Cairngorms National Park Partnership Plan 2017 – 2022

ISSUES REPORT

June 2016

HOUSING STRATEGY ISSUES REPORT

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.

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 2** for details of process).

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 may therefore play a leading role in setting the strategic context for the delivery of housing across the National Park.

The SPP also states (para 121) that while the LDPs of National Parks should aim to meet the housing land requirement in full in their area, 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 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

1.4 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. 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. TRENDS AND DATA

3.1 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.

3.2 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 1** (p. 38).

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 1**), 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.

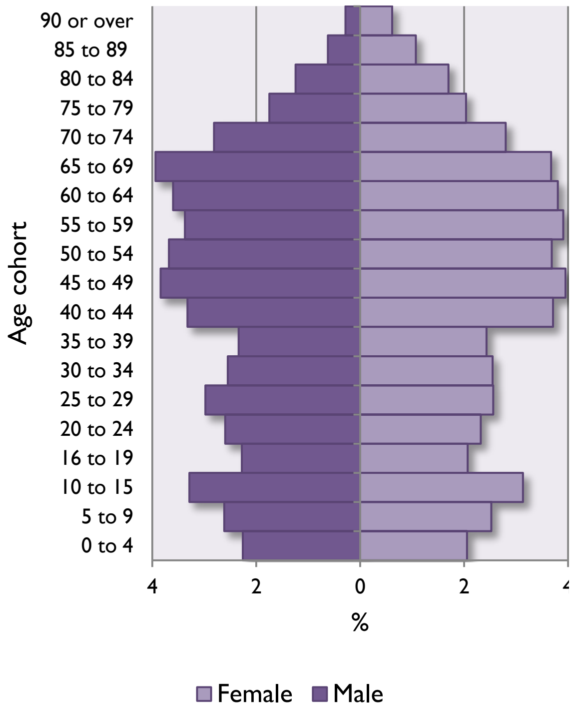

Figure 1 Estimated population profile by age and sex in the Cairngorms National Park in 2014.

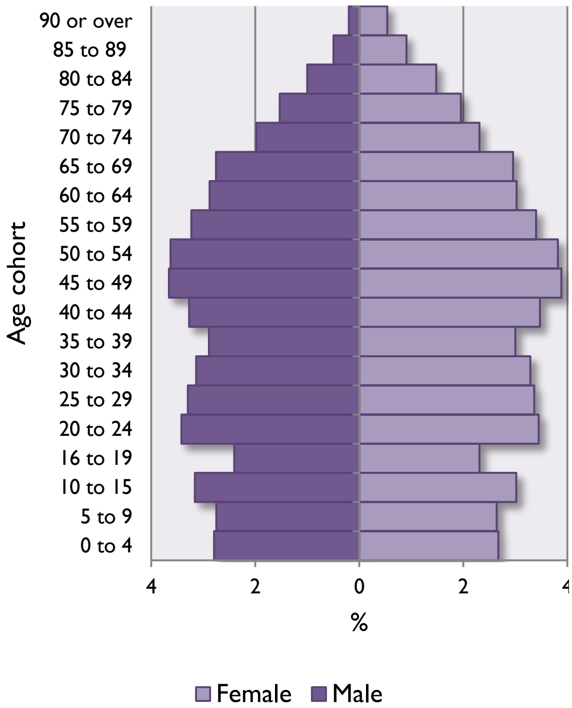

Figure 2 Estimated population profile by age and sex in Scotland in 2014.

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 3**). 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 4** and **Figure 5**). Indeed, the overall population in data zones within Aberdeenshire and Perth and Kinross has remained relatively stable.

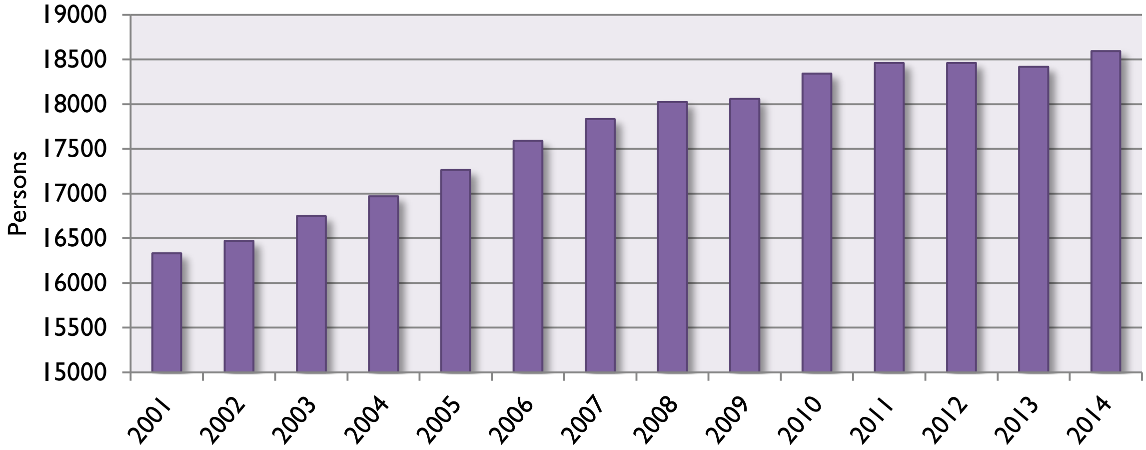

Figure 3 Mid-year estimates of total population for the Cairngorms National Park. Source: www.sns.gov.uk

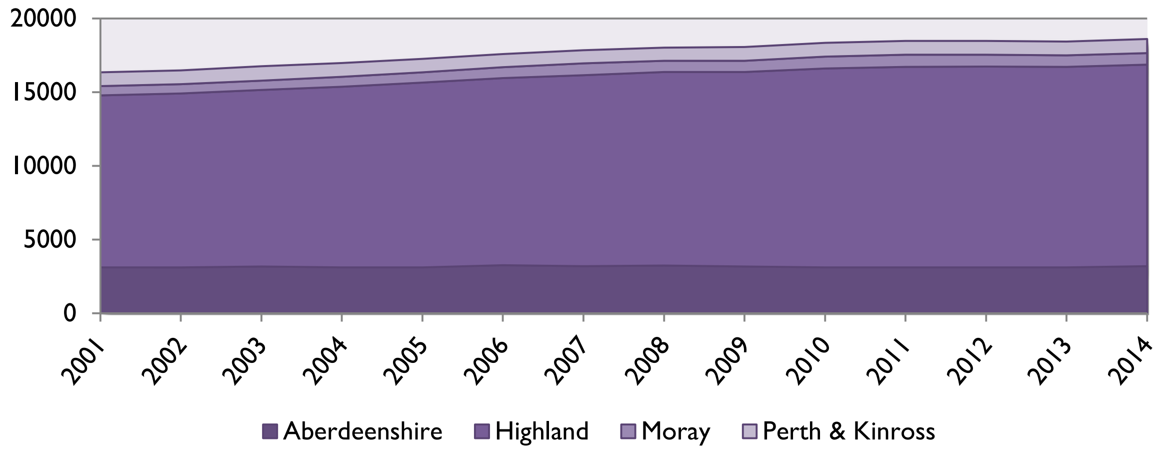

Figure 4 Mid-year estimates of total population for the Cairngorms National Park distributed by Local Authority Area. Source: www.sns.gov.uk

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.

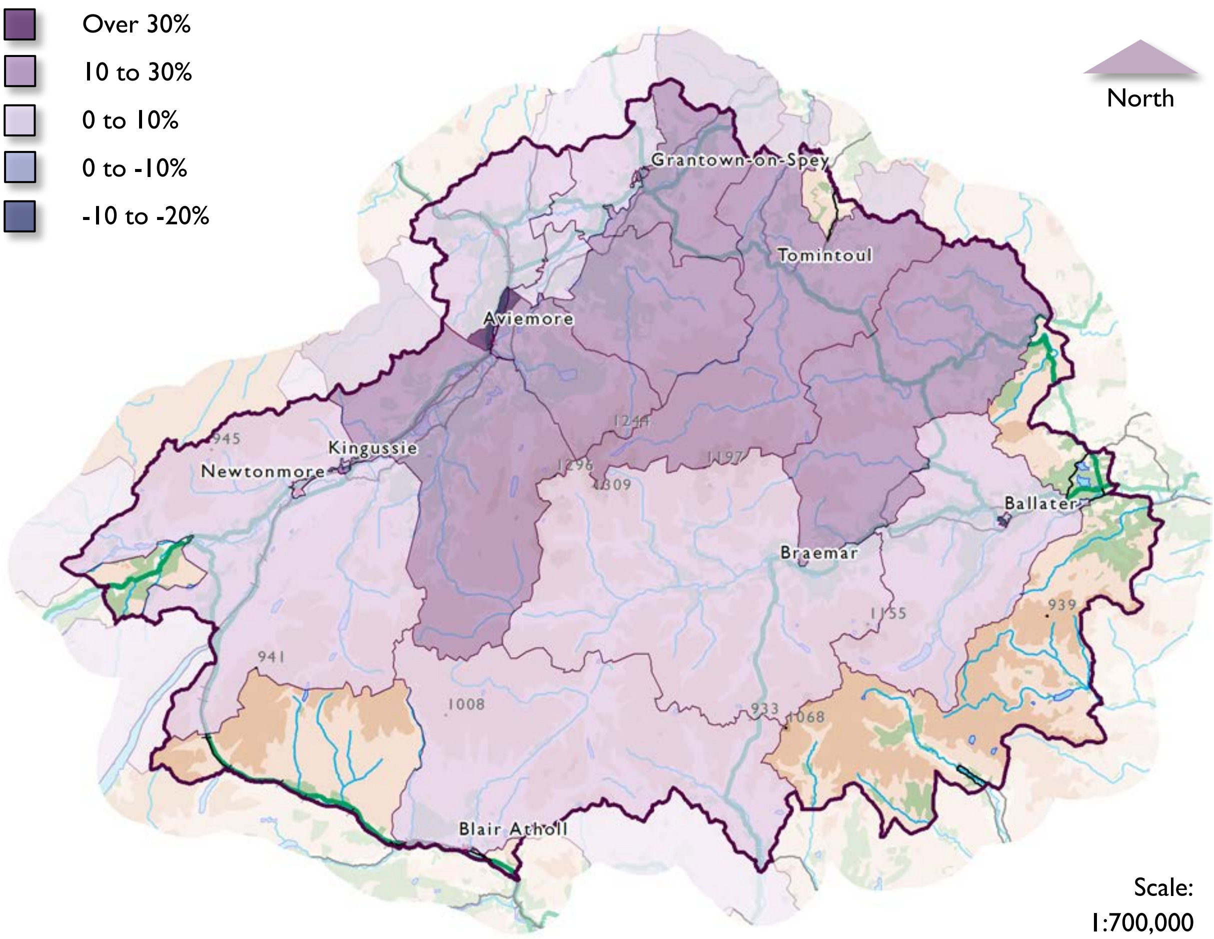

Figure 5 Population change within the Cairngorms National Park between 2001 and 2014 (based on mid-year estimates).

Population projections for the National Park are produced by National Records of Scotland (NRS), with the most recent being 2012 based projections, published in August 2014 (**Figure 6Figure 6**). NRS (2014) estimate that between 2012 and 2037, the population of Cairngorms National Park is projected to rise from 17,540 to 17,660 (an increase of around 1%)[3]. This is a lower level of growth than experienced previously, however since 2010 a reduction in the rate of growth has occurred and should this represent a future trend then the projection is not unreasonable. There is projected to be more deaths than births across the 25 year projection period. Therefore the population increase is due to net immigration to the area, which is assumed to be 50 migrants per year.

[3] The reason that NRS' population estimate for 2012 is lower than the 2014 mid-year estimate quoted on page 5 is due to NRS' omission of data zone S01005147 / S01011981 in their projections; see Appendix 1 (p. 38) for further details.

