Cairngorms National Park

Local Development Plan 2020

Proposed Local Development Plan

Evidence Paper: Rural Development – Part 3 Economic Development

Contents

1. CONTEXT

The Cairngorms Economic Strategy 2015-2018 sets out the economic priorities for the National Park. Its overall aim is to "Grow the economy of the Park by strengthening existing business sectors, supporting business start-ups and diversification, and increasing the number of workers employed in the Park". Whilst the new Local Development Plan will play a key role in helping to deliver this aim.

Research has identified that the economy of the Park is growing despite the difficult economic climate. This can be used to promote and attract further investment to the area to help diversify and grow key sectors.

2. ECONOMIC ACTIVITY

The National Park has a working age population of approximately 10,909 people (51.9% of the total population) based on 2013 mid-year estimates. Those of pensionable age numbered 4,539 (24.6% of the total population).

According to the Census, of the economically active (66% of the 16+ population) around 95% were classed as being in employment. This is slightly higher than the Scottish level of 91.9%. Of the economically inactive (around 33.9% of the 16+ population), around 65% were inactive due to retirement. This is much higher than the Scottish level. There are two reasons for this. Firstly, the National Park has a higher proportion of those over the age of 55 than the national average, and secondly, owing to the absence of a higher education facility within the National Park, there are relatively few full time students residing within its boundary.

Unemployment levels within the National Park are relatively low, with the Census suggesting that in March 2011 only 3.2% of the population aged 16-74 were unemployed (compared to the Scottish average of 4.8%).

Figure 1: Occupations of the economically active population (Census table KS601SC).

Figure 1 compares the occupations of the economically active population in the Cairngorms National Park with Scotland as a whole. It shows that the National Park has a much smaller proportion of full-time students, whilst a much greater proportion of those who are self-employed in comparison to Scotland as a whole. The higher proportion of self-employment is a typical characteristic of a rural area and reflects the high proportion of independent and smaller businesses within the National Park.

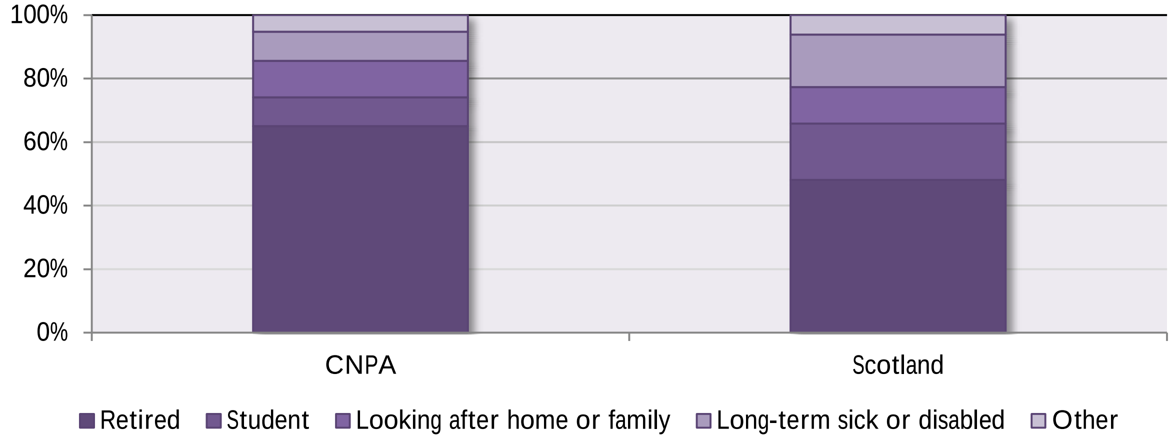


Figure 2: Occupations of the economically inactive population (Census table KS601SC).

Education

Whilst the number of students within the National Park is lower than the Scottish average, educational achievements are higher. In terms of qualifications, 2011 data suggests that 76.8% of the 16+ population in the Park had NVQ1 level and above (in comparison to 73.2% for Scotland as a whole) and 30.8% had NVQ4 and above (compared with the Scottish average of 26.1%).

3. EMPLOYMENT SECTORS

Figure 3 sets out the proportions of the economically active population who work in different sectors. It shows that certain employment sectors are much more significant within the National Park compared with Scotland as a whole.

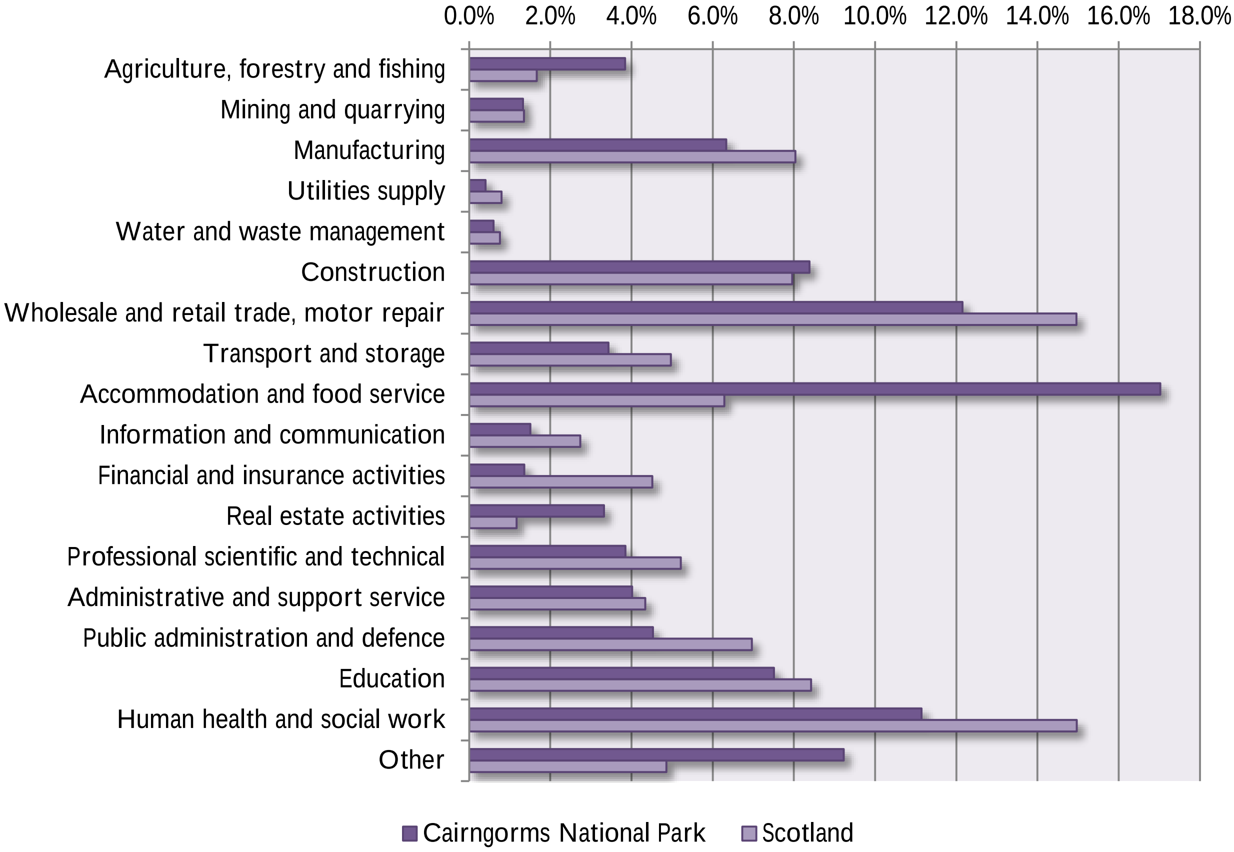


Figure 3: Proportion of all people aged 16 to 74 in employment the week before the census by industry (Census table KS605SC). Crown copyright 2013.

Within the National Park, 17% work in accommodation and food service, compared to just 6.3% of Scotland as a whole. This is largely associated with tourism – providing for visitors staying in the area. The National Park is a popular tourist destination and the provision of accommodation and places to eat and drink are a key component of that.

The National Park also has a strong land based economy which is represented in the higher proportion of people working in agriculture, forestry and fishing related employment (3.8% compared to 1.7% for Scotland).

Understanding the characteristics and key business sectors is important in ensuring that the Local Development Plan’s policies and allocations enable appropriate economic development that supports and enhances local businesses and the National Park’s economy.

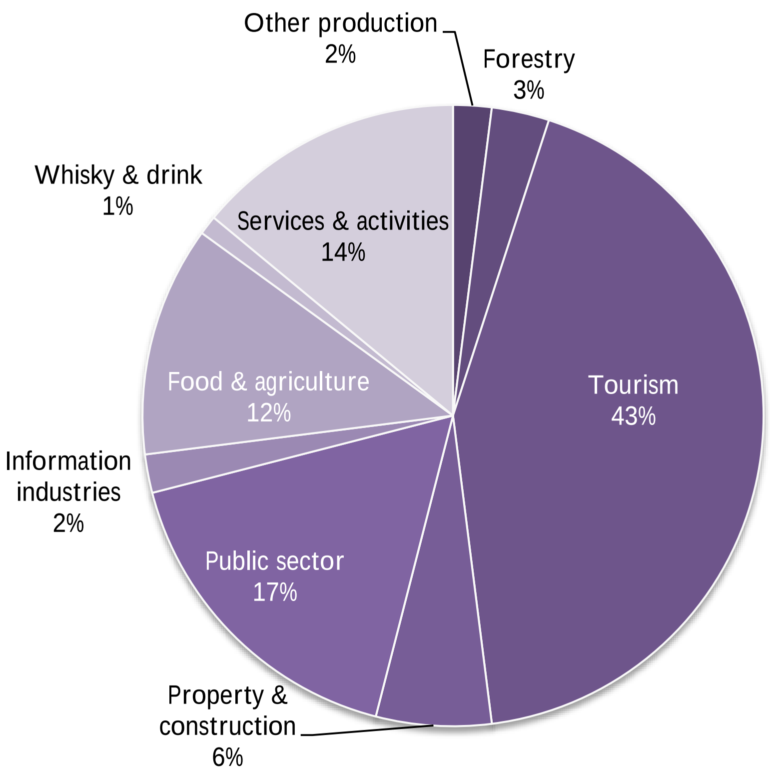


Figure 4 Employment by sector in the National Park

Tourism

As highlighted in Figure 4, tourism is by far the main source of employment in the National Park. This has implications for the Local Development Plan, which will need to include appropriate policies and site allocations to ensure the continued success of this sector. More detail on the implications of tourism for the LDP can be found in the Visitor Experience Evidence Report.

