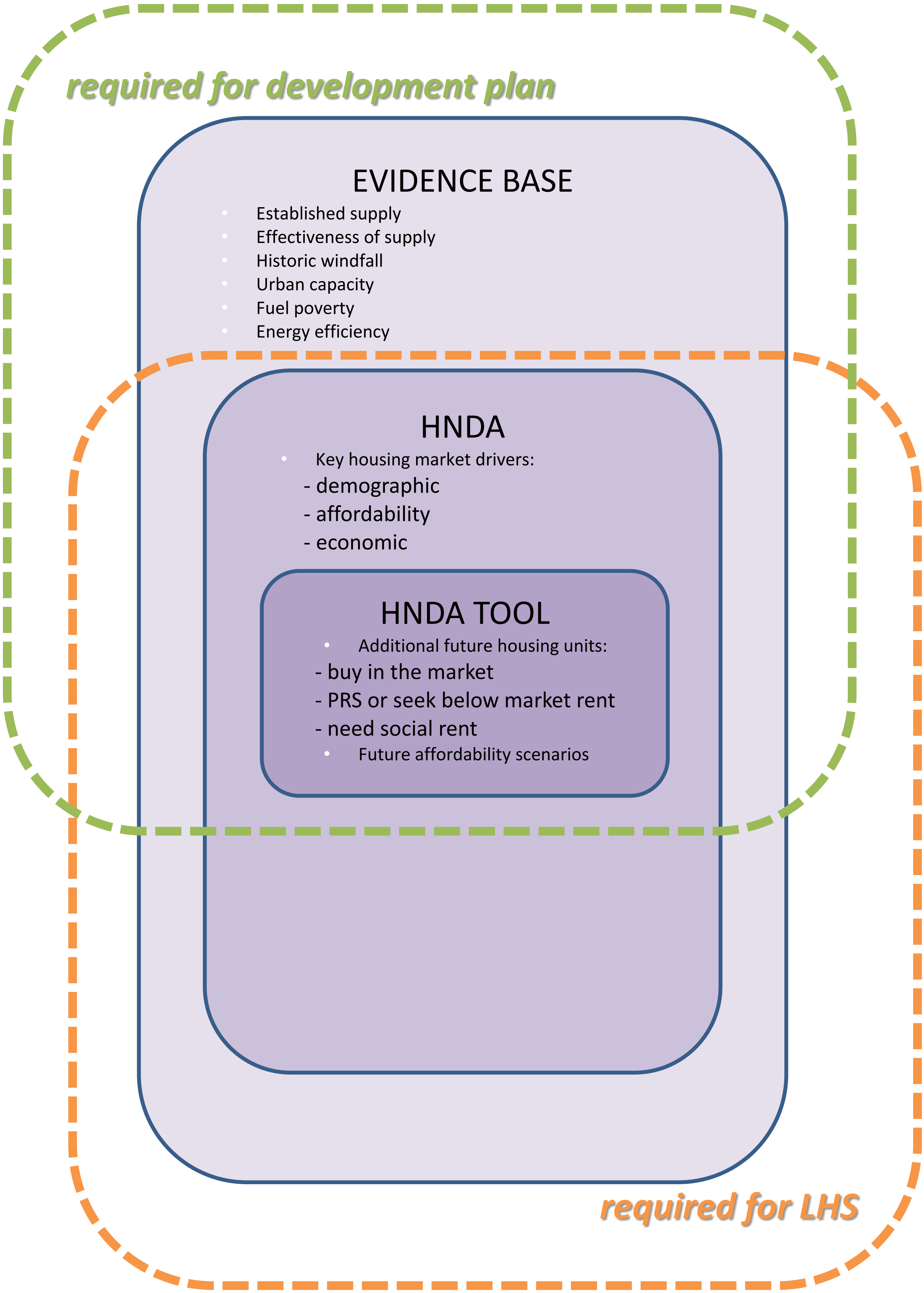
APPENDIX I: Housing Need and Demand Assessment Diagram



APPENDIX 2: Boundaries and statistical areas used in the analysis of the Cairngorms National Park

The population and demographic information contained within this publication is mostly based on data zones aggregated to a larger geographical area, which roughly corresponds with the area of the Cairngorms National Park.