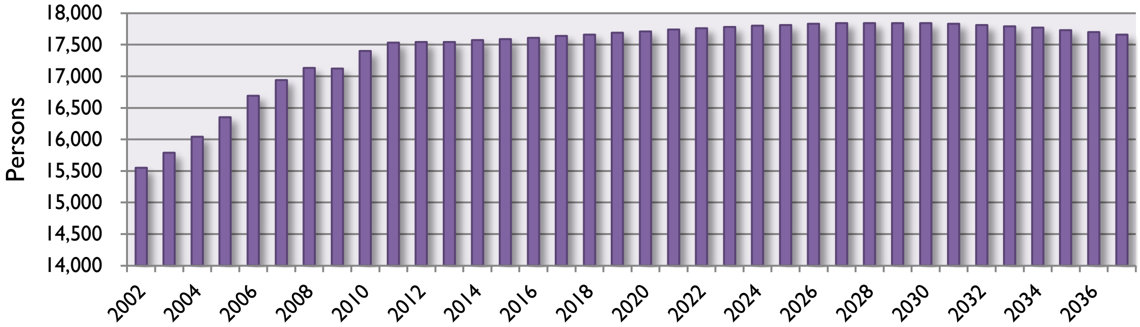

Figure 6 Estimated and projected total population of the National Parks, 2002-2037 (NRS, 2014).

NRS (2014) also give an indication of how the age structure of the population might change (**Figure 7** and **Figure 8**). The number of children aged under 16 is projected to decrease by 15% over the projection period from 2,890 in 2012 to 2,460 in 2037. The number of people of working age is projected to decrease from 10,350 in 2012 to 9,910 in 2037, a decrease of 4%.The population of pensionable age is projected to rise by 23% from 4,300 in 2012 to 5,290 in 2037.

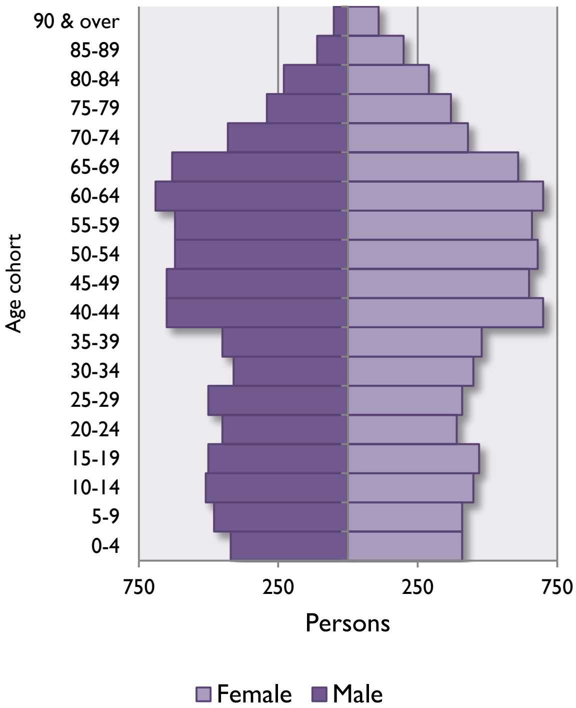

Figure 7 Estimated population profile by age and sex in the Cairngorms National Park in 2012 (NRS, 2014).

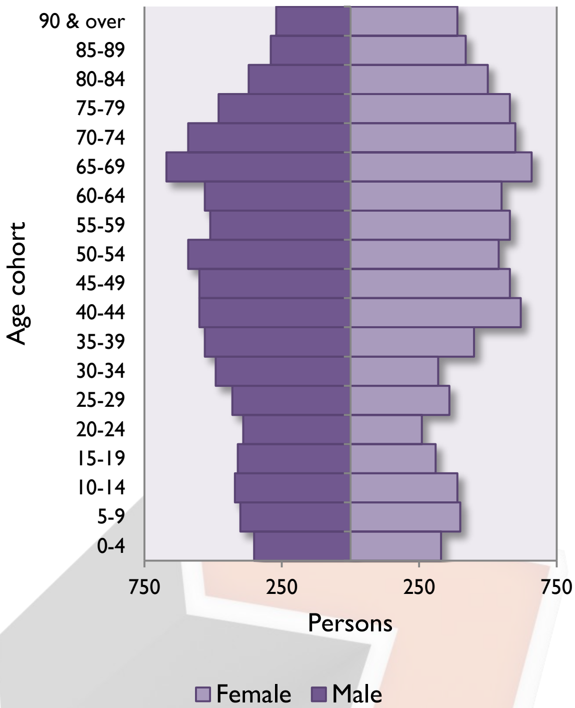

Figure 8 Projected population profile by age and sex in the Cairngorms National Park in 2037 (NRS, 2014).

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 (2014) projections suggest that households are set to increase from 7,870 in 2012 to 8,780 in 2037, an increase of 912 (12%) (**Figure 8** and **Table 1Figure 9**). 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 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 9**).

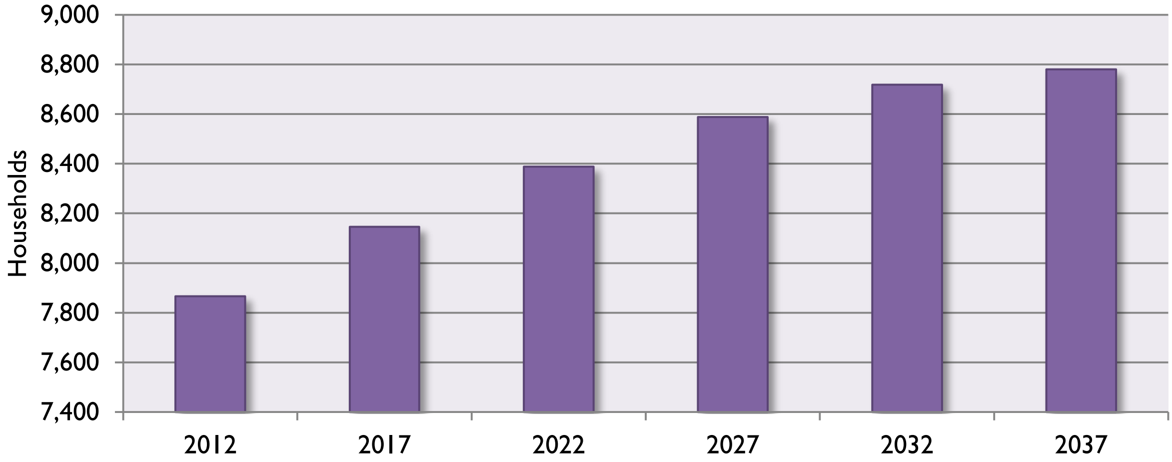

Figure 9 Overall household projections for the Cairngorms National Parks, 2012 to 2037 (NRS, 2014).

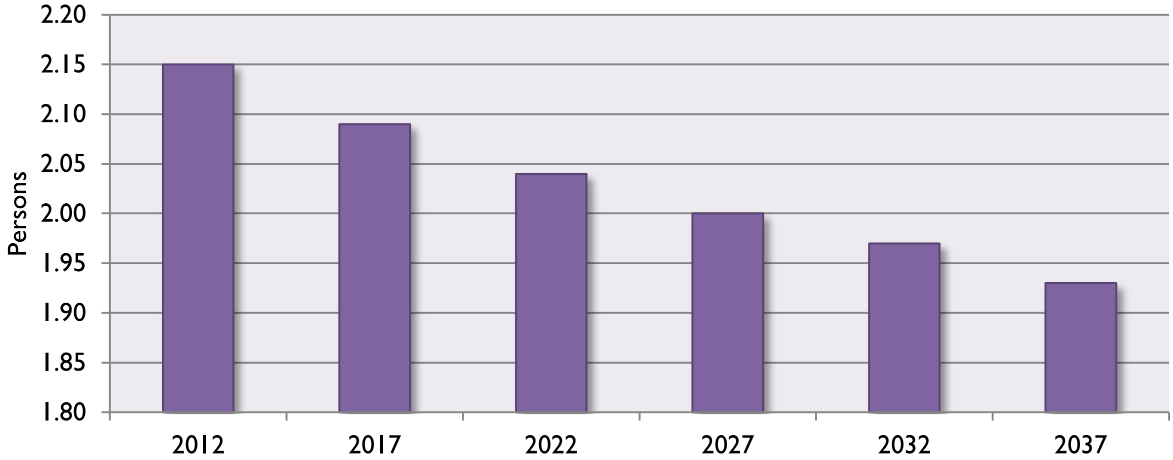

Figure 10 Projected household size for the Cairngorms National Park, 2012 to 2037 (NRS, 2014)

The decreasing average household size is reflected in the changes in the number of households in each household type (**Table 1**). 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 55% 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 15% and 14%, 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 89%, while the number of women in the same age group is projected to increase by 40%, although there will still be more older women than men living alone in 2037.

Table 1 Household projections for the Cairngorms National, by type of household, 2012 to 2037 **(NRS, 2014).**

Household Type	2012	2017	2022	2027	2032	2037	Average annual change 2012-2037	Overall Change 2012-2037	
1 adult	2,632	2,776	2,937	3,091	3,213	3,314	27	682	26%
2 adults	2,869	3,027	3,125	3,211	3,240	3,212	14	342	12%
1 adult with children	403	428	459	484	503	519	5	116	29%
2+ adults with children	1,420	1,386	1,369	1,337	1,325	1,318	-4	-102	-7%
3+ person all adult	542	529	497	467	438	416	-5	-126	-23%
All households	7,866	8,146	8,387	8,590	8,719	8,779	37	912	12%

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.

3.3 Housing Market Characteristics

House Prices and Affordability

Between 1993 and 2013[4], the median price of a property in the Cairngorms National Park saw a net rise of 195%, with a peak in 2011 of £191,000 (**Table 2**). 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 since a peak in 2007. Since 2012, house prices seem to have been reducing, with 2013 returning to pre-2006 levels. It is however difficult to tell if this represents a long term trend or not.

Between 2007 and 2013, 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 improvement, the lower availability of mortgage finance for first time buyers means that many aspiring households still cannot afford to buy.

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

Table 2 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
1993	£56,000	N/A	237	N/A
1992	£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%
2003	£93,250	7.2%	334	-1.2%
2004	£125,000	34%	306	-8.4%
2005	£146,000	16.8%	328	7.2%
2006	£175,000	19.9%	392	19.5%
2007	£180,500	3.1%	414	5.6%
2008	£181,000	0.3%	287	-30.7%
2009	£175,000	-3.3%	229	-20.2%
2010	£190,000	8.6%	289	26.2%
2011	£191,000	0.5%	251	-13.1%
2012	£176,500	-7.6%	230	-8.4%
2013	£165,000	-6.5%	294	-27.8%

There is also considerable variation in the median house prices across the National Park, ranging from £53,000 in Moray, to £272,500 in Perth and Kinross (**Figure 11** and **Figure 12**). The Moray area was the only part of the National Park where in 2013, the median house price / median household income/earnings ratio was below 3, while the Perth and Kinross area had the greatest difference, with median house prices being in the region of 11 times median incomes. However, it should be noted that statistics for these two LA areas represent relatively small sample sizes, with just 8 sales each in that year.