Forestry

The Scottish Government has set targets for woodland expansion which must be achieved alongside a steady increase in the timber harvest over the next 10 years. 20% of the Cairngorms National Park is covered in woodland or forestry and it is a significant industry in the area with a number of related industries e.g. recreation and tourism, logging, joinery, sawmilling, construction etc. Currently 3% of jobs in the National Park are forest-related and this is likely to increase with the National Park Partnership Plan's target to expand woodland cover of 5% (5,000ha) by 2022 within the National Park.

Food and agriculture

The main features of the food and agriculture sector in the National Park are the significance of meat and meat produce – which is shown in the strength of meat processing, meat wholesaling and butchers. Game and game management are also key to this sector, particularly in relation to venison. Food retailers, farming, brewing and distilling are also strong, however, there are opportunities to improve in terms of collaboration, supply chains, and marketing.

4. INCOMES

Due to the low level of unemployment within the National Park, levels of income deprivation are relatively low. However, this masks the fact that there is strong evidence to suggest that average earnings within the National Park are well below the Scottish and British averages (see Strategic Environmental Assessment for more detail on this issue).

According to the 2010 State of the Park Report and 2013 update, annual earnings in the National Park are 26% lower than the Scottish average. In particular, tourism jobs which form the highest proportion of employment are often associated with low wages and are susceptible to seasonal and global trends. With the exception of utilities and distilling, the National Park tends to focus on the lower paying industries, notably the hospitality industries and retailing. Using estimates of employee income industry-by-industry, annual earnings levels per head for National Park residents for 2006 were estimated at significantly lower levels than comparative rural areas in Scotland (see Strategic Environmental Assessment for more detail).

Lower wages combined with house prices in the National Park being around 30% higher than the Scottish National Average (CES, 2015) creates significant housing pressures. Whilst the issue of housing affordability is examined in more detail in the Housing Evidence Report, the lack of affordable housing presents significant issues/challenges for local employers in recruiting and retaining staff.

Therefore, there is a need to support the expansion and diversification of the economy to support new and higher paying employment opportunities. Whilst the Local Development Plan cannot influence employment incomes directly, it can ensure there is sufficient land for a range of businesses and ensure that there is a positive approach to new economic development opportunities.

5. INFRASTRUCTURE

Infrastructure is identified as one of the six key priorities in the Cairngorms Economic Strategy (2015) and is fundamental in delivering the other priorities and supporting a growing economy.

There are currently a number of major infrastructure projects being progressed within the National Park which will impact on the local and wider economy. These include:

A9 Dualling and rail improvements

The dualling of the A9 is a significant strategic infrastructure project. The proposal involves the dualling of 80 miles of single carriageway along the A9 between Perth and Inverness – of which 60 miles run through the National Park – by 2025.

The dualling has been designed to deliver economic growth through improvements to road safety and journey times as well as better links to pedestrian, cycling and public transport facilities. Overall it has the potential to benefit the economy of the National Park by improving accessibility for businesses and communities in the area.

Highlands and Islands Enterprise (HIE) are currently working with CNPA and other key partners including Scottish Government, Transport Scotland, Perth and Kinross Council, The Highland Council, and Visit Scotland to develop a strategy to ensure that the economic development potential of the dualled A9 is maximised.

Proposals to upgrade the Highland Main Line are also currently being prepared to improve rail connections between the north of Scotland and the central belt. The long-term goal of this project is to improve journey times and the frequency of services by end of 2019.

The National Park Partnership Plan identifies a key action of 'Maximising the opportunities for businesses, communities and visitors from the A9 dualling project' (page 70). The Local Development Plan cannot directly influence the delivery of the A9 dualling. However, it could help to take advantage of the new opportunities for inward investment that the project may bring. This could involve ensuring there is sufficient economic development land in appropriate locations that can benefit from their proximity to the A9.

However, there may also be threats associated with these proposals. Increasing accessibility to the National Park from larger areas of population has the potential to increase commuting as well as demand for second or holiday homes in parts of the National Park. These factors could impact on community vitality and vibrancy, as well as the affordability of housing. Conversely, some areas may become less accessible as the new A9 dual carriageway is likely to have fewer junctions than the current single carriageway, and trains might not stop as often in some locations in the future. There is also a risk that some communities may become effectively more 'by-passed' by the new A9 arrangements, with the possibility of fewer visitors diverting off the main road to make use of local facilities and amenities. The Local Development Plan should also play a role in supporting the vitality and vibrancy of these communities where possible.

Digital infrastructure and connectivity

The importance of digital infrastructure is increasingly acknowledged, with both our economy and our social networks depending heavily on the existence of high-quality digital connectivity. However, the limited access to high speed broadband and mobile communications services presents a challenge in some parts of the National Park. Although the availability of high speed broadband has improved substantially in many of the greater populated areas, there are still parts of the Park with poor or no access.

The National Park Partnership Plan sets out a priority action to support the delivery of superfast broadband to the hardest to reach parts of the Park, and the Cairngorms Community Broadband project has been working to help address this.

The Scottish Government has also recently launched the *Reaching 100% Programme* ('R100') to extend 'new generation access' broadband infrastructure to meet their commitment of delivering superfast broadband to 100% of premises in Scotland by 2021(Scottish Government, 2017).

It is therefore important to consider what role the Local Development Plan can play in helping to strengthen digital communications capacity and coverage across the National Park. The existing Local Development Plan currently contains a policy on the siting and design of digital communications equipment. This policy outlines the criteria that will be used to determine planning application for communications equipment and it will be important that a similar policy is retained in the new plan. The new Local Development Plan could also set out policies to encourage developers to provide digital infrastructure or high speed broadband connections to new homes and business premises. However, given the Government's commitment to extend superfast broadband through the R100 programme, it is unlikely that this would be necessary.

6. ECONOMIC DEVELOPMENT LAND

The Local Development Plan supports the delivery of economic development through its economic development policy, but also through the allocation of employment or economic development sites. Ensuring there are sufficient employment sites to meet demand and support sustainable economic growth is a requirement of the Scottish Planning Policy. The National Park Partnership Plan (2017-2022) also reinforces that the Local Development Plan should be used 'to identify new sites for business use and expansion and …to target investment that opens those sites to business' (page 70).

The current Local Development Plan contains economic development and tourism allocations with the purpose of protecting existing operations and to encourage new development in particular areas. The Action Plan update (2017) states that currently there is a total employment land supply (comprising economic development and tourism sites) of 140.4 Ha (see extract at **Appendix 1**). However, the majority of these sites are already developed. The available supply of undeveloped sites for new economic development is around 24 Ha.

A Study was undertaken to establish the need and demand for commercial development land within the National Park by Ryden in 2011[1]. Whilst the Study was undertaken some time ago, its findings and general conclusions are still considered relevant.

The Study concluded that it is difficult to accurately determine demand from employers that might consider locating within the Park if suitable business land was available. However, it highlighted that 'there is a commonly held view that there is demand particularly for small start-up business accommodation that can be used as office or light industrial accommodation' (2011). It added that an increasing working population and growing number of small businesses (evident from the higher proportion of self-employed in the National Park) is likely to generate increasing demand for small flexible business accommodation. This is mirrored within the Cairngorms Economic Strategy (2015) which highlights that due to 'the high proportion of small businesses there is also demand for business units and sites which meets the needs of small businesses' (page 13). Anecdotal evidence suggests this continues to be the case and there is a need to ensure there is sufficient employment land for both small and large scale businesses.

The 2011 study recommended that economic development could best be supported through the allocation of some larger sites in more strategic settlements, more limited allocations within intermediate settlements and an appropriate and supportive planning policy for proposals in smaller settlements. It is considered that a supportive and flexible policy approach is the most suitable way for supporting and delivering small scale business units.

Although it presented little empirical information on which to base land requirements, the study suggested that there may be a case to allocate commercial and industrial sites close to good transport links and centres of population to promote inward investment. The dualling of the A9 will result in strategically important infrastructure that has the potential to enhance business development opportunities along the route, which will benefit from improved accessibility and connectivity. The Local Development Plan should utilise opportunities to allocate appropriate additional employment land, particularly where it can benefit from being in close proximity to the A9 or focused in centres of population.

In addition to identifying new economic development sites, it is also important that the existing employment land supply is protected. Many of the economic development and tourism sites are in productive use however, continuing to allocate these will be important to ensure the sites are protected for economic use in the longer term.

[1] Submission to Cairngorms National Park Authority on Development Land for Commercial and Industrial Use, Ryden LLP (April, 2011)

In addition, as set out in the Visitor Infrastructure Evidence paper, it will be important to identify and protect strategic development sites both for tourism and economic development.