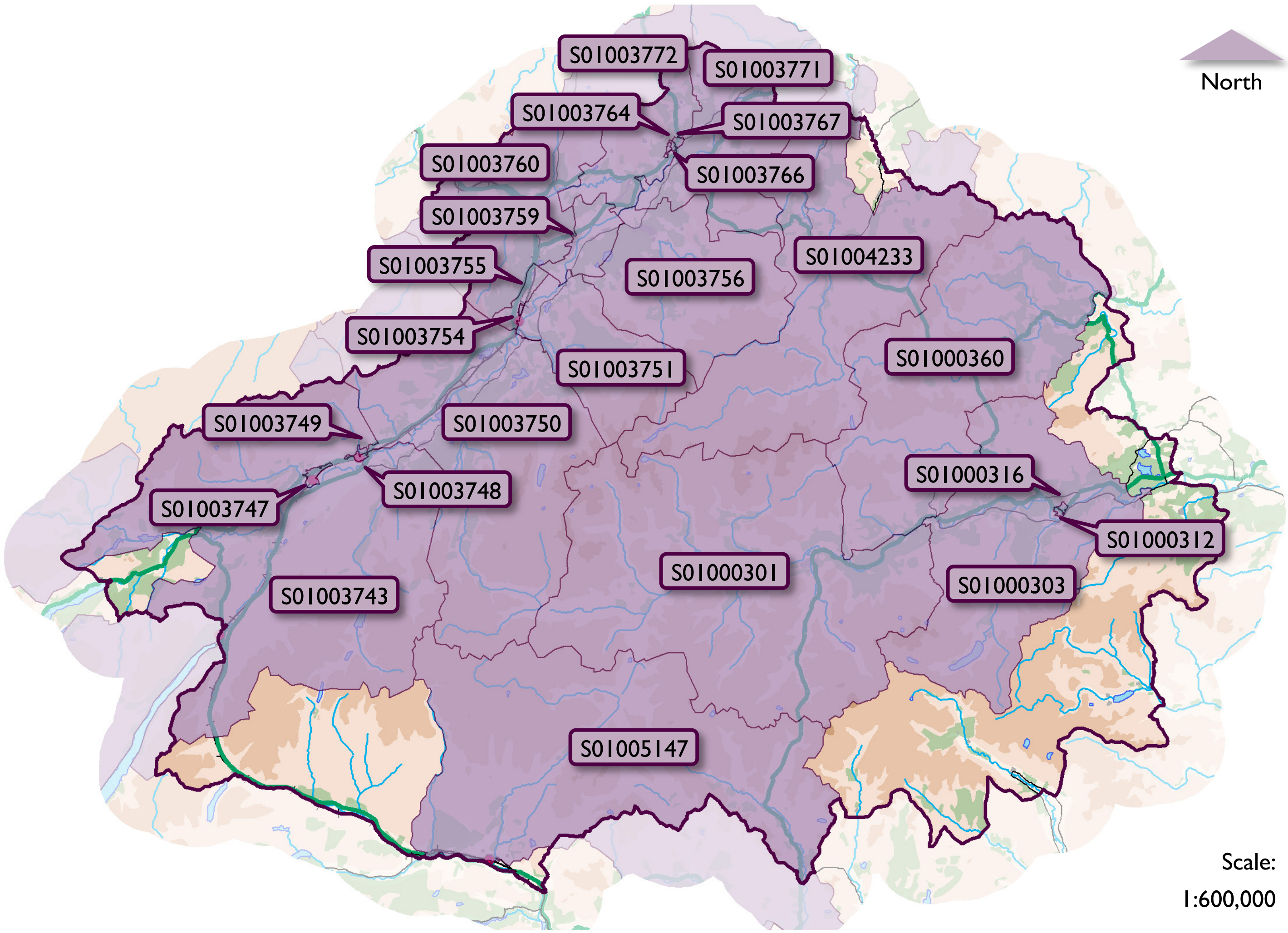
Data zones are the standard small area geography used by the Scottish Government (SG). In general they have populations of between 500 and 1,000 residents. Data zone boundaries do not exactly match the National Park boundary and so, for the purpose of statistical analysis, data zones are included or excluded based on the 'population weighted centroid'. This is a standard procedure for assigning the population of a small geography to a large geography if the former does not wholly fit within the boundaries of the latter or lies across the border of two large geographies. This is the methodology used in National Records of Scotland's (NRS) population projections for National Parks and Strategic Development Plan Areas (National Records of Scotland, 2014), and so for the sake of transparency and consistency, the same approach has been applied to all relevant data-sets within this document.

The population weighted centroid is essentially the point in the area where population density is the same all around the point, or put more simply, the population 'centre of gravity' of the area. A data zone has been allocated to the National Park area if the population weighted centroid lies within it.

It should be noted that in estimating the population of the National Park and calculating its projected growth, NRS does not include data zone S01005147 / S01011981, which is in Perth and Kinross. Population estimates presented in NRS documents therefore differ from those of the CNPA, since the CNPA does include the data zone within its analyses of the National Park's demographic and socio-economic character.