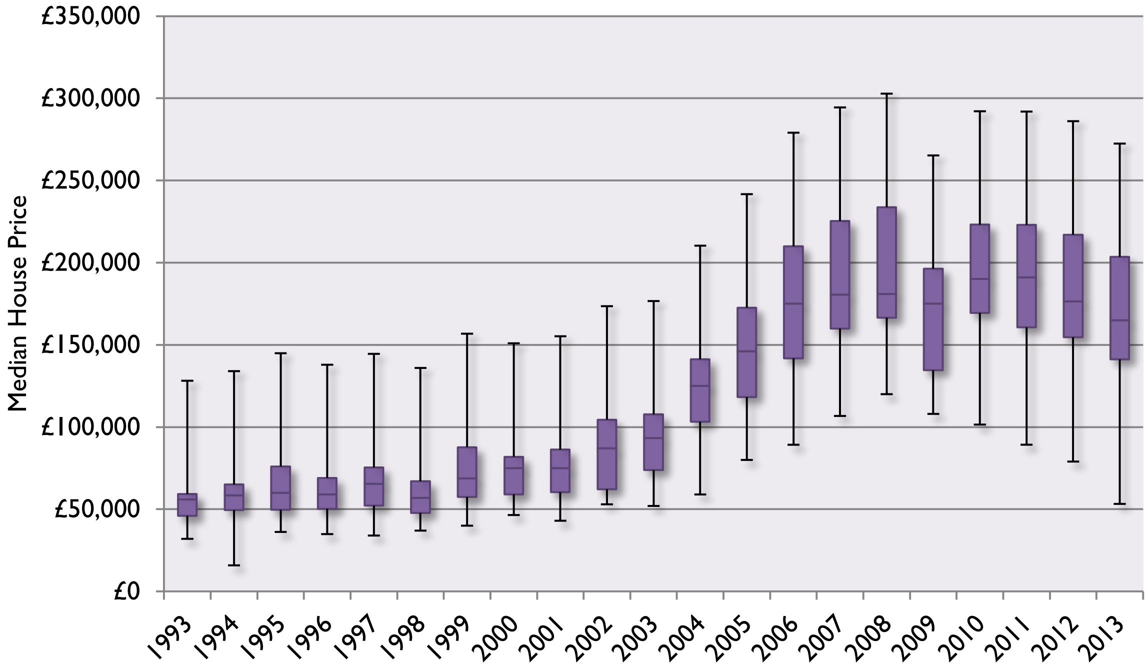

Figure 11 Box plots of Median House Prices of data zones within the Cairngorms National Park (Source: http://www.sns.gov.uk/).

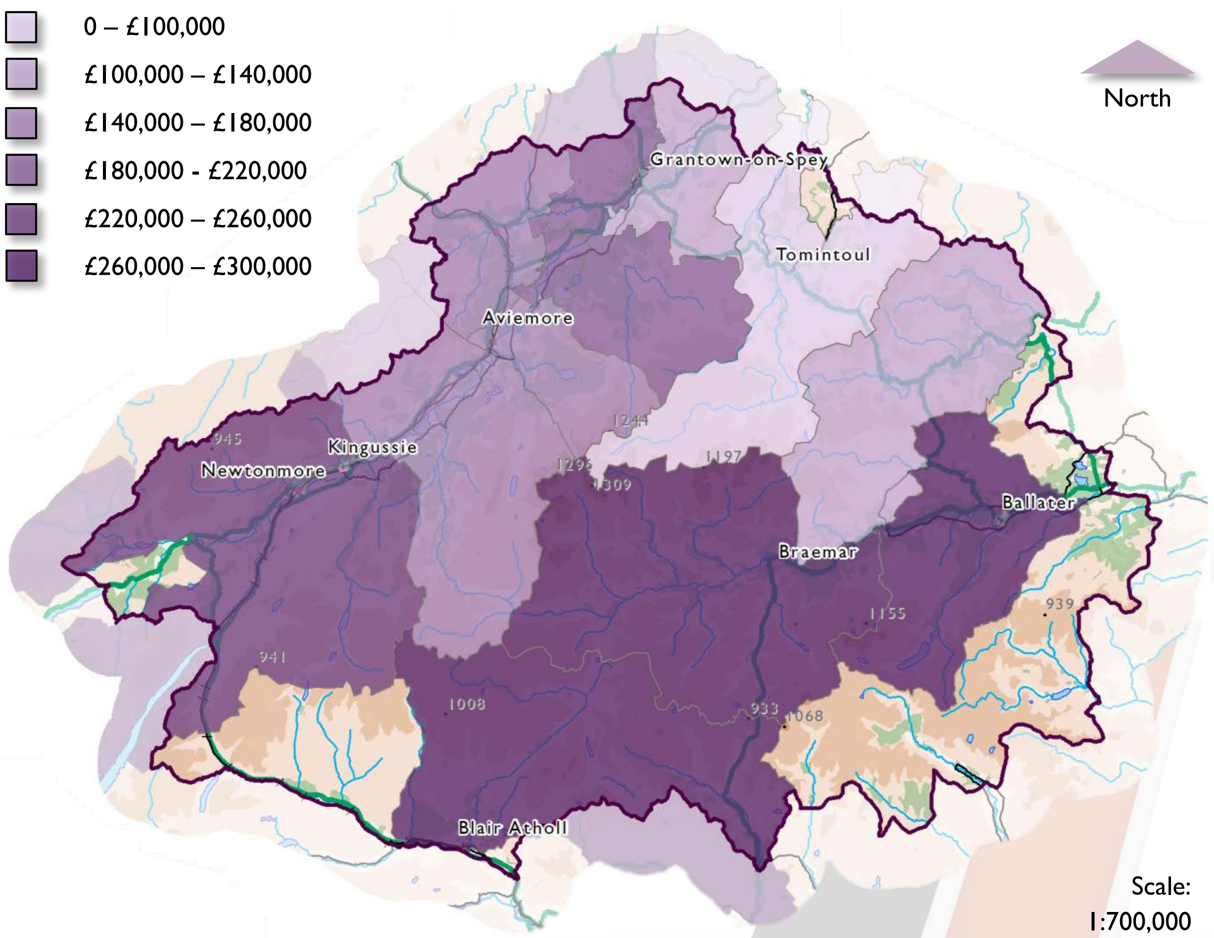

Figure 12 Median House Prices of data zones within the Cairngorms National Park in 2013 (Source: http://www.sns.gov.uk/). Reproduced by permission of Ordnance Survey on behalf of HMSO. © Crown copyright and database right 2016. All rights reserved. Ordnance Survey Licence number 100040965 Cairngorms National Park Authority.

Current Asking Prices

Between the 17th and 18th September 2015 the CNPA undertook a study of the current asking price for property within the National Park based on a search of Estate Agent and property marketing websites. It was found that there were 169 properties for sale within the National Park on these dates, mostly within Badenoch and Strathspey.

According to this sample the median asking price within the National Park was £225,000, which is around 8 times greater than median income/earnings. While this figure is considerably higher than the median sale price achieved in 2013, it is unlikely to equate to the current median sale price, given that negotiation tends to result in a drop in price at the point for sale. It is probable that median prices have risen since 2013, however by what degree is difficult to tell. 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 (**Figure 13** and **Figure 14**) 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 6** and **Table 7**).

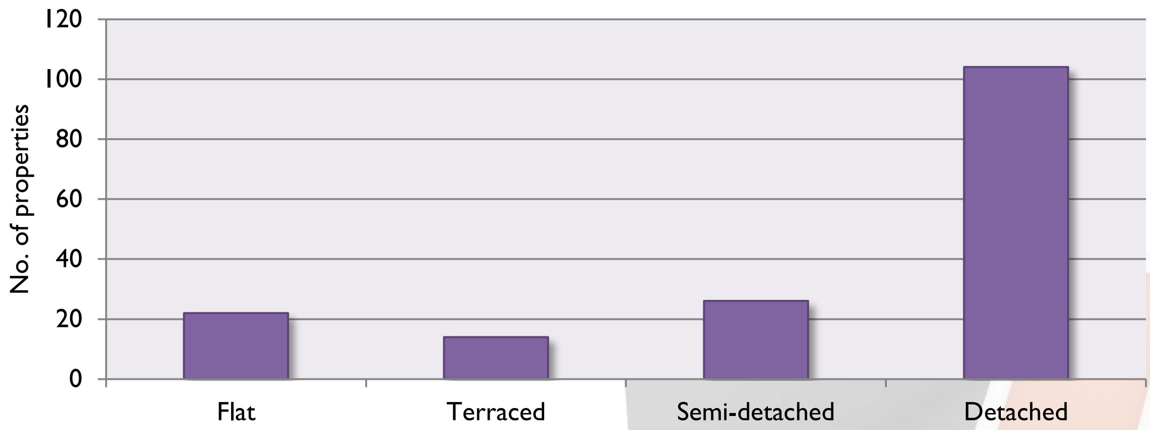

Figure 13 Property types on sale within the Cairngorms National Park, September 2015.

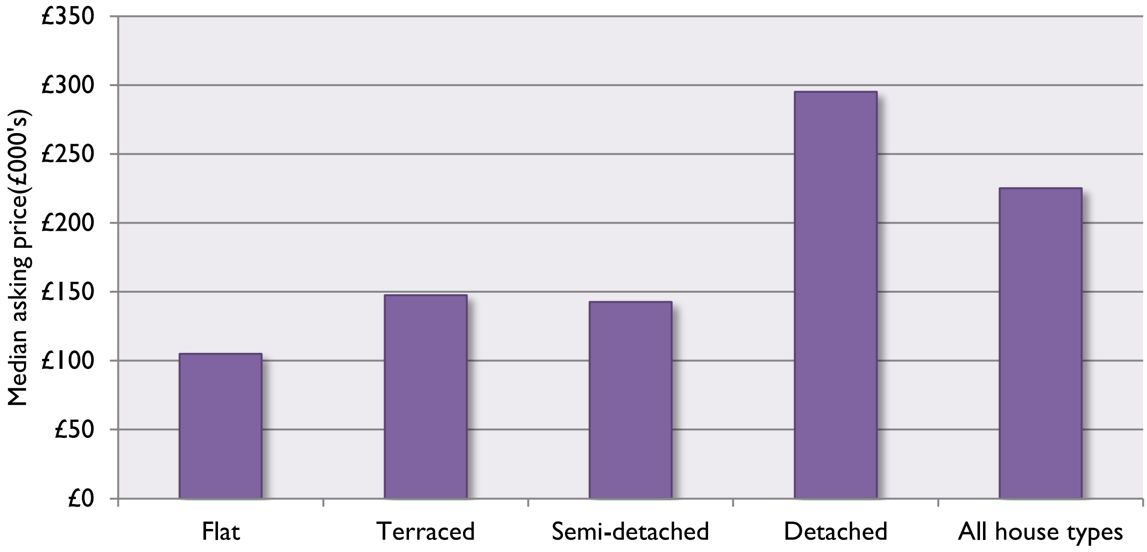

Figure 14 Median asking price by property type the Cairngorms National Park, September 2015.

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 15**). 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**).

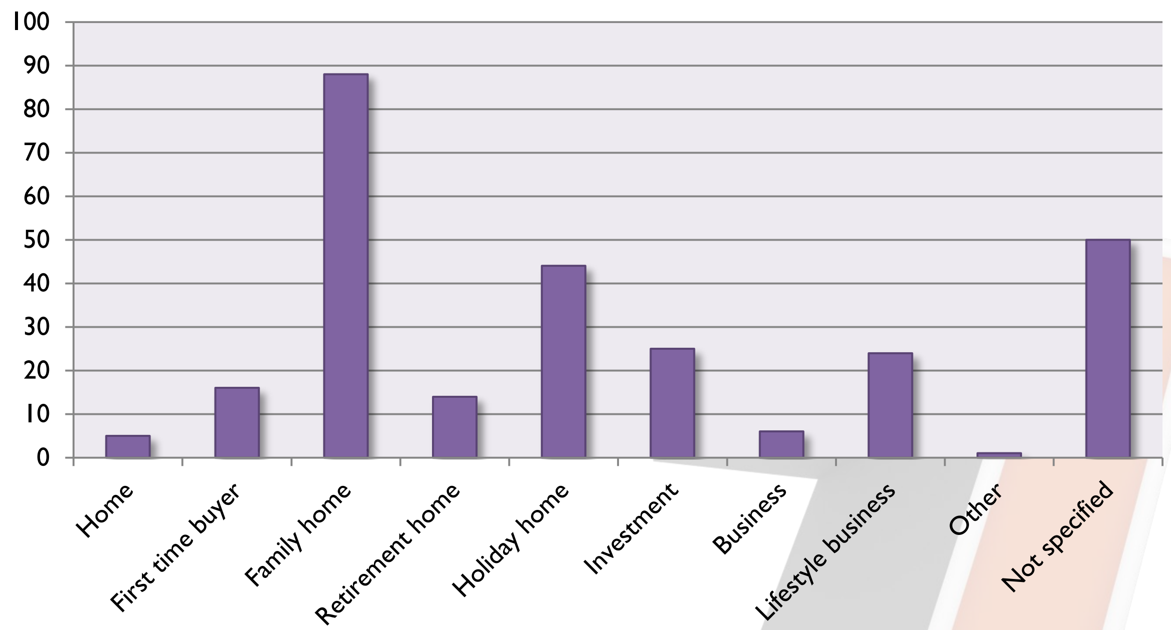

Figure 15 Marketing of properties within the Cairngorms National Park September 2015. Note that most properties are marketed to more than one type of buyer.