7. TOWN CENTRES

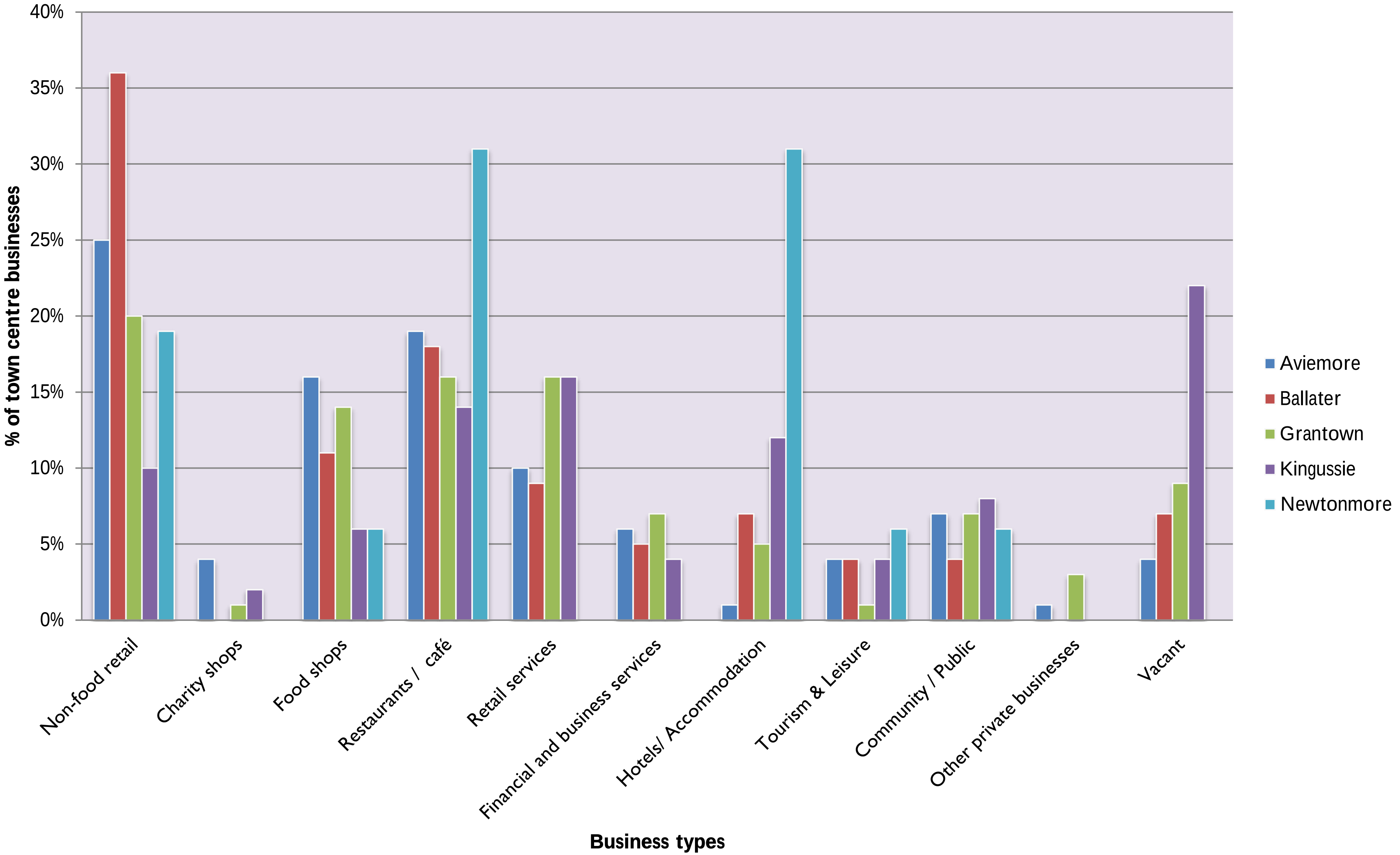
Town Centres are an important hub of economic activity and the Local Development Plan plays a key role in guiding development in these areas. Characteristic of a rural area, the National Park has a number of smaller centres within its towns and villages.
Town Centre Health Checks were undertaken every one to two years within the National Park from 2010 to 2015. In 2016, following the completion of a pilot project in Grantown-on-Spey to put into practice the Scottish Government's Town Centre Masterplanning Toolkit, the Health Check methodology was reviewed. This aimed to provide a more in-depth approach for assessing the vitality and viability of the National Park's town centres and the Health Checks now include more information that can be used to monitor change and performance. Health Checks were undertaken in all settlements with an identified 'village core' (in the current Local Development Plan) which were Aviemore, Ballater, Braemar, Grantown-on-Spey, Kingussie, Newtonmore and Tomintoul.

Health Checks were undertaken again using the revised methodology in 2018 for the five strategic settlements in the National Park. This provided some data which can be compared with the 2016 results and have played a part in helping to identify settlement priorities and town centre boundaries. Figure 6 sets out the types of businesses contained within each strategic settlement town centre. It is difficult to directly compare town and village centres due to their varying natures and scales, however further detail about their characteristics are contained in the Town Centre Health Check Report (2018) which is attached in **Appendix 2**.

Given the rural nature of the National Park, settlements are smaller and therefore it is not considered necessary to identify town or village centre boundaries in all of the settlements that currently have them. In these cases, the sequential approach could apply within the settlement boundary. However, it is important that town centre boundaries are identified in strategic settlements such as Aviemore to ensure that retail development and other appropriate business uses are focused within the appropriate locations.

Scottish Planning Policy sets out that planning in town centres should be 'flexible and proactive, enabling a wide range of uses' (Para. 60). Part of this includes the application of a sequential town centre first policy approach for high footfall generating uses including retail, commercial, leisure, offices, community and cultural facilities. The approach seeks to support a wider range of businesses and uses within town centres which can enhance the vitality and viability of settlements and the Local Development Plan should seek to reflect this where appropriate.

Figure 6: % of business types within each town centre in the National Park as at July 2018.



8. KEY ISSUES / IMPLICATIONS FOR THE LOCAL DEVELOPMENT PLAN

Protection of strategically important tourism and economic sites

There are a number of strategically important tourism and economic sites within the National Park as well as some major projects and initiatives that are in progress or proposed. These will be central in sustaining and enhancing the local economy within the National Park as well as improving visitor infrastructure. There is a need to ensure that the Local Development Plan contains appropriate and supportive policy principles for tourism related development as well as identifying key sites and attractions within settlement statements.

Infrastructure

The dualling of the A9 is a major project affecting the National Park and has the potential to provide both significant benefits as well as potential threats. The Local Development Plan should seek to identify settlements that may be affected along the route and seek to maximise the benefits by identifying economic development land in close proximity to the A9 and centres of population.

Employment land

The Local Development Plan needs to ensure the continued protection of existing economic development and tourism sites as well as identifying opportunities for a limited amount of new land. As set out, there is a much higher proportion of self-employed people within the National Park in comparison to Scotland as a whole and there continues to be anecdotal evidence identifying a need for small scale business units. The Local Development Plan should seek to include supportive policy criteria for small scale business development to help meet this need.

Town Centres

The scale of towns and villages within the National Park vary and it is considered that the retail development policy approach should be reviewed to ensure a proportionate and appropriate approach is taken for settlement within the National Park. It is not considered that town centres should only be identified in strategic settlements. In addition, the retail approach should be broadened to include other high footfall generating businesses.

9. REFERENCES

- Scottish Government, 2017. Digital Scotland – Reaching 100% Programme Consultation Document
- Cairngorms National Park Economic Strategy
- Cairngorms National Park Partnership Plan (2017 – 2022)
- Scottish Planning Policy 2014
- STEAM data 2017

APPENDIX 1	Site	Type of Development	Current use / status	Total Area (Ha)	Available supply – Estimated (Ha)	Progress
Aberdeenshire						
Ballater	ED1: Ballater Business Park	Economic	In operation / existing use	**0.6**	**0**	
	T1: Caravan Park	Tourism	In operation / existing use	**2.8**	**0**	
Braemar	ED1: The Ambulance Station	Economic		**0.1**	**0.1**	Comprises 2 sites.
	ED2: The Mews	Economic	In operation / existing use	**0.3**	**0**	
	T1: Caravan Park	Tourism	In operation / existing use	**4.8**	**0**	
TOTAL				**8.6**	**0.1**	
Highland						
An Camas Mor	EP: An Camas Mor	Mixed use development	Undeveloped – proposal is for a new settlement which will include a proportion of employment land.			Level of employment land to be determined.
Aviemore	ED1: Dalfaber Industrial Estate	Economic	Existing use as industrial estate	**5.9**	**0.5**	
	ED2: South of Dalfaber Industrial Estate	Economic	Site currently vacant	**3.5**	**3.5**	Site identified as preferred option for new hospital.
	ED3: Myrtlefield Industrial Estate	Economic	In operation / existing use	**1.2**	**0**	
	ED4: Supermarket Site	Economic	In operation as Tesco store	**0.5**	**0**	
	EP8: Aviemore Highland Resort	Economic	In operation / existing use	**24**	**3.53**	A development brief for the site was adopted in April 2018.