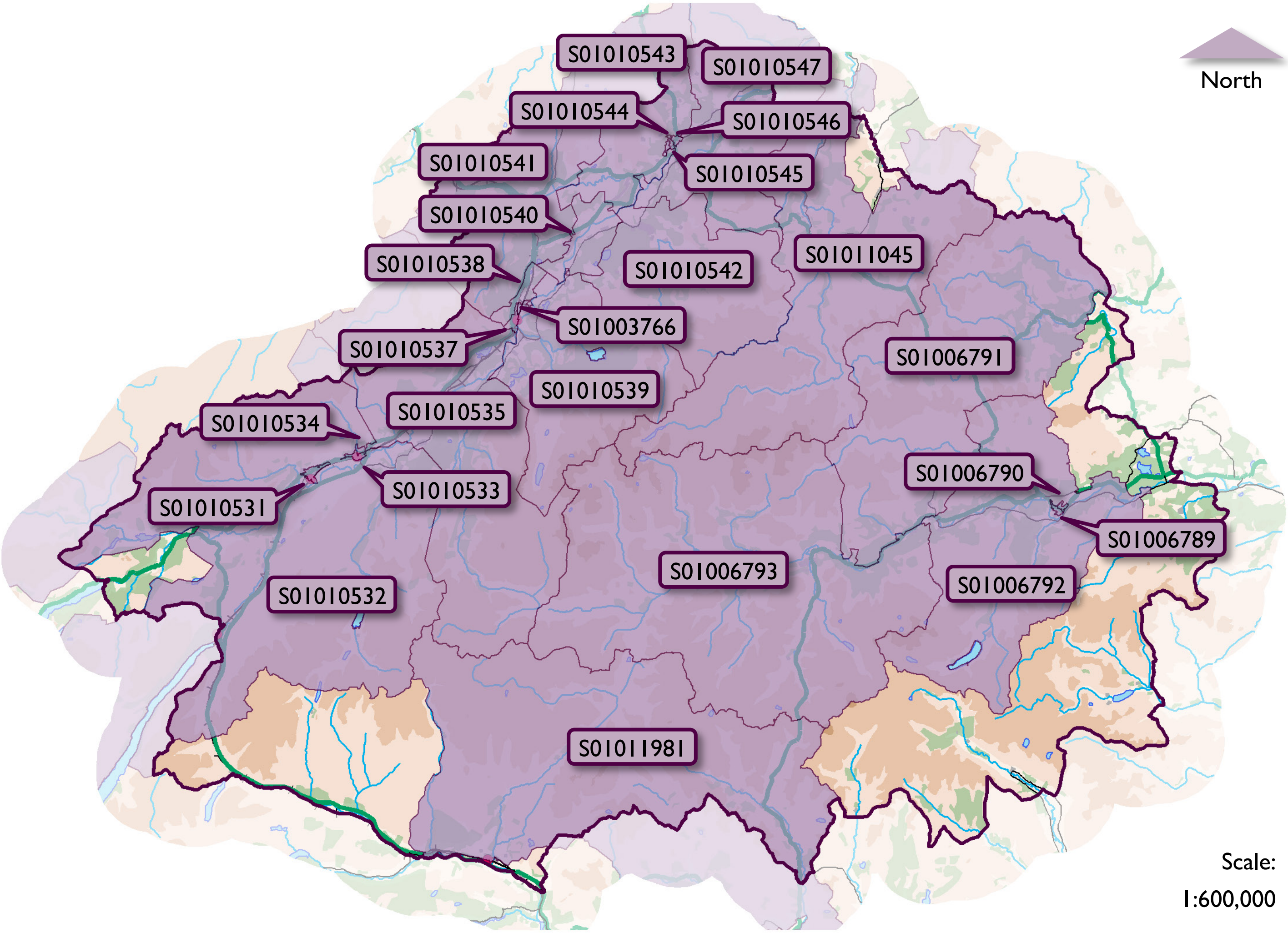
This difference does not however result in a significant problem when considering NRS' population projections, since it is not the headline population that generates a policy response, but the rate and scale at which change occurs. Since data zone S01005147 / S01011981's population was only estimated to be 941 in 2014 and the fact that it saw no statistically significant change over the period of 2001-2014 (an estimated net increase of 16 persons), there is little to suggest that its absence within NRS' calculations would have had a significant impact on the robustness of their projections.

It should be noted that the Scottish Government published revised 2011 Data Zones on 6 November 2014 and that these geographies replace the original 2001 boundaries used in the NRS population projections (National Records of Scotland, 2014). At a National Park level the changes are very minor with the 2011 data zone boundaries corresponding closely with those of the 2001 ones. This however means that within this document both 2001 and 2011 data zones are used, as at the time of writing large amounts of data was not yet available in for the revised data zones. Based on this methodology, the following data zones shown in Figure 53 and Figure 54have been chosen to represent the National Park.