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.

Origin of Buyers

The origins of house buyers within the Badenoch and Strathspey Housing Market Area (HMA) (**Table 3**) 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 3 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

The number of new homes completed in the National Park fell following the 'credit crunch' in 2008 and has resulted in an average annual completion rate of around 60 new dwellings (**Figure 16**). The planned ending of the Government's Help to Buy Scheme (Scotland) in 2016, combined with continued constraints on mortgage availability, may further dampened confidence in the housing market and limit the development of new homes.

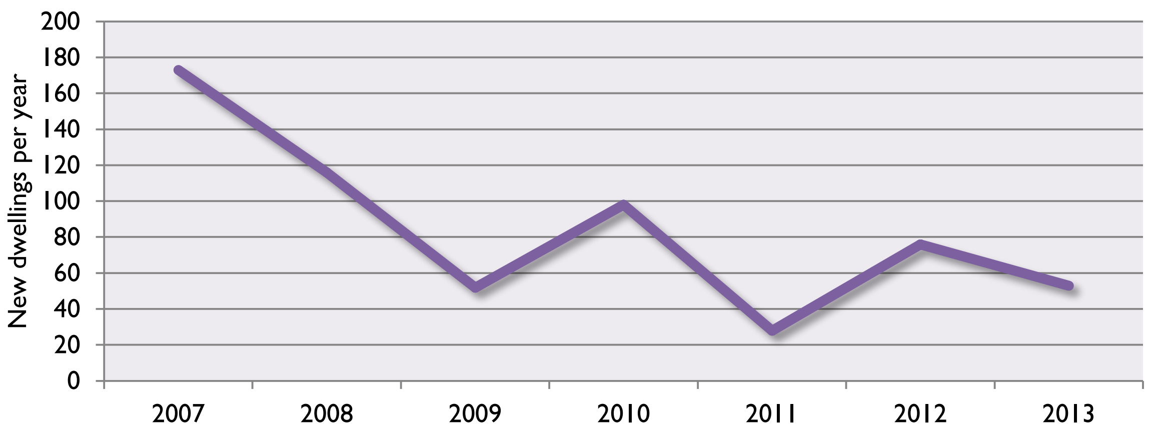

Figure 16 Number of new dwelling per year in the Cairngorms National Park (Source: www.sns.gov.uk/).

Being the area of the National Park in which most development takes place, completions in Badenoch and Strathspey heavily influence this trend with development peaking in 2006, and falling to a nadir in 2013 (**Figure 17**).

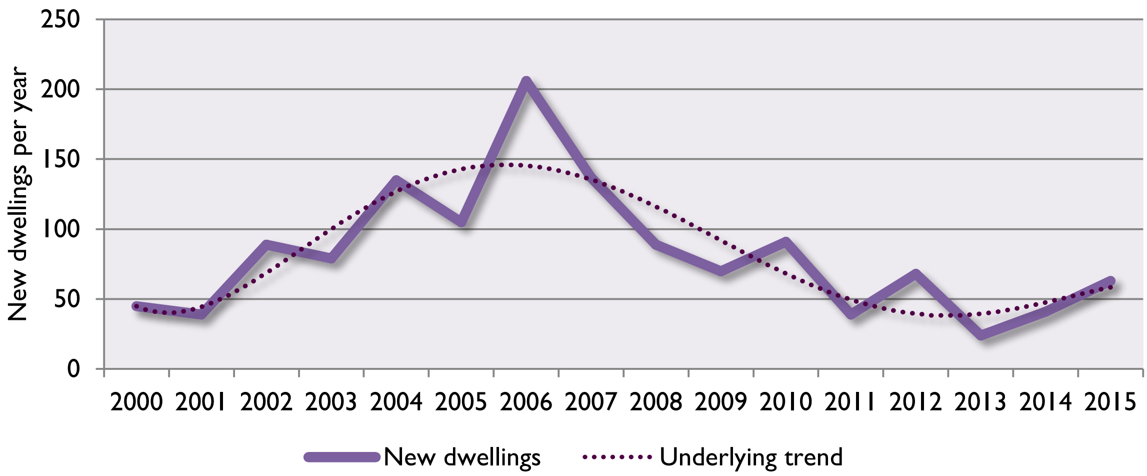

Figure 17 Number of new dwelling per year in Badenoch and Strathspey (**Source:** www.highland.gov.uk/info/205/planning_-_policies_advice_and_service_levels/556/housing_land_information)

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 1005 dwellings completed in the area, 335 met some form of affordable criteria (**Figure 18**). It is unsurprising to find that the completion rates in affordable housing broadly correlate with overall completion rates.

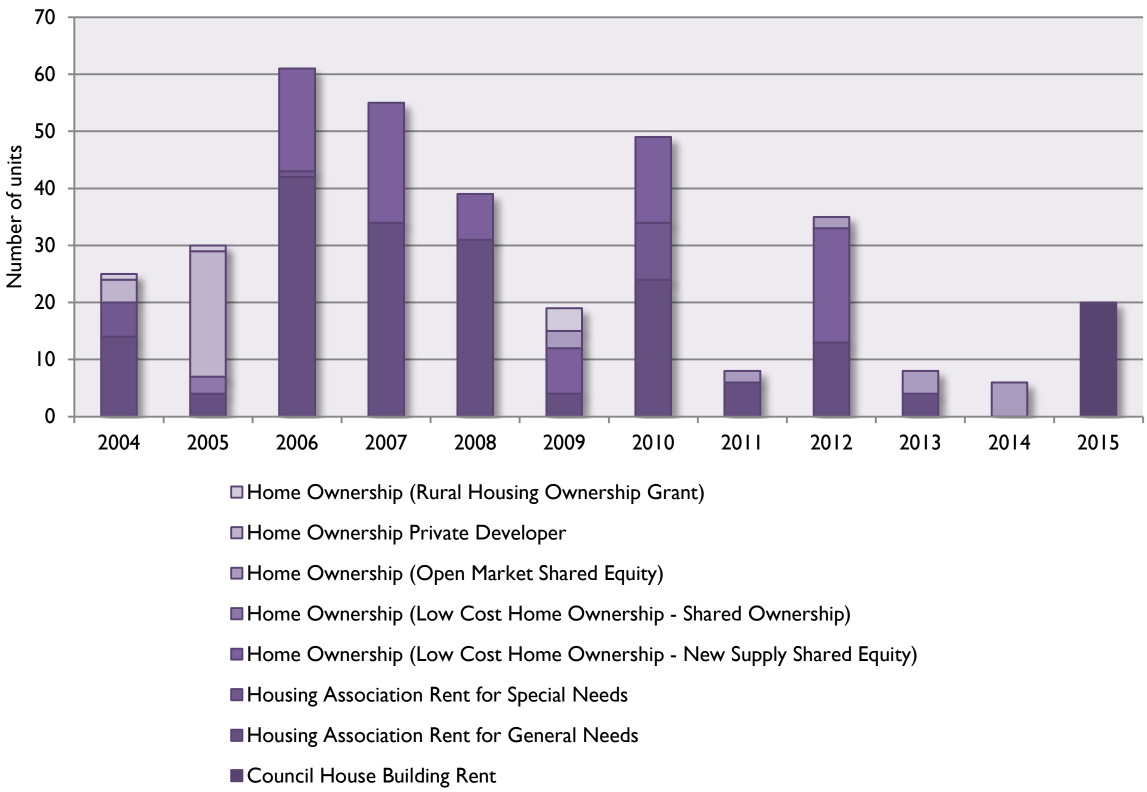

Figure 18 Affordable housing completions by tenure type in Badenoch and Strathspey (Source: Highland Council).

Ineffective Stock

The National Park has a higher proportion of ineffective stock (the sum of second homes and vacant dwellings) than the rest of Scotland (about 16% and 4% respectively) and indeed its surrounding Local Authorities (**Figure 19**)

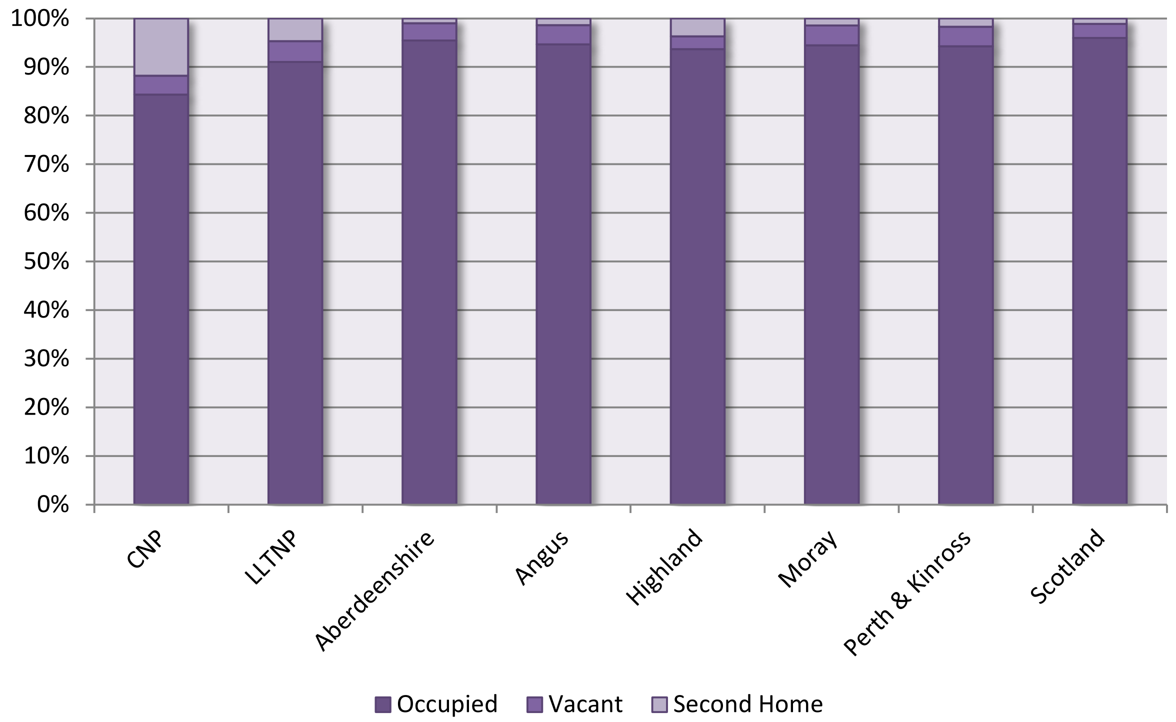

Figure 19 Dwelling occupancy types in the Cairngorms National Park, comparable authorities and Scotland in 2014 (**Source**: http://www.sns.gov.uk/).[5],[6]

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 20**), 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 5%.

[5] CNP: Cairngorms National Park; LLTP: Loch Lomond and Trossachs National Park.
[6] 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.