APPENDIX 1	Site	Type of Development	Current use / status	Total Area (Ha)	Available supply – Estimated (Ha)	Progress
Boat of Garten	ED1: Steam Railway Station	Economic	In operation / existing use	**2.7**	**0**	
	T1: Caravan Park	Tourism	In operation / existing use	**2.3**	**0**	
Carr-bridge	ED1: Land at Railway Station	Economic		**2.2**	**2.2**	
	ED2: Garage	Economic	In operation / existing use	**0.3**	**0**	
	T1: Landmark	Tourism	In operation / existing use	**12.6**	**0**	
Cromdale	ED1: The Smoke House	Economic		**0.3**	**0**	
Dalwhinnie	ED1: Garage	Economic	In operation / existing use	**0.3**	**0.1**	
Dulnain Bridge	ED1: Garage	Economic	In operation / existing use	**0.1**	**0**	
Glenmore	T1: The Camp Site	Tourism	In operation/ existing use	**10.4**	**0**	CNPA now working with two delivery groups to specifically improve public access and visitor experience as outlined in the strategy.
	T2: Glenmore Lodge	Tourism	In operation / existing use. Cairngorm and Glenmore Strategy was approved in September 2016.	**6.4**	**0**	
Grantown-on-Spey	ED1: Woodlands Industrial Estate	Economic	In operation / existing use	**7.4**	**1.9**	
	T1: Caravan Park	Tourism	In operation / existing use	**8.6**	**0**	

APPENDIX 1	Site	Type of Development	Current use / status	Total Area (Ha)	Available supply – Estimated (Ha)	Progress
Inverdruie & Coylumbridge	T1: Caravan Park	Tourism	Existing Use on part of site	**1.2**	**0**	
Kincraig	ED1: Baldow Smiddy	Economic	In operation / existing use	**0.3**	**0**	
Kingussie	ED1: West of Spey Street	Economic		**1.4**	**0.3**	
	ED2: Council Depot	Economic	In operation / existing use	**0.9**	**0**	
	ED3: McCormack's Garage	Economic	In operation / existing use	**0.1**	**0**	
	T1: Caravan Park	Tourism	In operation / existing use	**2.7**	**0**	
	EP1: Land between Ardbroilach Rd and Craig an Darach	Mixed use – including small proportion of employment land.	Planning permission in principle approved for whole site.	**2.2**	**2.2**	2.15Ha is approximate area of employment land which forms part of larger site (Approx18.5 Ha).
Newtonmore	ED1: Rear of Cafe	Economic		**1.3**	**0.7**	
	ED2: Industrial Park	Economic	In operation / existing use	**4**	**1.1**	
TOTAL				**102.8**	**16**	
Moray						
Tomintoul	ED1: Garage to north	Economic	In operation / existing use	**0.7**	**0**	
	ED2/3: By A939	Economic	Part of site in use	**2.5**	**0.7**	
	T1: Tomintoul	Tourism		**1.6**	**1.4**	
TOTAL				**4.8**	**1.1**	

APPENDIX 1	Site	Type of Development	Current use / status	Total Area (Ha)	Available supply – Estimated (Ha)	Progress
Perth & Kinross						
Blair Atholl	ED1: Blair Atholl Business site	Economic	In operation / existing use	**3.5**	**0**	
	T1: Caravan Park	Tourism	In operation / existing use	**12.4**	**0**	
	EP1: Adjacent to Blair Atholl Hotel	Economic	In operation / existing use	**0.2**	**0**	
	EP2: Ranger Base	Tourism	In operation / existing use	**0.4**	**0.1**	
	EP3: Caravan Park	Tourism	Extension to Caravan Park	**1.8**	**3.2**	
TOTAL				**18.3**	**3.3**	

Total Employment Land Area (Ha)	Available Supply Estimated (Ha)
134.5	**20.5**

APPENDIX 2

Town Centre Health Check Report 2018

Cairngorms National Park Authority

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1. BACKGROUND

Town Centre Health Checks (TCHCs) have been undertaken in the Cairngorms National Park's main settlements every 1-2 years since 2010. They help to provide a picture of town centre vitality and viability and monitor town centre change.

Since the previous TCHCs were undertaken in 2014, there has been an increased national focus on town centres. Scottish Planning Policy (SPP, 2014) acknowledges that 'Town centres are at the heart of… communities and can be hubs for a range of activities' (Para 58). It adds that the purpose of Town Centre Health Checks' are to 'assess a town centre's strengths, vitality and viability, weaknesses and resilience' (Para. 64).

With an increased focus on the role of town centres and town centre health checks, SPP introduced a wider set of indicators that provide a more comprehensive picture of town centre vitality. Many of these are further explored in the Town Centre Toolkit (Scottish Government, 2015) which provides a wealth of guidance for improving town centres.

CNPA took part in piloting the Town Centre Toolkit by undertaking a Town Centre project in Grantown-on-Spey. As part of the Pilot, a review of the existing TCHC methodology was undertaken to better reflect the indicators set out in Scottish Planning Policy (2014). This included gathering quantitative data on retailer representation, vacancy rates and pedestrian footfall along with qualitative observations on the town centre's physical structure, sense of place, historic environment, public realm and accessibility (including pedestrian movement and ease of navigation).

The TCHC methodology now provides a more in-depth approach to assessing the vitality and viability of the National Park's town centres and includes more information that can be used to monitor change and performance. SPP states that health checks should be undertaken preferably every 2 years and this report forms the first review using the revised methodology following its implementation in 2016.

The previous report set out the findings of Town Centre Health Checks undertaken in the five strategic settlements in the National Park: **Aviemore, Ballater, Grantown-on-Spey, Kingussie** and **Newtonmore**.

In addition, Braemar and Tomintoul were included for the first time to reflect the settlements that have village cores identified in the Local Development Plan 2015. However, due to the small scale of these settlements, the Health Checks carried out in 2016 did not provide sufficient information that could be used to accurately reflect or compare year on year the vitality and viability of Braemar and Tomintoul. These settlements have therefore not been included in the 2018 review.

2. METHODOLOGY

The methodology for undertaking Town Centre Health Checks was reviewed and updated in 2016. This aimed to obtain a better understanding of each town centre's vitality and viability by incorporating indicators set out in SPP (2014) and the Town Centre Toolkit (2015). The 2016 health checks provided a new baseline against which future health checks will be monitored and compared.

Undertaking regular TCHCs can help to identify changes within each settlement and for comparison against previous years. As each settlement has very different characteristics, the TCHCs are not intended to be used as a basis for comparing settlements against each other.

The process for carrying out the town centre health checks involves 3 main aspects:

- **Pedestrian count**
- **Inventory of town centre businesses**
- **Assessment of town centre characteristics and activity**

2.1 Pedestrian Counts

Pedestrian counts are undertaken at two points within each town centre recording two way movements. The aim of this is to ascertain the level of pedestrian activity at different locations and different times within each town centre. Pedestrians are counted at each 'point' for 5 minutes at 11am; 12pm and 1pm.

2.2 Inventory of town centre businesses

The type and location of each business within or close to the edge of each defined town/village core is recorded to build our understanding of the business and retailer representation within each town's centre.

Businesses were divided into 11 different categories[1]:

- **Non-food retail**
- **Charity shops**
- **Food shops** e.g. Co-op, Butcher, Deli, Bakery etc
- **Restaurants, bars, cafes and hot food takeaway**
- **Retail services** e.g. Post Office, hair dresser, photo shop, dry cleaning, garage
- **Financial and business services** e.g. property services, accountant, solicitor, bank etc
- **Hotels and accommodation**
- **Tourism and leisure**
- **Community/public** e.g. local authority office, community centre.
- **Other private businesses**
- **Vacant**

[1] Some businesses/ shops comprised more than one category – in these circumstances, the dominant type has been used in the calculations.

The composition of local businesses can be an important indicator of town centre vitality. Higher than average levels of vacant premises can indicate that there is lower demand in a town centre and poorer town centre health where as a more varied mix of businesses and low vacancy rates can indicate a more thriving town centre.

Monitoring the types of town centre businesses, levels of change and vacancy rates over time will help to understand key trends and identify any issues that are affecting the vitality of particular town centres.

2.3 Health Check indicators

In addition to the qualitative data gathering of pedestrian counts and recording business types, quantitative information is gathered about different aspects of the physical environment and accessibility of each town centre. These are observations made by officers about how they experienced the town centres, and what they felt are their strengths, weaknesses and opportunities for improvement.

Observations for each town centre were based on the following indicators:

Physical environment

- Appearance, condition and physical structure of the town centre (including any constraints, opportunities and assets)
- Condition of the historic environment and assets, considering their contribution to the town centre's structure and noting any that enhance the town centre.
- Evidence of investment by users – noting any recent or ongoing improvements to the built environment that could benefit the town centre.
- Sense of place - What is distinctive about the town centre and whether it has a sense of local identity

Public Spaces / Realm

The Health Checks also consider how public spaces within each town centre are used, how they interact with the wider town centre and what opportunities may exist to improve them in a way that can benefit of the whole town centre.

> **'Squares may often be historic market places, particularly in rural contexts, that now act as gathering places for local events. It is important to critically appraise how well a town square supports the variety of uses that it is expected to support'.**
>
> **Town Centres Toolkit, Page 19**

The Health Checks also include observations about town centre High Streets, considering how people used them and what made them pleasant spaces or not.

Accessibility

Ease of movement is fundamental in encouraging footfall. The perception that a town is easy to navigate and walk around will affect how people use it and how often. When carrying out the Health Checks, accessibility of the town centre is appraised by examining how easy it is to move around and for example if there are suitable crossing places.

> **'Most Scottish towns have a main or High Street which acts as a central spine for footfall and activity. Towns can develop in various ways around their High Streets, and not always to the benefit of pedestrians, so it is important that their success as an active and bustling thoroughfare for people on foot is continually appraised'**
>
> **Town Centres Toolkit, Page 19**

In addition, the impact of traffic, availability and suitability of parking, cycling facilities and public transport are also examined through the Health Checks to help understand the wider aspect of *Accessibility*. This includes observing the impact of traffic on the town centres, noting what provision there is for cyclists and what level of public transport is available.

2.4 SWOT Analysis

A SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis is undertaking for each town centre and is included in the analysis below. It broadly notes the good and not so good things in the town centre as well as any things that could be improved and any known threats to the town centre.

The SWOT analysis considered the following questions:

- What are the best parts of the town?
- Where do people like to go?
- Is there anything that lets the town centre down? Why?