2001 Scottish Data Zones		
	Aberdeenshire	S01000301
		S01000303
		S01000312
		S01000316
		S01000360
	Highland	S01003743
		S01003747
		S01003748
		S01003749
		S01003750
		S01003751
		S01003754
		S01003755
		S01003756
		S01003759
		S01003760
		S01003764
		S01003766
		S01003767
		S01003771
		S01003772
	Moray	S01004233
	PKC	S01005147

Figure 53 2001 Scottish Data Zones.



2011 Scottish Data Zones	Council area	Data zone
	Aberdeenshire	S01006789
		S01006790
		S01006791
		S01006792
		S01006793
	Highland	S01010531
		S01010532
		S01010533
		S01010534
		S01010535
		S01010536
		S01010537
		S01010538
		S01010539
		S01010540
		S01010541
		S01010542
		S01010543
		S01010544
		S01010545
		S01010546
		S01010547
	Moray	S01011045
	PKC	S01011981

Figure 54 2011 Scottish Data Zones.

The differences between the 2014 population projections and the previous 2012-based projections for the Cairngorms National Park are summarised in Figure 55 and Table 31 which compare the populations under the two projections at selected years (2014, 2019, 2024, 2029, 2034 and 2037).

The 2012-based National Population Projections showed the Cairngorms National Park population to be 17,570 by 2014 compared with the higher 2014 mid-year population estimate of 19,010, the base year of the 2014-based projections described in this report.

The 2012-based projections showed The Cairngorms National Park's population to be 17,660 by 2037 compared with the 2014-based projections that show the population to be 18,430 by 2037, a difference of 4.4%.

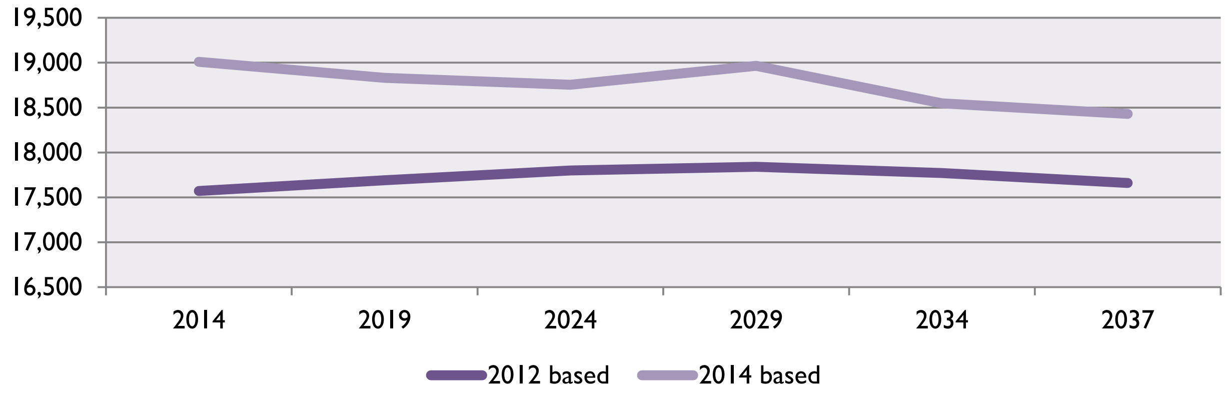


Figure 55 and Table 35 Comparison between 2012 and 2014-based population projections, principle migration scenario, for the Cairngorms National Park, selected years.

Projection Year	2012 based projections	2014 based projections	Difference	
			Number	%
2014	17,570	19,010	1,440	8.2%
2019	17,690	18,832	1,142	4.4%
2024	17,800	18,755	955	5.4%
2029	17,840	18,965	1,125	6.3%
2034	17,770	18,548	778	4.4%
2037	17,660	18,430	770	4.4%

There are a number of reasons for these differences namely:

- The two sets of projections have different base populations.
- The geography used as an aggregate for the National Park is more accurate in the 2014-based projections.
- Different migration and fertility assumptions - in the intervening two years, net migration decreased slightly before increasing, and the birth and death rates decreased slightly.
- The 2014-based projections are produced using a different method.
- The 2012 mid-year estimate, which was the base population for the 2012-based projection, has since been corrected for errors. These errors mainly affected age distribution and had a small effect on total population estimates for administrative areas.

These differences also highlight that projections become more uncertain the further ahead you go, and illustrate that it is worth producing new projections on a regular basis. When looking at the comparisons between the projections it is important to bear in mind the uses and limitation of projections.

For more information on the 2014-based projection methodology, see:

https://www.nrscotland.gov.uk/files//statistics/population-projections/snpp-2014/pop-proj-scot-areas-14-methodology.pdf

For more information on the uses and limitations of population projections in general, see:

https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-projections/uses-and-limitations-of-population-projections