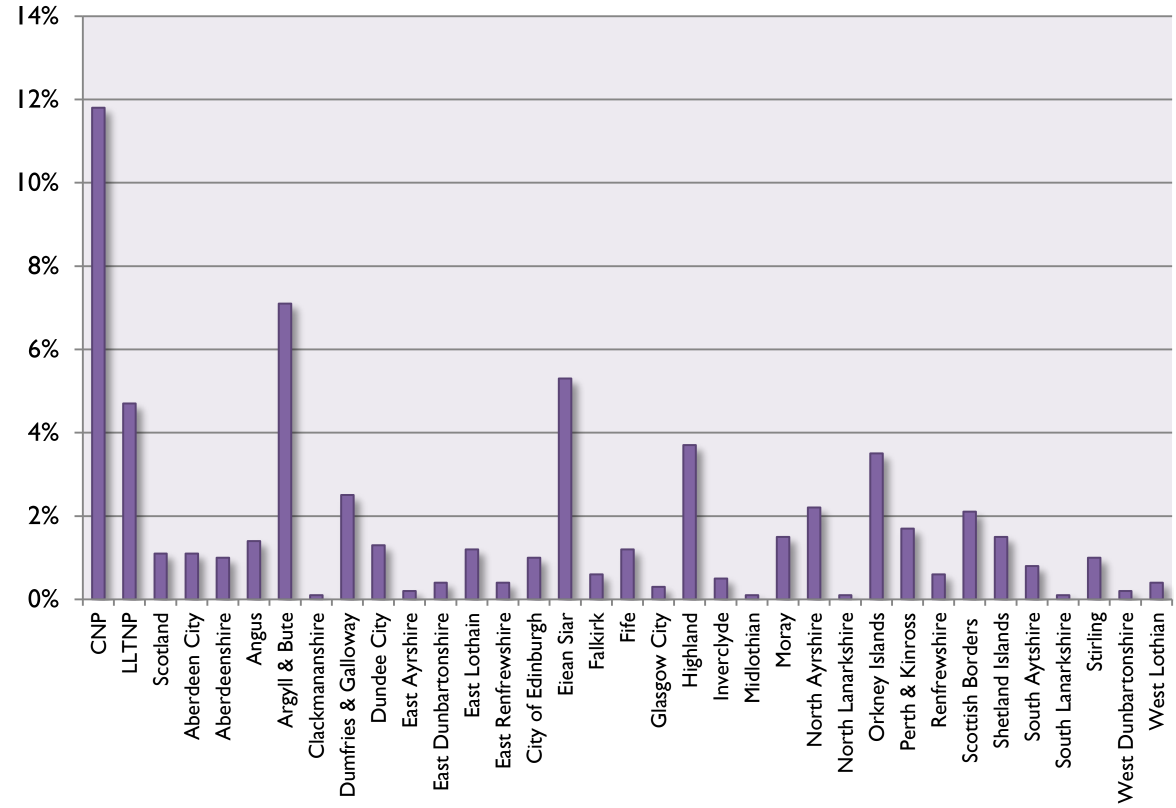

Figure 20 Proportion of dwellings used as second homes by authority area in Scotland in 2014 (**Source**: http://www.sns.gov.uk/).

The level of Second homes is not evenly distributed throughout the National Park, with the proportion of dwellings varying between 2% in data zone S01003764, which covers part of Grantown-on-Spey, and 21% in data zone S01003751, which covers Glenmore. **Table 4** and **Figure 21** shows that overall Badenoch and Strathspey has the lowest proportion of second homes, however, as it is the most densely developed part of the park, it is also home to the greatest number by some considerable margin. At a local level however, parts of Strathspey have levels of ineffective stock that are closer to the rest of the National Park, with the areas around Boat of Garten, Glenmore, Knicraig, Nethy Bridge experiencing levels of around 18% to 21%.

Table 4 Ineffective housing stock in 2014 (Source: http://www.sns.gov.uk/).

Area of National Park	All Dwellings	Occupied Dwellings	Vacant Dwellings	Second Homes	Ineffective Stock
Aberdeenshire	1,919	81%	6%	13%	19%
Highland	7,199	86%	3%	11%	14%
Moray	446	81%	7%	12%	19%
Perth & Kinross	545	76%	9%	15%	24%
CNPA	10,109	84%	4%	12%	16%

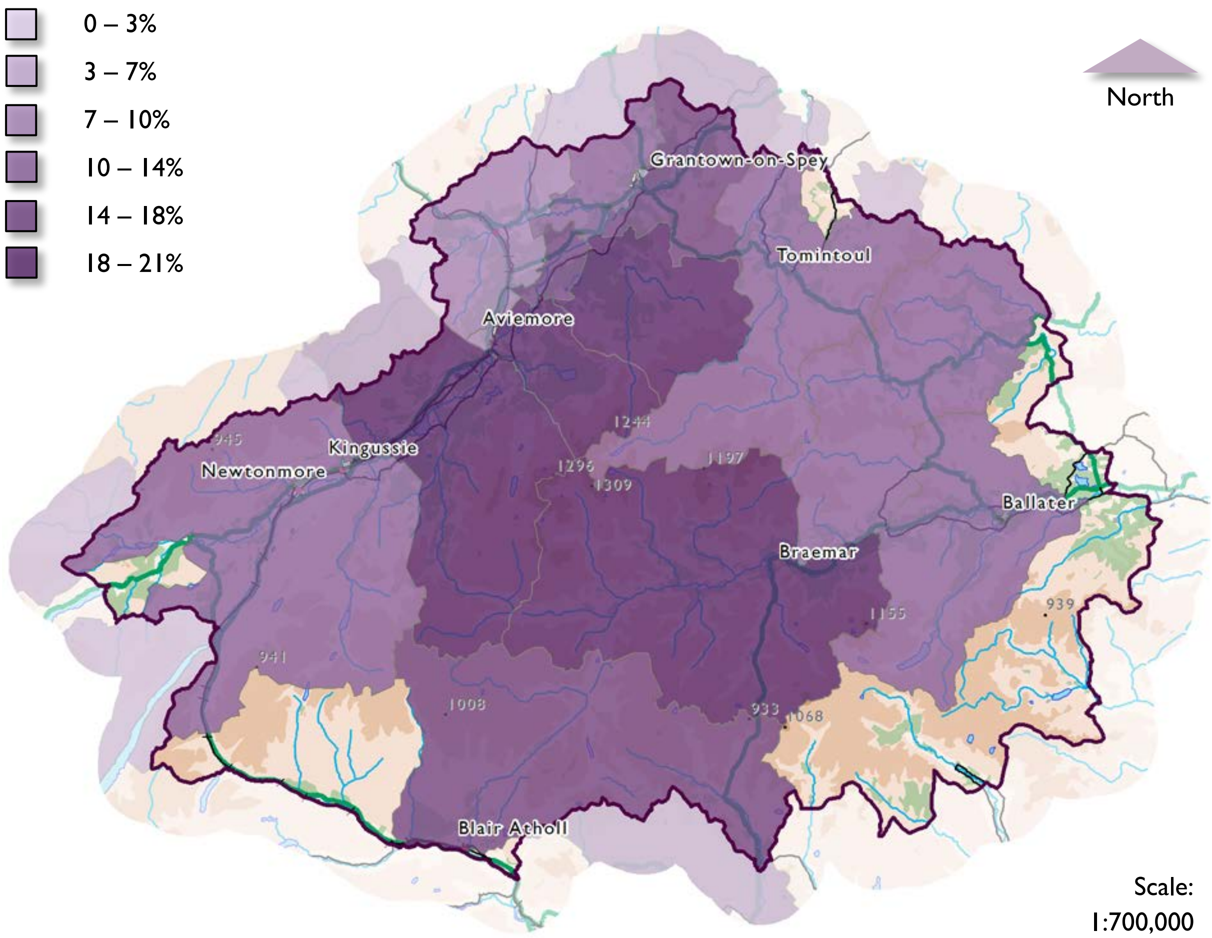

Figure 21 Proportion of second homes by data zone in 2014 (**Source**: http://www.sns.gov.uk/).

Further insight into the nature of second home ownership and ineffective stock can be derived from a comparison with other parts of Scotland. **Figure 22**, which shows the percentage of ineffective stock within each data zone and **Figure 23**, which shows the percentage of second homes, show that the median for both is higher than every other authority within Scotland.

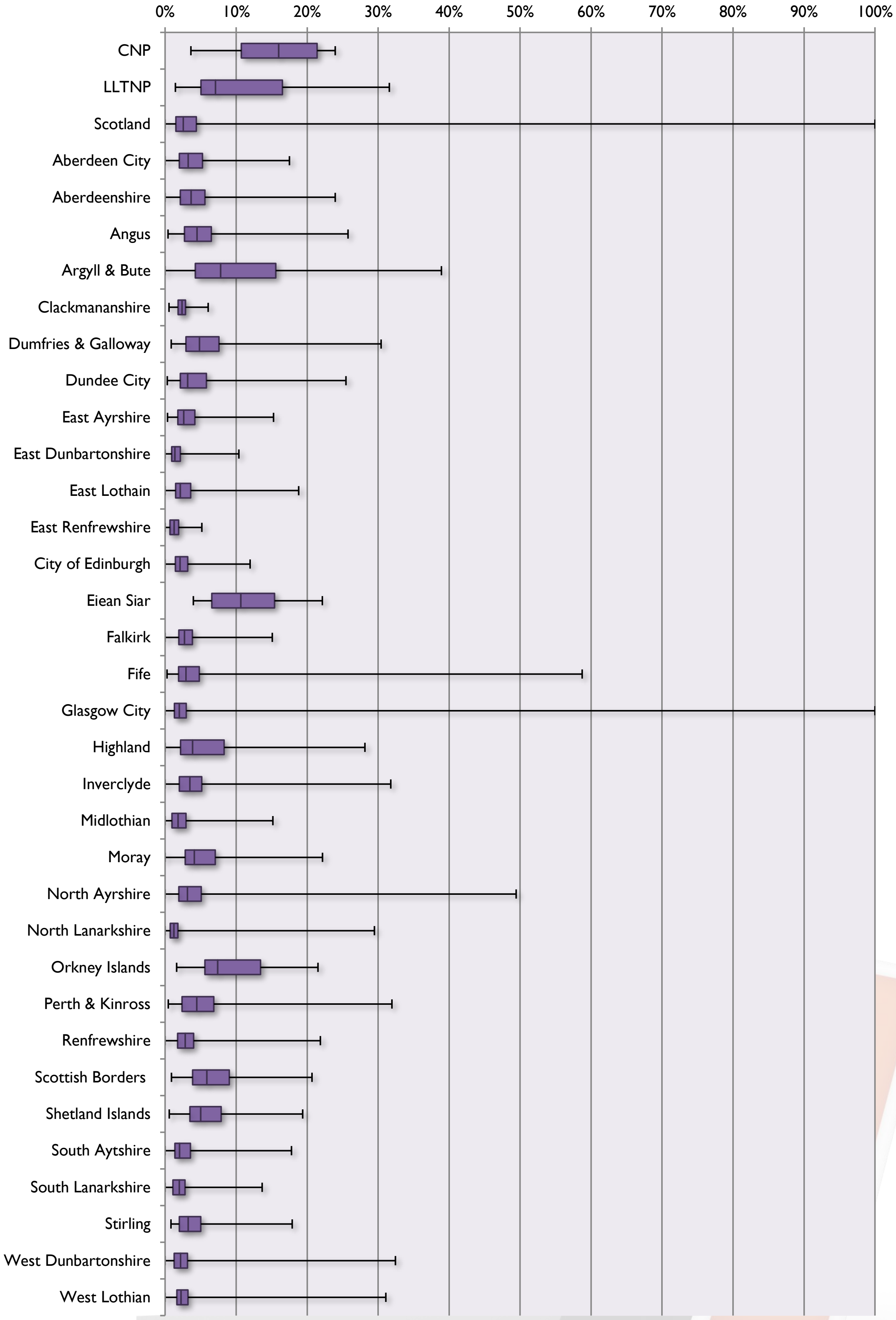

Figure 22 Percentage of dwellings in each data zone that are ineffective stock (vacant and second homes) in each authority area in 2014 (**Source**: http://www.sns.gov.uk/).