3 FINDINGS

The following chapter sets out the key findings from the Town Centre Health Checks for each town centre. The following summaries outline the composition of businesses in each town centre, qualitative observations, a SWOT analysis and map showing the spatial distribution of businesses.

Please refer to the key below for the maps for each town centre:

- Non-food retail
- Charity shops
- Food / grocery shop
- Restaurant, café, pub
- Retail services
- Financial and business services
- Hotels and accommodation
- Tourism and leisure
- Public and community uses
- Other businesses
- Vacant

3.1 AVIEMORE

Aviemore is the biggest town in the National Park with a population of over 3,000[2]. It has experienced significant growth over the last decade and continues to be a popular destination for visitors due to its proximity to the Cairngorms and reputation as an outdoor activity hub.

The business composition chart (Fig.1) shows that the town centre has a range of business types, with non-food retail forming the highest proportion at 25%. Aviemore has the lowest level of vacant business and retail premises which is just 4%.

Key Changes

There have been no significant changes in the composition of town centre businesses in Aviemore. Whilst the total number of businesses in the town centre has increased reflecting the new retail park, the types of business remain relatively stable. There is a notable change in the proportion of Hotels / Accommodation from 5% in 2016 to 2% in 2018. This is not due to a reduction in accommodation but to more accurately reflect accommodation within the town centre boundary as the 2016 survey also included parts of Aviemore Highland Resort which lies just outwith.

In terms of retailer representation, Aviemore contains the highest proportion of chain retail in comparison to other town centres (60% of all non-food retail, charity and food shops) with only 30% independent retailers.

Figure 1: Composition of town centre businesses

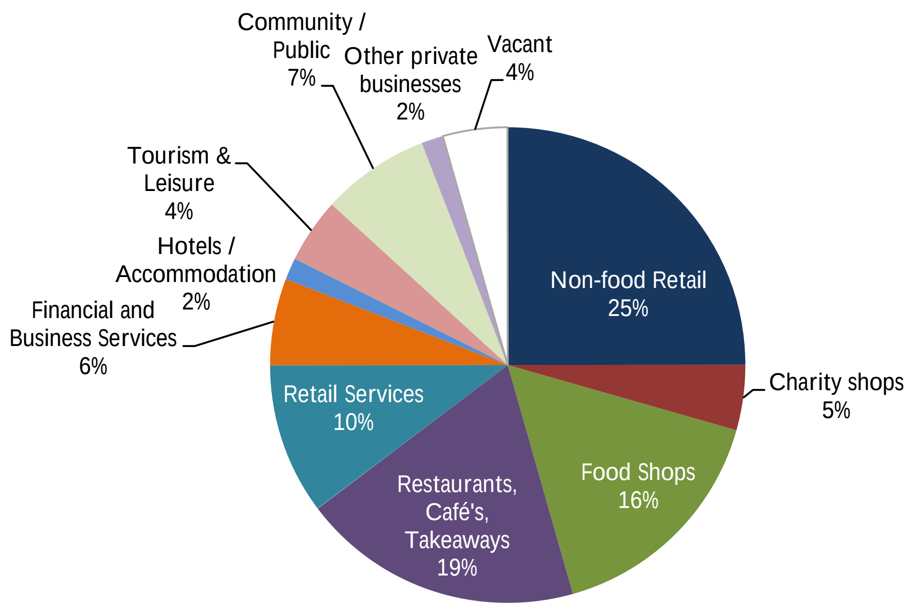
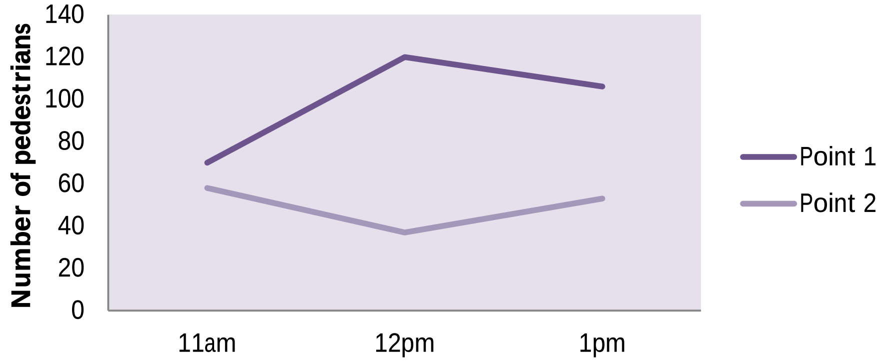


Figure 2: Pedestrian count



[2] Understanding Scottish Places, http://www.usp.scot/

Aviemore produced the highest pedestrian counts (Fig. 2) of all the town centres demonstrating a strong and thriving town centre. In addition, the numbers of pedestrians have increased peaking at 120 over the 5 minute period compared to just over 70 in 2016.

Physical Environment

Aviemore is relatively unique in the wider local and national context. It is characterised by its landscape setting and contains a range of architectural styles and building types including traditional vernacular as well as a range of modern buildings. The main thoroughfare is Grampian Road which comprises a variety of retail outlets from very small units to a large supermarket.

The town centre is largely well maintained. It contains various street furniture and extensive planting and areas of green open space providing linkages to businesses, residential areas and paths.

The town centre continues to thrive, and has been enhanced by the development of a large retail park increasing retail provision. There continues to be demand for premises in Aviemore with very low numbers of vacant properties.

Accessibility

The town centre is largely based along Grampian Road making it easy to navigate. The town centre encounters a steady flow of traffic which can affect the enjoyment. Previously there are two pedestrian crossings in the southern half of the town centre which created greater difficulty crossing in the northern part. However, as a result of the new retail park, an additional crossing has been created. There is a lot of different signage – different colours, fonts and styles which can be confusing.

There is largely good provision of parking available – mostly off street however some of it appears ad-hoc roadside parking particularly in the town centre.

There is cycle parking in the town centre and good connectivity to surrounding routes and public paths. Aviemore is well served for public transport with bus and rail services north and south to Inverness and Edinburgh/Glasgow. Bus and rail services are co-located making travel through the town relatively easy.

There is also the tourist steam railway running between Aviemore and Broomhill and local bus services to Grantown-on-Spey.

SWOT Analysis

Overall, the Town Centre Health Check identified the following:

STRENGTHS

- Outstanding environment
- Busy centre
- Well known and popular
- Lots of shops
- Very low vacancy rates
- Excellent public transport
- Good green infrastructure
- Wide pavements and good cycle and parking provision
- The new retail park has improved the vitality of the town centre and has extended the extent of the core area of the town centre

WEAKNESSES

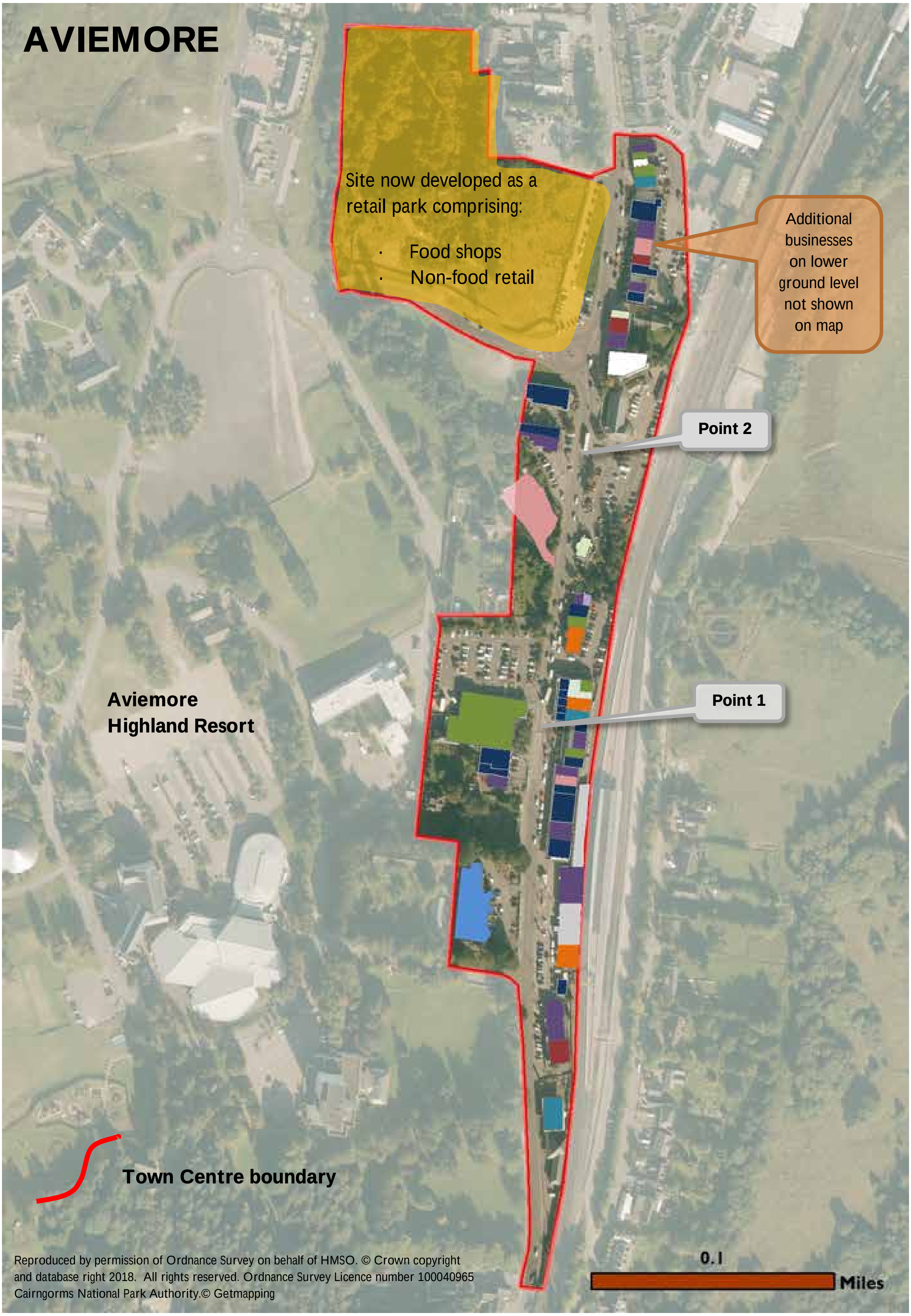
- Incoherent and cluttered streets – lots of street furniture and different signs
- Limited opportunity for future development on High Street
- Somewhat seasonal nature of tourism in the town

OPPORTUNITIES

- Work on-going to look at developing the Aviemore Highland Resort site
- Capitalise on the environment and the town role as an outdoor capital
- New hospital and associated Active Aviemore project to improve active travel through the town centre
- Promote cultural identity

THREATS

- Climate change – reducing number of snowy days
- High house prices
- Level of second homes increasing pressure


AVIEMORE
Site now developed as a retail park comprising:
· Food shops
· Non-food retail
Additional businesses on lower ground level not shown on map
Point 2
Point 1
Aviemore Highland Resort
Town Centre boundary
0.1
Miles

3.2 BALLATER

Ballater sits in Deeside in the eastern part of the National Park and has a population of just over 1,500[3]. The town has strong royal connections due to its proximity to Balmoral and has an attractive historical centre. The town experienced extensive flooding in the winter of 2015 and whilst work is still ongoing in the town centre to reinstate businesses, the majority are back up and running.

The composition of businesses within the town centre is shown in Figure 3. Overall, the town centre has a good range of business types, with non-food retail forming the highest proportion (36%) and Restaurants/ Cafes (18%), Food shops (11%) and Retail services (9%) forming the other most significant proportions.

Key changes

The most significant change in Ballater is the reduction in vacant premises. In 2016, this was 22% following the significant flooding in late 2015 and many premises were still closed undergoing refurbishment. In 2018, this figure has reduced to just 7% which is a significant improvement. In addition, Ballater Station has now re-opened following a fire and the town centre is more vibrant.

In terms of retailer representation, Ballater has the highest proportion of independent retail accounting for 83% of shops in the town centre (based on non-food retail, charity and food shops).

The pedestrian counts (Fig. 4) demonstrate a strong footfall, with most counts achieving higher numbers than in 2016. This suggests increased activity and a thriving town centre.

Figure 3: Composition of town centre businesses

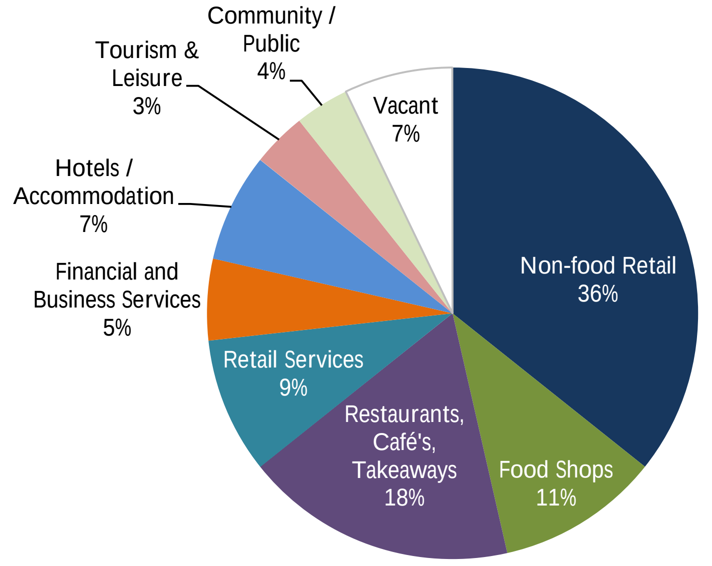
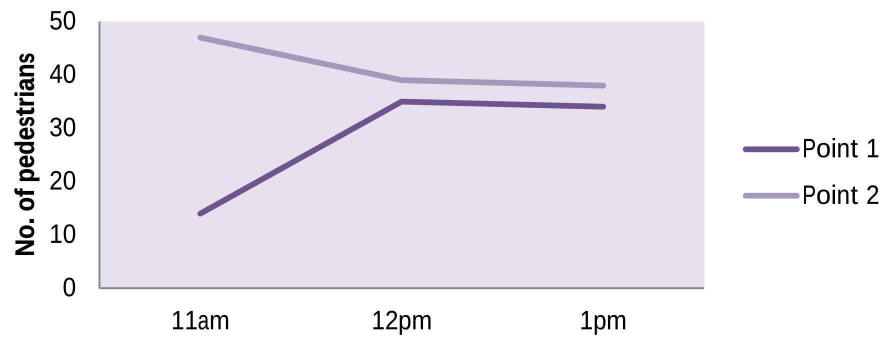


Figure 4: Pedestrian count



3 Understanding Scottish Places, http://www.usp.scot/

Physical Environment

The quality of the town's built environment is very high – there is a strong sense of historic environment with the Church in the central square and a strong historic/royal identity with the Royal Deeside brand a key selling point.

Following the floods of 2015, the physical environment appears to be in very good condition. As highlighted, the majority of businesses are now back in operation following the flooding and Ballater Station which is a landmark attraction in the town has also recently re-opened following a fire.

Accessibility

The town centre has a traditional grid iron pattern centred round the Square and is easy to navigate. The pavements are well maintained with dropped curbs suitable for those with limited mobility. Following the rebuilding of Ballater Station, the public realm in this area has been signficiant improved, making the area more pedestrian friendly.

There is good parking provision within the town centre (with one large car park in the Square. Bus services are available to Braemar and Aberdeen. There are also 2 bike shops within the town centre which provide bike facilities including parking. On the TCHC visit, there were a lot of cyclists around and the town appears to be cycle friendly, possibly due to there not being very heavy traffic.

SWOT Analysis

Overall, the Town Centre Health Check identified the following:

STRENGTHS	WEAKNESSES
· Strong Historic / Royal Identity · Re-developed Ballater Station to be re-opened providing a key visitor attraction in the town · Good range of independent shops · Attractive town centre environment with well-maintained greenspaces and planting · Accessible for pedestrians, cyclists and motorists	· Lack of affordable housing to support greater economic activity · Ageing population may over the longer term impact the range of town centre businesses
OPPORTUNITIES	**THREATS**
· Re-opening of Ballater Station · Strengthening the role of tourism - There could be further opportunities to enhance visitor experience and a wider range of tourism accommodation · With two bike shops, the town is becoming a destination for the sport. Building on this will encourage visitors and businesses associated with this sport	· The flooding in 2015 had a significant impact on the town and whilst it has recovered brilliantly, anything like this again would be detrimental to the town centre vitality


BALLATER
Town Centre boundary
Ballater Station
Point 1
Point 2
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0.1
Miles

3.3 GRANTOWN-ON-SPEY

Grantown-on-Spey lies in the north of the Cairngorms National Park and is one of the main service centres in Badenoch and Strathspey with a population of just over 2,400[4]. Grantown has a traditional (and typical of Badenoch and Strathspey) long High Street and central square which forms the hub of the town.

The business composition chart (Fig. 5) shows that Grantown has a range of retail and business types with non-food retail forming the greatest proportion (20%). This is closely followed by retail services (16%), restaurants / café's (16%) and food shops (14%).

Key Changes

There have been no significant changes in the composition of businesses in Grantown. Whilst there have been 10 new businesses, these have largely comprised taking over existing premises for similar uses and not resulted in any significant changes in the town centre. There has been a small increase in the number of vacant premises; however progress is underway to redevelop the Strathspey Hotel and two adjoining shop properties which have been vacant for a number of years which will benefit the town centre.

Like many towns in the National Park, Grantown has a strong presence of independent retailers which account for 72% of town centre retail (based on non-food retail, charity and food shops).

Pedestrian counts in Grantown have also remained stable since the 2016 counts suggesting the town centre continues to thrive.

[4] Understanding Scottish Places, http://www.usp.scot/

Figure 5: Composition of town centre businesses

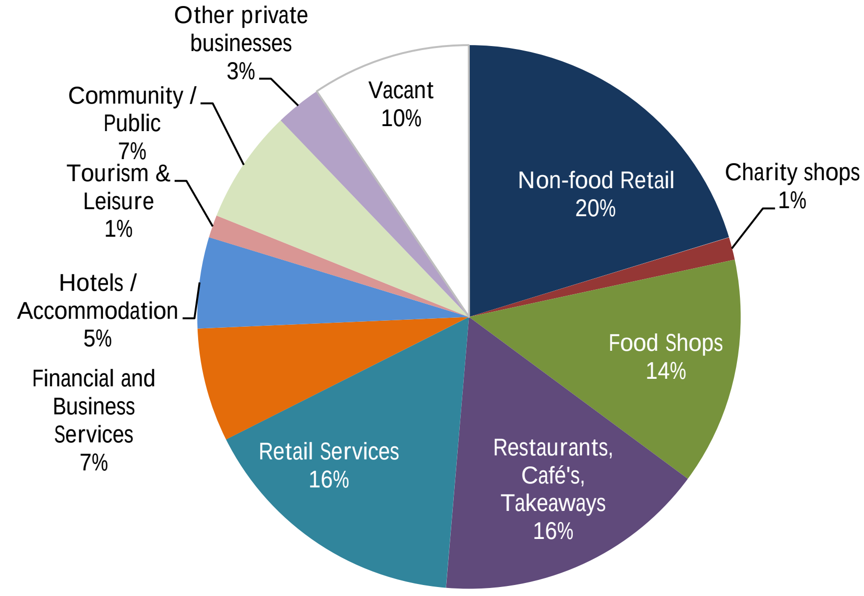
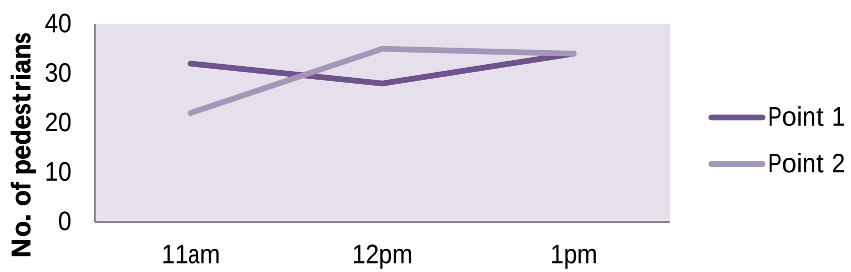


Figure 6: Pedestrian Count



Physical Environment

Grantown has a strong historic identity being one of Scotland's first planned towns and has a conservation area. However, the conservation area has not been actively regulated in planning terms which has affected the quality of the historic environment in some parts of the town centre. However, the town centre is generally well maintained, attractive and provides a high quality built environment.