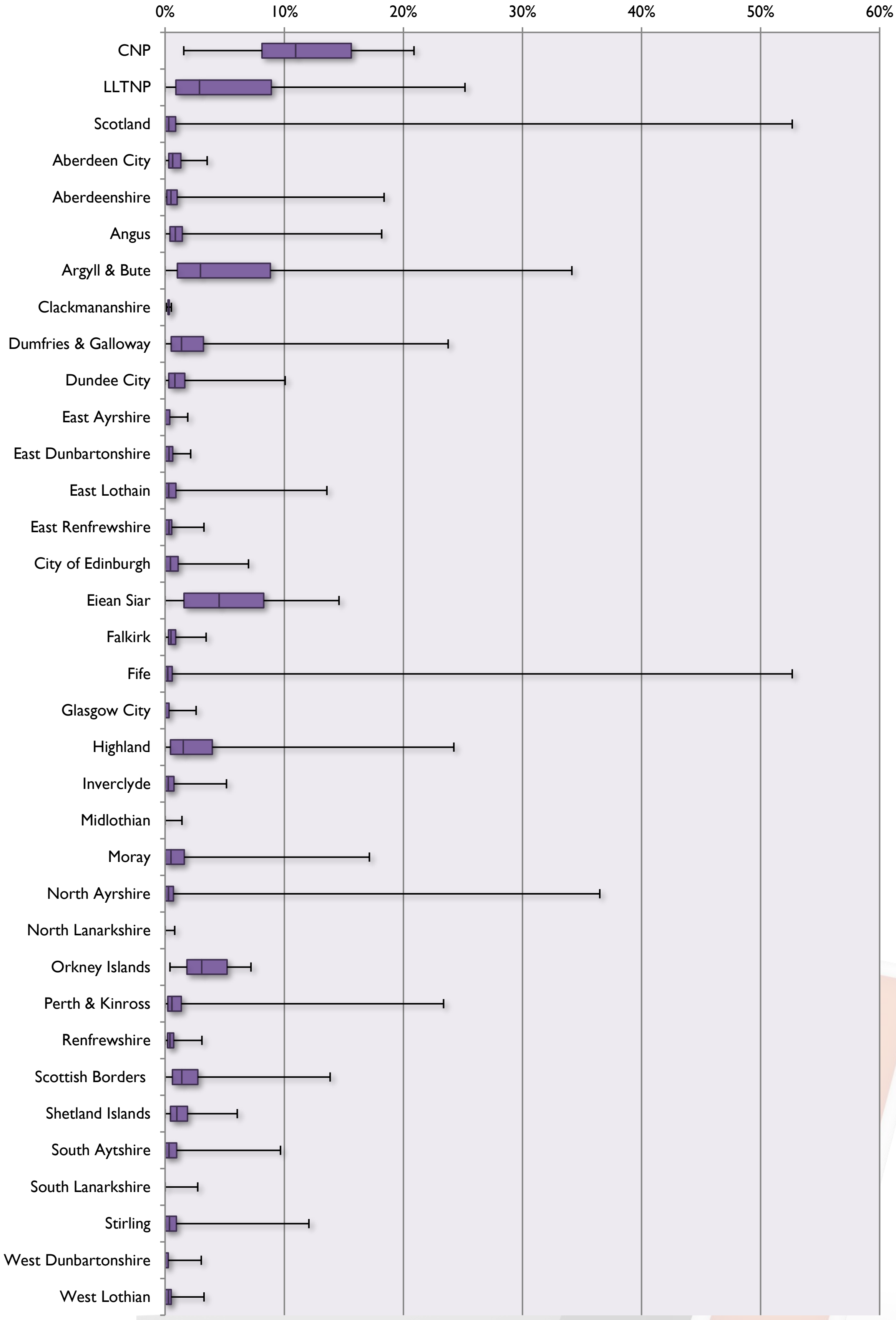

Figure 23 Percentage of dwellings in each data zone that are second homes in each authority area in 2014 (**Source**: http://www.sns.gov.uk/).

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 24), 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.

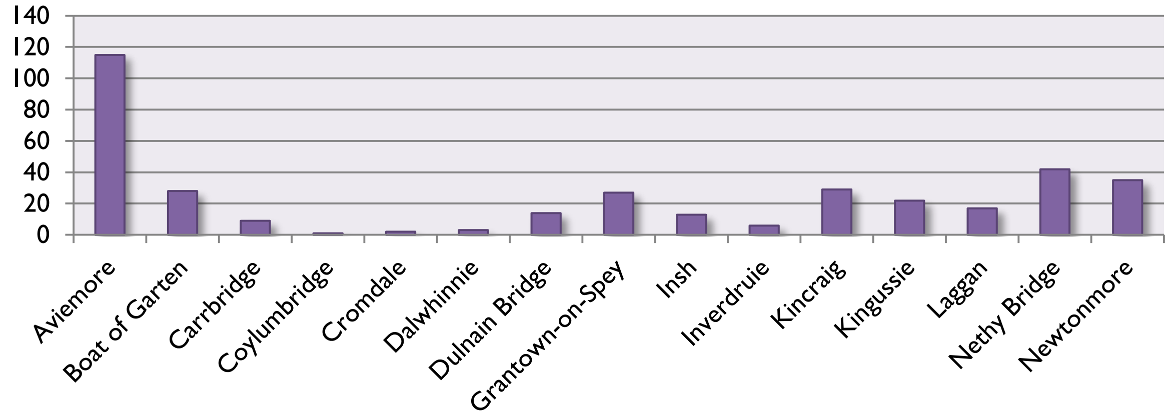

Figure 24 Number of self-catering units within Badenoch and Strathspey by nearest settlement (**Source:** Highland Council).

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 25**). This is an increase of around 3% since 2001.

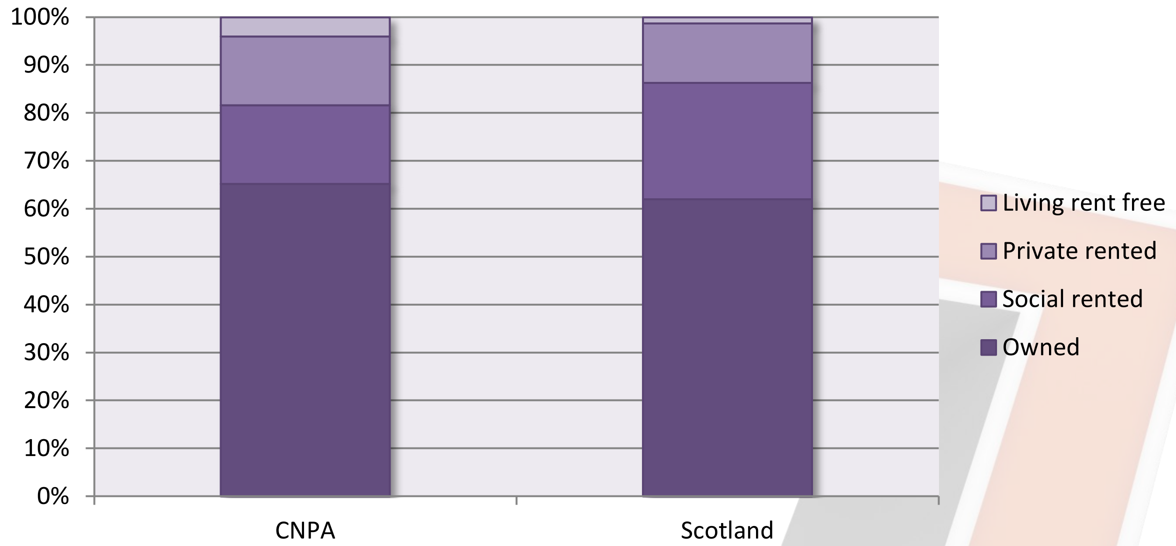

Figure 25 Housing tenue as a proportion of all stock (Census Table QS405SC).

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 26**). 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.

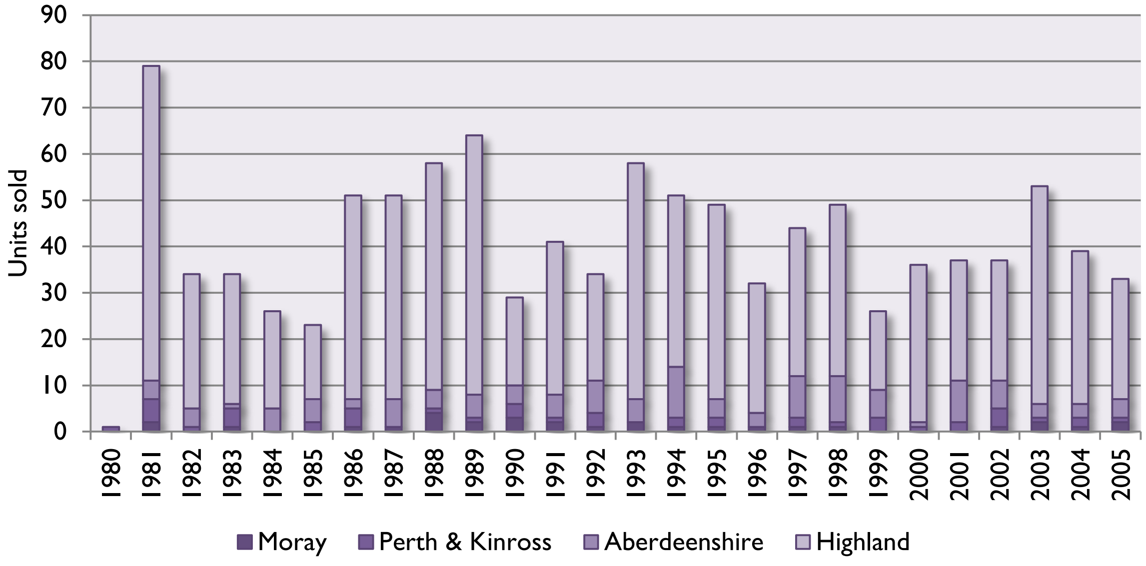

Figure 26 Council houses sold between 1980 and 2005 (**Source**: http://www.sns.gov.uk/).

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 5 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 5 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 6 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 6 Number of properties by size in the Cairngorms National Park in 2013.

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	1916	47	216	284	448	393	238	128	76	35	51	0
Highland	7170	26	701	1682	1863	1168	691	423	177	83	141	215
Moray	421	5	38	52	121	95	51	26	16	5	12	0
PKC	449	4	33	100	118	79	43	25	16	11	13	7
CNPA	9956	82	98	2118	2550	1735	1023	602	285	134	217	222
Scotland	2,532,119	21,638	302,018	741,849	673,791	414,947	188,535	84,796	38,617	16,355	14,007	35,566

Table 7 Proportion of properties by size in the Cairngorms National Park in 2013.

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%	2.5%	11.3%	14.8%	23.4%	20.5%	12.4%	6.7%	4.0%	1.8%	2.7%	0.0%
Highland	100%	0.4%	9.8%	23.5%	26.0%	16.3%	9.6%	5.9%	2.5%	1.2%	2.0%	3.0%
Moray	100%	1.2%	9.0%	12.4%	28.7%	22.6%	12.1%	6.2%	3.8%	1.2%	2.9%	0.0%
PKC	100%	0.9%	7.3%	22.3%	26.3%	17.6%	9.6%	5.6%	3.6%	2.4%	2.9%	1.6%
CNPA	100%	0.8%	9.9%	21.3%	25.6%	17.4%	10.3%	6.0%	2.9%	1.3%	2.2%	2.2%
Scotland	100%	0.9%	11.9%	29.3%	26.6%	16.4%	7.4%	3.3%	1.5%	0.6%	0.6%	1.4%

3.4 Housing Market Areas

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[7] (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.

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.

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.

Aberdeen City and Shire 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 HMA) so it does not have any significant effect to the outcome of the assessment.

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.

[7] 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.

Angus Council HNDA (2010) places the area of Angus within the Cairngorms National Park within the West Angus HMA. The HMA 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 27**) in the Angus area of the National Park, which lead 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.

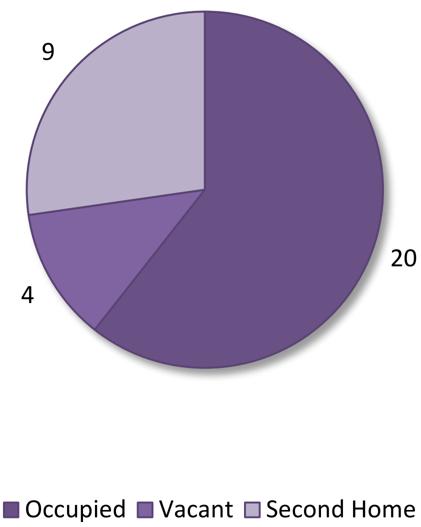

Figure 27 Occupancy of dwellings within the Angus part of the Cairngorms National Park September 2015 (source: Angus Council).