The physical structure of town centre buildings largely appear to in reasonable condition, with a small number of the High Street premises showing some wear and tear. There are a range of shop fronts and sizes on the High Street however a high number have retained traditional shop front styles, particularly the smaller premises. Work is also underway on a couple of properties on the High Street which will bring currently vacant properties back into use and improve the condition and quality of the town centre.

Accessibility

The town centre comprises a long High Street and Square making it easy to navigate. There are good proportioned pavements and two pedestrian crossings (with traffic lights) on the High Street which both have dropped kerbs. Due to the traffic at times, it can be difficult to cross the High Street and Square.

The town centre can encounter considerable traffic which leads to congestion. There is on-road parking along the high street and in the square – however there appear to be parking problems in some areas. There is cycle parking however public transport is somewhat limited.

SWOT Analysis

Overall, the Town Centre Health Check identified the following:

STRENGTHS	**WEAKNESSES**
· High number of independent specialist shops · Distinct sense of place · Attractive green spaces · Built heritage · Easy to navigate · Outstanding surroundings e.g. proximity to Anagach and accessible outdoors with a good path network · Strong cultural identity · Strong sense of community input and activity (events/empty shop windows)	· Lack of formal tourist attractions · Increased number of vacant premises · Condition of some units on High Street
OPPORTUNITIES	**THREATS**
· Selling as an outdoor destination · Tourism · Railway extension	· Macro scale economic changes which affect local businesses (small changes or a poor season can affect the viability of a business) · Parking / traffic – No enforcement and level of traffic affecting · Deterioration and maintenance of older buildings in the town centre.


GRANTOWN-ON-SPEY
Town Centre boundary
Point 1
Point 2
0.1
Miles
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3.4 KINGUSSIE

Kingussie is the oldest settlement in Badenoch and is a traditional Highland town with a population of nearly 1,500[5]. It is a popular destination for visitors with a number of attractions nearby. The town centre is focused along a long traditional high street typical of the area.

The business composition chart (Fig. 7) shows that there are a range of businesses in Kingussie. Unlike many other settlements, Retail services form the greatest proportion of businesses (17%), closely followed by restaurants / café's (14%) and Hotels/Accommodation (12%).

Key changes

The biggest change in Kingussie is the increase in vacant premises. This now forms the greatest proportion of town centre units at 23%, up from 13% in 2016. It is unclear why this is, and there have been improvements and new businesses in the town centre such as the Highland Council's Courthouse office and new art gallery.

Kingussie maintains a strong presence of independent retailers which account for 75% of town centre retail (based on non-food retail, charity and food shops).

The pedestrian counts (Fig. 8) were largely consistent with 2016 suggesting the levels of pedestrians have not declined, despite the reduction in town centre businesses. Consistent with 2016, Point 2

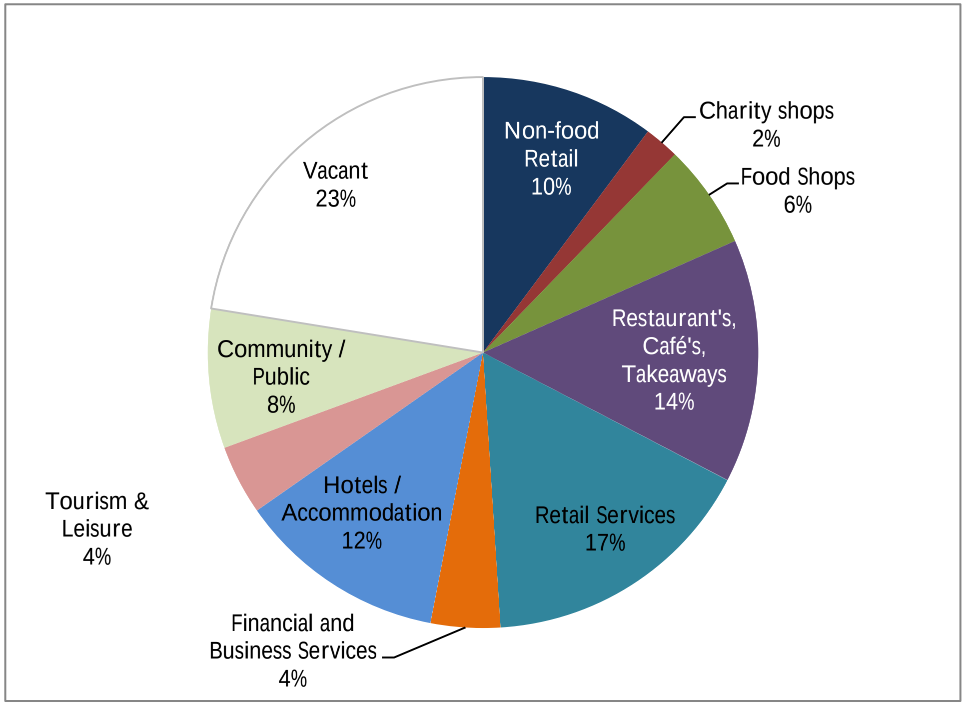
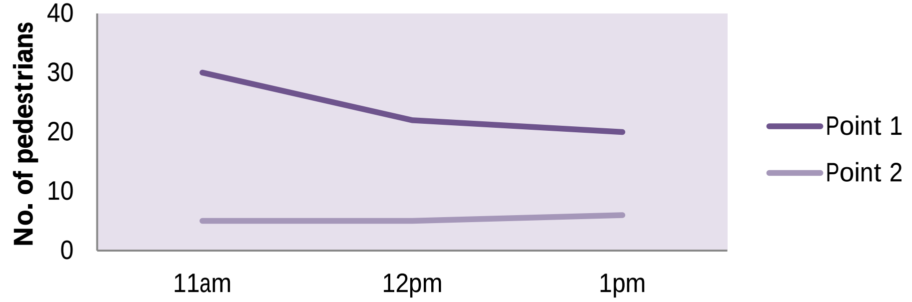


Figure 8: Pedestrian count



[5] Understanding Scottish Places, http://www.usp.scot/

had considerably lower counts than Point 1 (by the Co-op) illustrating that Point 1 forms the central hub of activity.

Physical Environment

Overall the town centre is in good physical condition, and typical of Badenoch and Strathspey has a strong historic character and long linear layout. The shop fronts are generally in good condition apart from some vacant properties. The town centre provides a pleasant environment, particularly around the park area. However traffic does dominate the High Street.

In terms of investment, The Highland Council has completed the renovation of the Court House in the middle of the town centre which is a historically important/ land mark building. The town centre feels busy around the central area (Point 1 on the Map) with a high proportion of independent shops which make it attractive, unique and contribute to sense of place. There is a well maintained area of green space in the town centre which enhances the built environment.

Contrary to the increase in vacant premises, informal comments received during the TCHC reported that there is a perception that it has improved significantly over the last few years and has seen an increase in businesses.

Accessibility

The town centre is focused around a long linear High Street which whilst is easy to navigate, contains a steady flow of traffic. There is only one formal crossing point which can make movement across the street difficult – particularly for those with mobility problems.

There is on-street parking along the High Street as well as free public car parks which appears to be sufficient. There were no obvious cycling facilities but plenty of areas where bikes could be chained up, however signage for cycle routes could be improved.

Kingussie is well served by public transport for its size with both bus and rail services heading north and south, however they do not connect so there is a potential opportunity to better integrate services.

SWOT Analysis

Overall, the Town Centre Health Check identified the following:

STRENGTHS	WEAKNESSES
· Strong historic character/architecture; · High number of independent shops; · Attractive green space at western end of town centre; · Renovation of Court House on the High Street.	· Strong presence of traffic along the High Street and lack of crossing places · Visitor information boards tucked away from High Street.
OPPORTUNITIES	**THREATS**
· Future cycle path connection and opportunity to promote cycling in the town; · Integration of bus and rail services.	· Increasing numbers of vacant premises


KINGUSSIE
Town Centre boundary
Point 2
Point 1
0.1
Miles

3.5 NEWTONMORE

Newtonmore is a village which lies on the western edge of the National Park, around 3 miles south west of Kingussie. It also has a long linear village centre typical of the area with a strong historic character. It has a population of just over 1,000[6].

The business composition chart (Fig. 9) shows that there is a more limited range of business types in comparison to other town centres. This is largely due to the scale of the village and there is therefore less demand for retail services or financial and business services.

Key Changes

In 2016, Newtonmore had one of the highest vacancy rates at 20%, and whilst this was only a small number in real terms (3), this has now decreased to 0. Two of the previously vacant premises have now been converted to dwellings and these premises have now been removed from the survey. The other remaining vacant unit is now back in use.

It should also be noted that there are businesses in Newtonmore that lie just outwith the town centre. For consistency these have not been counted in the current TCHC however it is proposed this should be revised in the next LDP.

Retailer representation ratios in this context are difficult to provide due to the very low numbers of retail outlets.

Given the size of Newtonmore, pedestrian counts provide limited information. They are slightly lower than the 2016 survey, however this does not provide an accurate indication of Newtonmore's vitality but reflects the more dispersed nature of its town centre.

Figure 9: Composition of town centre businesses

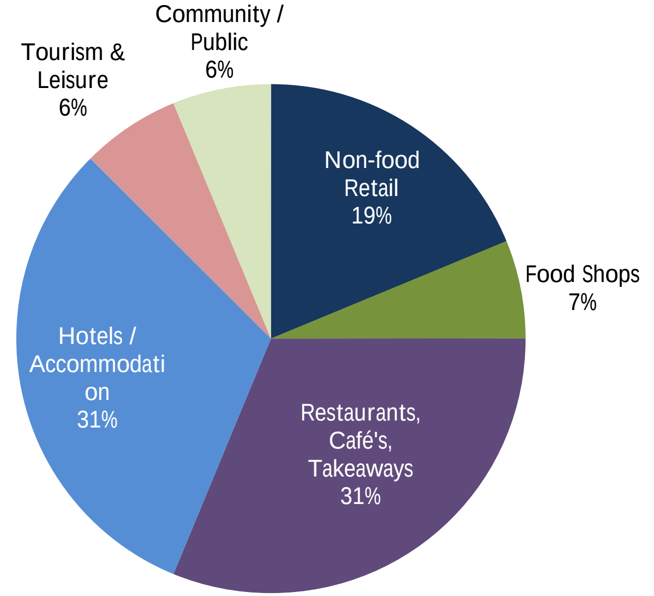
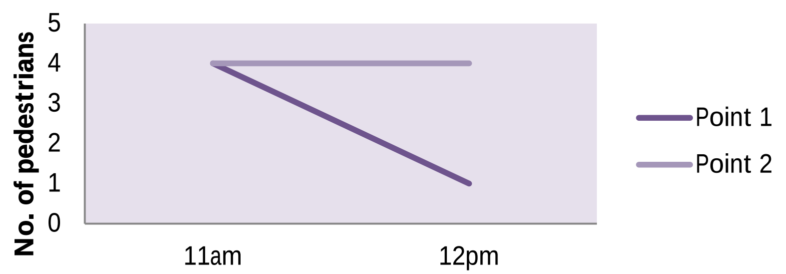


Figure 10: Pedestrian count



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6 Understanding Scottish Places, http://www.usp.scot/

Physical Environment

The village centre is well maintained and clean with hanging baskets on traditional lamp columns and tub planters on pavements. The village contains a linear street pattern with properties mostly on the street edge, and some more modern back-land development. There is no real defined 'High Street' with any shops being interspersed with residential properties (and in places, dominating).

There are no traditional local shops – butcher, baker etc – however there are a few tourist shops/cafes and at the time of the TCHC, a pop-up shop had been set up demonstrating an innovative approach to using vacant premises and improving the town centre.

Accessibility

As with other centres in Badenoch, Newtonmore is based on a linear pattern which is easy to navigate. There is one pedestrian crossing however this is adequate given the limited footfall and the facilities available. There is good signage however is sometimes cluttered.

There is constant through traffic however there is adequate parking on-street and parking areas. There are no obvious links to cycle paths or facilities, despite it being on the National cycle route.

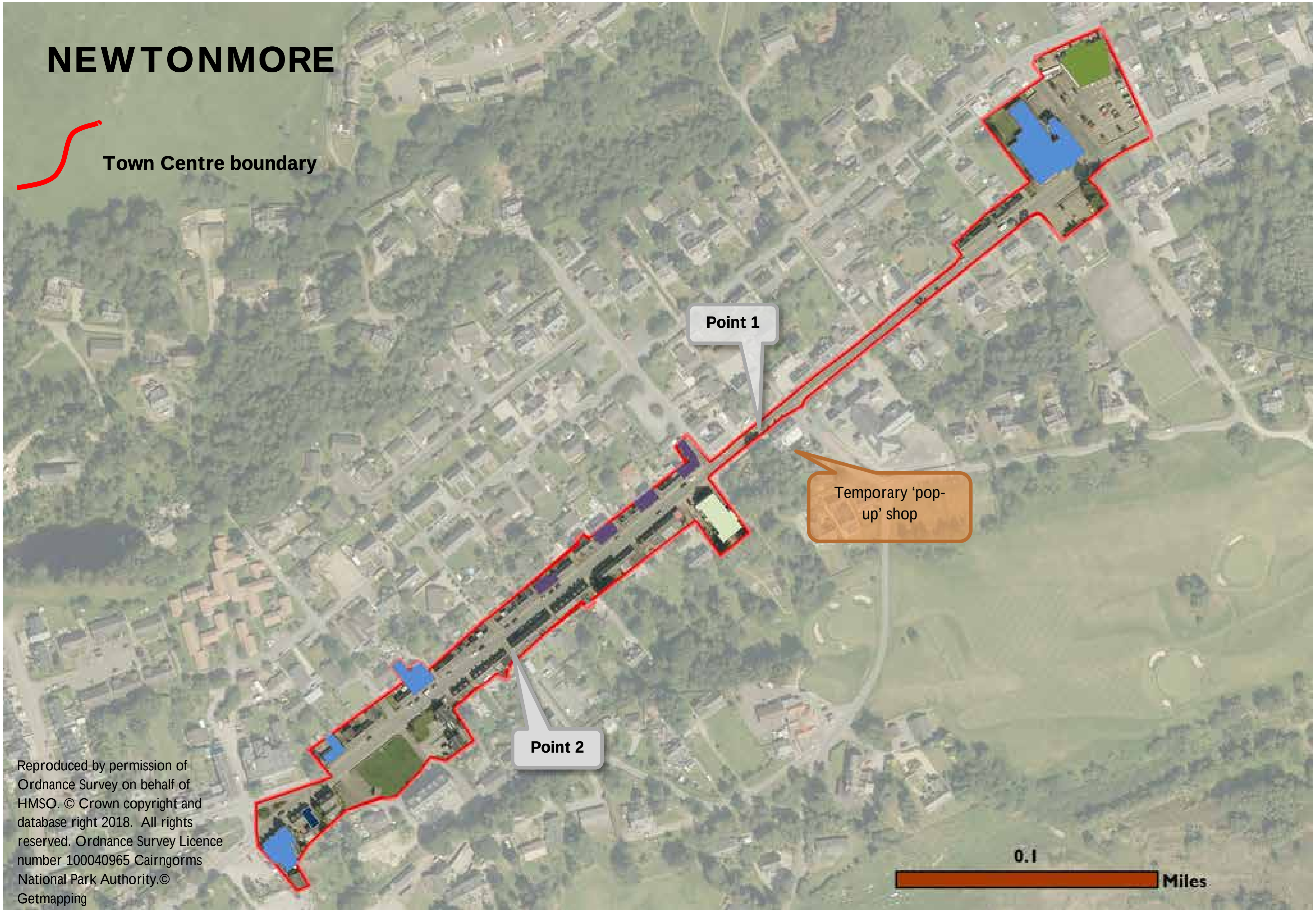
Newtonmore's town centre has limited public transport - bus services are limited which may not attract people to the village and the rail station is not within walking distance.

Overall, there is an apparent sense of pride of place and community evident through the well maintained flower planters, the streets are well maintained. There are a high proportion of independent shops which make it attractive and unique.

SWOT Analysis

Overall, the Town Centre Health Check identified the following:

STRENGTHS	**WEAKNESSES**
· Strong historic character/architecture; · High number of independent shops; · Attractive public space in centre of High Street and good street lighting; · Current renovation of former Co-op building. · Streets well maintained and tidy, with attractive flower planting. · Utilising existing vacant unit as a 'pop up'.	· Lack of obvious cycling facilities. · No central point in the town and shops are dispersed along the high street.
OPPORTUNITIES	**THREATS**
· Future cycle path connection and opportunity to promote cycling in the town; · Utilising other vacant shop fronts for aesthetic improvement – i.e. Art displays, window graphics.	· Infrequent transport services and train station some distance from the High Street. · The Co-op is on the edge of the centre, drawing focus away from the High Street. It has own parking/bus stop etc, which potentially reduces footfall in the centre.


NEWTONMORE
Town Centre boundary
Point 1
Point 2
Temporary 'pop-up' shop
0.1
Miles
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- **CNPA, 2016. Grantown-on-Spey Town Centre Pilot Project** (http://cairngorms.co.uk/wp-content/uploads/2016/07/160331TownCentrePlanningGuidanceApril2016.pdf)
- **Scottish Government, 2014. Scottish Planning Policy** (http://www.gov.scot/Resource/0045/00453827.pdf)
- **Scottish Government, 2015. Town Centre Toolkit** (https://s3-eu-west-1.amazonaws.com/stpfiles/resources/Town-Centre-Action-Plan-Masterplanning-Toolkit.pdf)
- **Scottish Government, 2016. Grantown-on-Spey: Providing a platform for local stakeholders to take forward ideas for the town centre 'How To' Guide (**https://s3-eu-west-1.amazonaws.com/stpfiles/resources/best-practice-and-case-studies/How+To+Guides/GRANTOWN-ON-SPEY+PROVIDING+A+PLATFORM+FOR+LOCAL+STAKEHOLDERS+TO+TAKE+FORWARD+IDEAS+FOR+THE+TOWN+CENTRE+HOW+TO+GUIDE.pdf)
- **Understanding Scottish Places website and tool (**www.usp.scot)