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.

The 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 rural Highland Perthside is not a functional HMA. The CNPA must therefore take into account any other information available to provide the needed land supply. If no such information is available, a policy approach may be used to meet need and demand,

The Cairngorms National Park is therefore 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 Perth and Kinross' 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 the West Angus HMA, it excluded from any part of the analysis of housing need and demand in that area.

3.5 HNDA Conclusions

Highland Council

Highland Council's HNDA 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

Table 8 Continued Growth Scenario: Additional Housing Units by Tenure in Badenoch and Strathspey HMA 2015/16 to 2034/35 (Highland Council, 2015).

Social Rent	553
Below Market Rent	254
Private Rented Sector	525
Buyers	327
Total Requirement	1,659
Requirement as % of Current Housing Stock	23.2%

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).

The Highland Housing Market Partnership has therefore decided to adopt a planning 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. Based on the need identified in Badenoch and Strathspey HMA, the area been given a target of 100 new dwellings per year (**Table 8**). This figure includes ineffective stock (vacant plus second / holiday homes). It is notable that around 49% of this identified need should be delivered as either social or below market rent properties. The rate that net inward migration required to reflect this planning target is 135 (Highland Council, 2015).

Aberdeen City and Shire Strategic Development Planning Authority

As has been mentioned the Aberdeenshire part of the National Park forms part of Aberdeen City and Shire's HNDA's Rural HMA. The HNDA estimates an annual housing need of 632 new dwellings within the whole 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 4.5 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 estimate need for a total of 90 new dwellings, although this figure is in reality likely to much higher given

Table 9 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	4.5
Annual estimate of affordable housing	206	1.5
Annual Estimate market housing	426	3

the local undersupply of smaller housing and the low levels of development over that past 20 years or so.

Moray Council

The Moray HNDA (Moray Council, 2011) 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.

Angus Council and Perth and Kinross Council

No conclusions relating to the National Park can be drawn from these HNDAs, therefore in these areas the CNPA must take into account any other information available to provide the needed land supply. If no such information is available, a policy approach may be used to meet need and demand.

3.6 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 10 sets out the housing land supply effective at the time of the Cairngorm National Park LDP's adoption on 27th March 2015. The information will require updating because since it was published certain planning consents have expired while others have been gained. However, at the time of adoption consent existed for some 2,545 dwellings, which alone is greater than the 5 year effective land supply. Coupled with the supply provided by the LDP's housing allocations, and the fact that no planning consents have lapsed since the adoption of the LDP that would result in the effective land supply falling below the 5 year threshold, these figures indicate that there is currently no issue with the land supply within the Cairngorms National Park.

The delivery of these sites will however 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 10 Housing Land Supply 2014-2034 as set out in the Cairngorms National Park Local Development Plan (2015)

Settlement	Site Name	Status	Consent	Remaining Capacity	Effective land supply 0-5 years	Total land supply 0-5 years	Effective land supply 5-10 years	Total land supply 5-10 tears	Effective land supply 0-20 years	Total land supply 00-20 years
Angus										
Aberdeenshire										
Ballater	H1: Monaltrie Park	Allocation	0	250	50	50	50	50	250	250
	Site: H2: Sir Patrick Geddes Way	Allocation	0	8	8	8	0	0	8	8
Braemar	EP1: Balnellan Road	Consent	25	17	17	17	0	0	17	17
	EP2/EP3: St Andrews Terrace/ Kindochit Court	Consent	41	41	41	41	0	0	41	41
	EP4: Invercauld Farm,	Consent	12	4	4	4	0	0	4	4
	H1: Chapel Brae	Allocation	0	6	6	0	0	0	0	6
Dinnet	H1: Land to the West	Allocation	0	4	4	4	0	0	0	4
	H2: Land to the East	Allocation	0	15	0	15	0	0	0	15
Aberdeenshire Total			78	345	130	139	50	50	320	345
Highland										
An Camas Mòr	EP: An Camas Mòr	Consent	1500	1500	133	275	392	392	1025	1025
Aviemore	EP1: Horsefield, Aviemore Highland Resort	Consent	140	113	63	63	50	50	113	113
	EP2/EP3: Dalfaber	Consent	93	114	69	69	45	45	114	114
	EP4: Grampian Road	Consent (windfall)	20	20	20	20	0	0	0	20
	EP5: Highburnside	Consent (windfall)	46	23	23	23	0	0	23	23
	EP6: Milton Place	Consent (windfall)	25	25	25	25	0	0	0	25
	Additional windfall consents	Consent (windfall)	8	8	8	8	0	0	8	8
	EP7: Granish Way	Consent (windfall)	6	6	6	6	0	0	6	6
Boat of Garten	EP1: West of Boat of Garten	Consent	32	32	32	32	0	0	0	30
	Additional windfall consents	Consent (windfall)	4	4	4	4	0	0	4	4

Settlement	Site Name	Status	Consent	Remaining Capacity	Effective land supply 0-5 years	Total land supply 0-5 years	Effective land supply 5-10 years	Total land supply 5-10 tears	Effective land supply 0-20 years	Total land supply 00-20 years
Carrbridge	H1: Carr Road	Allocation	0	72	36	36	36	36	72	72
	H2: Crannich Park	Allocation	0	22	22	22	0	0	22	22
	EP1: Land by Crannich Park, Rowan Park and Carr Road	Consent	117	(117)	0	0	0	0	0	(117)
	Additional windfall consents	Consent (windfall)	9	9	9	9	0	0	9	9
Cromdale	EP1: Auchroisk Park	Consent (windfall)	22	22	22	22	0	0	0	22
	H1: Kirk Road	Allocation	0	20	20	20	0	0	0	20
Dalwhinnie	H1: Opposite Community Hall	Allocation	0	6	0	0	6	6	6	6
	EP1: Site at Ben Alder Road	Consent	5	5	5	5	0	0	5	5
	H2 Land by Garage	Allocation	0	6	0	0	6	6	6	6
Dulnain Bridge	H1: West of Play Area	Allocation	0	30	30	30	0	0	30	30
	EP1: Adjacent to A938	Consent	10	10	10	10	0	0	6	6
	EP2: Church Terrace	Consent (windfall)	2	2	2	2	0	0	0	2
	Additional windfall consents	Consent (windfall)	6	6	6	6	0	0	6	6
Grantown-on-Spey	H1: Beachen Court	Allocation	0	50	30	30	20	20	50	50
	H2: Castle Road	Allocation	0	20	20	20	0	0	0	20
	EP1: Strathspey Hotel	Consent (windfall)	8	8	8	8	0	0	0	8
	Additional windfall consents	Consent (windfall)	4	4	4	4	0	0	4	4
Kincraig	H1: Opposite School	Allocation	0	40	10	10	15	15	40	40
	EP1: Ardgeal	Consent (windfall)	10	6	6	6	0	0	0	6
Kingussie	EP1: Land between Ardbroilach Road and Craig an Darach	Consent	300	300	50	50	90	90	300	300

Settlement	Site Name	Status	Consent	Remaining Capacity	Effective land supply 0-5 years	Total land supply 0-5 years	Effective land supply 5-10 years	Total land supply 5-10 tears	Effective land supply 0-20 years	Total land supply 00-20 years
	EP2: St Vincents Terrace	Consent (windfall)	4	4	4	4	0	0	0	4
Nethy Bridge	H1: Craigmore Road	Allocation	0	15	15	15	0	0	15	15
Newtonmore	H1: Land between Perth Road and Station Road	Consent	81	120	40	40	37	37	120	120
Highland Total			2,452	2,622	732	874	697	697	1,988	2,145
Moray										
Tomintoul	H1: Land to the North East	Allocation	0	8	0	8	0	0	0	8
	H2: Lecht Drive	Allocation	0	15	8	8	0	0	8	8
	EP1: Tomnabat Lane	Consent	1	1	1	1	0	0	1	1
	EP2: 57 Main Street	Consent	8	8	8	8	0	0	8	8
Moray Total			9	32	17	25	0	0	17	25
Perth & Kinross										
Killiecrankie	EP1: Railway Yard,	Consent (windfall)	6	6	6	6	0	0	6	6
Perth & Kinross Total			6	6	6	6	0	0	6	6
CNPA Total			**2,545**	**3,005**	**885**	**1,044**	**747**	**747**	**2,331**	**2,521**

3.7 Constraints to Delivery

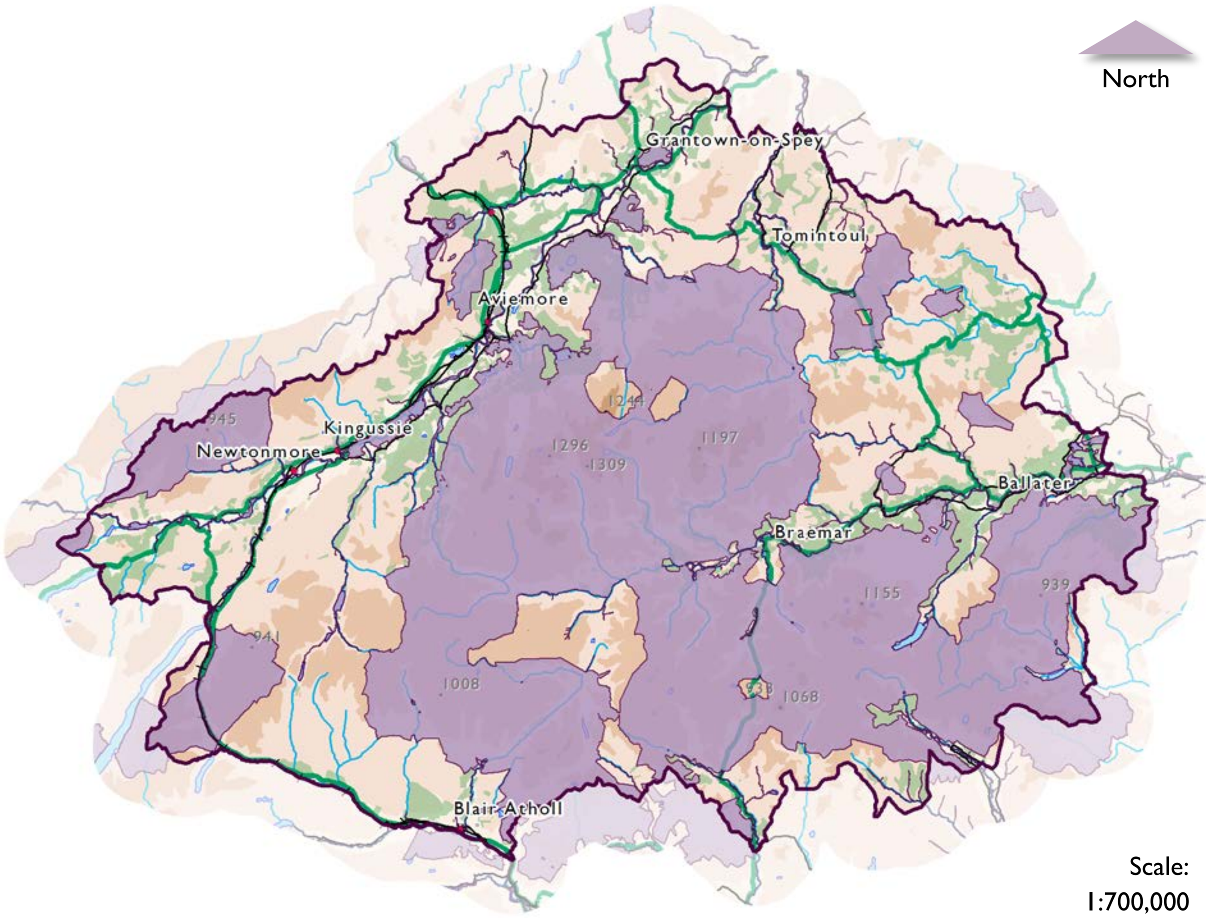

Figure 28 Land within the Cairngorms National Park that is protected by Natura legislation.

It has been shown that the level of completions has dropped within the National park since the onset of the credit crunch in 2008. However, with the availability of capital becoming scarcer, this is not a scenario specific to the National Park and affects many authorities, both urban and rural, within the UK. Where this does have a specific impact on the National Park however, is its peripheral position in comparison to the major HMAs and the generally higher nature conservation and landscaping standards demanded of development. When capital is scarce and the business risks perceived as being higher, the market will generally target the 'low hanging fruit' first, giving more constrained sites, such as those in the National Park, a lower priority, if not avoiding them altogether.

With around half of the National Park designated within the Natura 2000 network (**Figure 28**), sites which are considered the best for wildlife in Europe, one of the greatest challenges facing the National Park Authority is the delivery of housing while avoiding adverse effects on the qualifying features of protected sites. Of particular significance is the connectivity of woodland sites within Badenoch and Strathspey, since this is the area in which the majority of the National Park's population live and where the greatest pressure for development exists. Consequently, the choice of sites to meet the National Park's identified long term need is limited and the mitigation required to deliver potential sites complex.

4. SUMMARY

Issues

- 2014 mid-year estimates indicate that the population of the National Park is around 18,594.
- According to NRS estimates, the population of the National Park is set to grow from around 17,540 in 2012 to 17,660 in 2037 (an increase of around 1%)[8].
- According to NRS estimates, households are set to grow from 7,870 in 2012 to 8,780 in 2037 (an increase of around 12%).
- The Median house price to median household income/earnings ratio was 7 times income in 2013 when the median house price was £165,000.
- Median asking price in September 2015 was £225,000.
- There is a shortage of small and / or affordable properties on the market.
- Owing to the outstanding quality of the National Park's natural environment, there is a limited choice of sites capable of delivering future housing need.
- Since the credit crunch the number of housing completions has been falling within the National Park.
- There is a need to address certain gaps in data such as the number of dwellings within Aberdeenshire paying non-domestic rates.

Targets / Preferred Direction

- Making sure that when new housing is built, more of it is accessible to people who live and work in the National Park through influencing scale and tenure of housing;
- Delivering more affordable housing as a proportion of all new development;
- Increasing the level of investment in affordable housing and infrastructure on key sites;
- Ensuring the delivery of key strategic sites;
- Maintaining high design standards appropriate for a National Park;
- Helping communities make the most of any right to buy land in order to secure local housing solutions; and • Reducing the proportion of second and holiday homes in the National Park.

Mechanisms

- The National Park Partnership Plan as the land-use strategy for the National Park.
- The Local Development Plan and Action Programme.
- Local Authority Housing Strategies.

[8] The reason that NRS' population estimate for 2012 is lower than the 2014 mid-year estimate quoted on page 5 is due to NRS' omission of data zone S01005147 / S01011981 in their projections; see Appendix 1 (p. 38) for further details.

Key Questions

- How can more housing that is affordable to people working in the National Park be delivered?
- How can the proportion of second home ownership in the National Park be reduced?
- How can best use be made of the existing land supply (eg what types of housing should be prioritised)?

5. REFERENCES AND FURTHER INFORMATION

Aberdeen City and Shire Strategic Planning Authority. (2011). *Aberdeen City and Shire Housing Need and Demand Assessment.* Aberdeen: Aberdeen City and Shire Strategic Planning Authority.

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APPENDIX 1: 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.

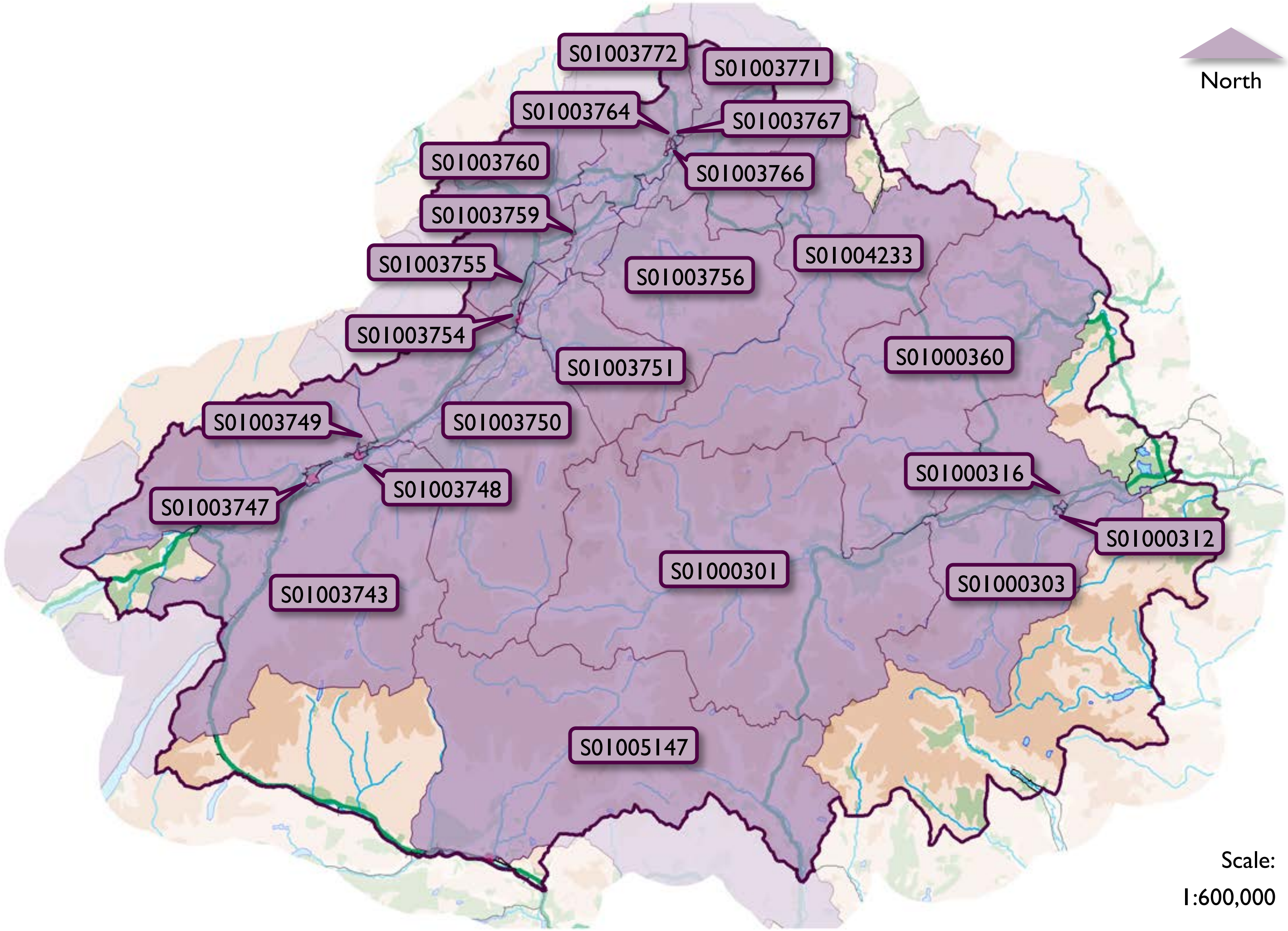
Data zones are the standard small area geography used by the Scottish Government (SG). In general they have populations of between 500 and 1,000 residents. Data zone boundaries do not exactly match the National Park boundary and so, for the purpose of statistical analysis, data zones are included or 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.

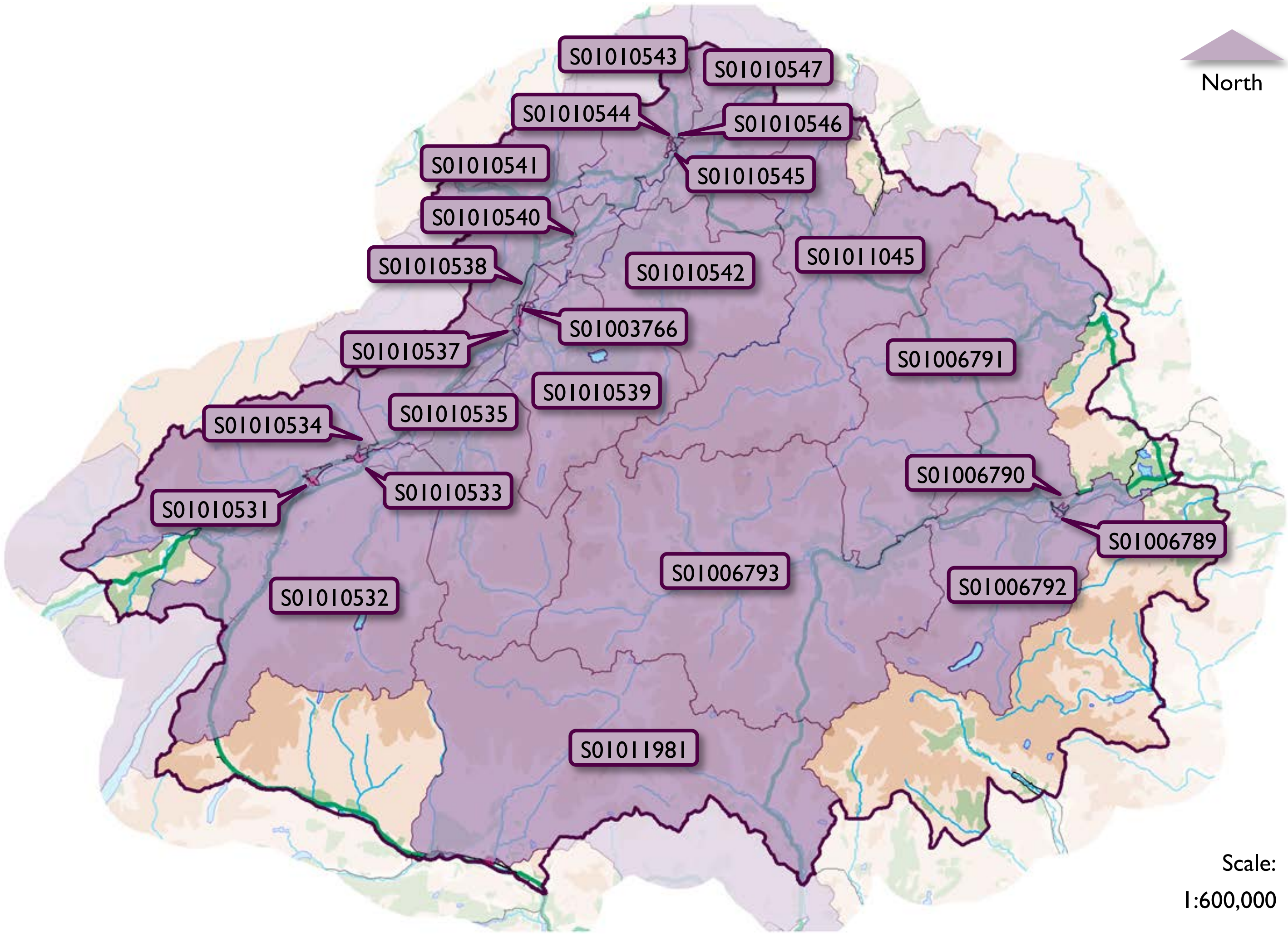
This difference does not however result in a significant problem when considering NRS' population projections, since it is not the headline population that generates a policy response, but the rate and scale at which change occurs. Since data zone S01005147 / S01011981's population was only estimated to be 923 in 2013 and the fact that it saw no statistically significant change over the period of 2001-2013 (an estimated net decrease of 2 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 29 and Figure 30have 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 29 2001 Scottish Data Zones.



2011 Scottish Data Zones		
	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 30 2011 Scottish Data Zones.

APPENDIX 2: Housing Need and Demand Assessment Diagram