Cairngorms National Park Authority

Local Development Plan Background Evidence

2. The Economy

21/07/11

This is one of five Background Evidence Reports that have informed the Cairngorms National Park Main Issues Report. These reports look at:

1. Housing and population – sets out the rationale for the new housing requirements identified in the Main Issues Report. It looks at how the population of the Park is expected to change and considers the impact this may have on the future number and types of households in the Park. It also summarises the Housing Need Demand Assessments produced by the Local Housing Authorities and identifies the housing land supply

2. The economy - sets out the rationale for the new employment land identified in the LDP. It looks at the evidence which exists, the demand information gathered as part of a study commissioned to support the LDP and any available information published by the Local Authorities.

3. Monitoring report – an assessment of progress on the implementation of the adopted Local Plan (October 2010)

4. Other information – summary of other information which has informed the development of the Main Issues Report

5. Site analysis – an assessment of potential development sites submitted by landowners, developers and agents as part of the CNPA 'Call for Sites' process.

These reports set out the rationale for the approach taken in the Main Issues Report on the various topics. They provide detail not contained within the Main Issues Report, and should be read together with the MIR Report to get a full picture.

Any comments or responses to the content of these reports should be included within your response on that part of the Main Issues Report and should not form a separate comment or response.

Contents

1. Introduction

1.1 The Local Development Plan (LDP) must identify sufficient land to meet the needs for employment land for its area. It must focus on the main proposals for development for the plan period although it is helpful to give clarity on options for development beyond that time.

1.2 This report sets out the rationale for the new employment land identified in the LDP. It looks at the evidence which exists, the demand information gathered as part of a study commissioned to support the LDP and any available information published by the local authorities.

2. Policy Framework

The Cairngorms National Park Plan 2007-2012

2.1 The LDP is a key tool in the delivery of the vision and outcomes of the National Park Plan (NPP)[1]. The NPP provides an overarching context for development planning and development management within the Cairngorms National Park. The long-term vision for the National Park needs communities that are sustainable in social, economic and environmental terms. To achieve this it sets a number of strategic objectives which are aimed at achieving sustainable growth of the economy which it recognises as being key to supporting sustainable communities, and creating a strong and vibrant National Park which also stimulates and supports the wider regional economy.

- Create conditions conducive to business growth and investment that are consistent with the special qualities of the Park and its strategic location.
- Encourage entrepreneurship, especially in young people and in sectors which complement the special qualities of the Park.
- Promote 'green business' opportunities.
- Promote opportunities for economic diversification across all areas of the Park.
- Address barriers to employment uptake.
- Raise the profile and excellence of local produce and services.
- Promote access to education and vocational training in all levels across the Park.
- Ensure a match between training provision and current/future skills needed.

2.2 In its aspirations relating to the economy and employment, the NPP also sets a series of strategic objectives for land management which are also relevant.

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[1] Cairngorms National Park Plan 2007-2012

2.3 Whilst it is important to remember that the NPP is currently being reviewed, it is still the key document which guides the overarching context for development planning and development management until it is formally replaced. The LDP will however take cognizance of the ongoing work to revise the NPP to ensure the two documents will be in accord on completion.

Scottish Planning Policy

2.4 SPP[2] is clear that the planning system should proactively support development that will contribute to sustainable economic growth and to high quality sustainable places. It should enable the development of growth- enhancing activities across Scotland while protecting and enhancing the quality of the natural and built environment which are assets for that growth. We should recognise and respond to economic and financial conditions in considering proposals that could contribute to economic growth.

2.5 Planning authorities are directed to ensure there is a range and choice of marketable sites and locations for businesses allocated in development plans. This should include sites which provide a variety of sizes and opportunities for a variety of uses, including mixed use developments. The supply of suitable sites should be reviewed regularly and new sites brought forward where existing allocations do not meet current and anticipated market expectations. The specific needs of different businesses should be taken into account in development plans, including the importance of access to the transport network.

2.6 Development plans should also support small business development and growth, and promote opportunities for low-impact industrial, business and service uses which can co-exist with housing and other sensitive uses without eroding amenity. We should adopt a flexible approach to working from home where the amenity of surrounding properties will not be significantly affected.

2.7 New development should safeguard the area's environmental quality and promote opportunities for enhancement and regeneration where appropriate.

Economic Strategies

Government Economic Strategy

2.8 The Government Economic Strategy sets out how sustainable economic growth will be achieved.[3] It identifies five strategic priorities that are critical to economic growth:

- learning skills and wellbeing;
- supportive business environment;
- infrastructure development and place;
- effective government;
- equity.

Aberdeenshire Council

2.9 Although much of the economic strategic guidance and direction provided by Aberdeen City and Shire focuses on the city and its immediate hinterland, it is still important that we, in the National Park take proper account of the growth aspirations, and play what part we can in realising them in that part of Aberdeenshire that falls within the National Park Boundary. The Economic Manifesto's vision[4] is to achieve an economy which is one of the most robust and resilient in Europe, with a reputation for opportunity, enterprise and inventiveness. This will be done in the context of high-quality options for growth in an environment that is interesting and enjoyable.

2.10 Eight strategic priorities to achieve this vision have been identified. Among those

2 Scottish Planning Policy 2010 para 33

3 The Government Economic Strategy 2007

4 Building on Energy – The Economic Manifesto for Aberdeen City and Shire 2007

most relevant to our part of Aberdeenshire are:

- Deliver a fully integrated transport network.
- Maximise our intellectual capital – people and expertise.
- Attract and develop skilled people.
- Improve the efficiency of planning decision making.

To achieve these, availability and access to land for expansion is critical.

The Highland Council

2.11 Highland Council is committed to a number of areas of work to support economic development across the Highlands[5]. Of particular relevance to the Local Development Plan are:

- Recognise and support the importance of the Cairngorms National Park to the Highland economy.
- Work with Highlands and Islands Enterprise (HIE), Scottish Development International and statutory infrastructure providers to make the Highlands one of the most attractive places to do business in Scotland.
- Work with the Scottish and UK Governments and partners to prevent and reduce poverty by supporting more people into sustained employment.
- Continue to decentralise Council jobs throughout the Highlands and work with partners to identify opportunities for further dispersal of public sector jobs.

2.12 To achieve these commitments, we must ensure a suitably supportive development plan allows for appropriate development which supports the economic, and is suitably flexible to react to the dynamic economic situation found in this part of Scotland.

Moray Council

2.13 A major new economic strategy is being developed by Moray Council. It will supersede the existing Moray 2020 document and will set the long-term economic diversification strategy for the area.

2.14 A small part of Moray Council falls within the National Park and the economic strategy will apply to that area around Tomintoul and Glen Livet. This is an area which has suffered as a result of the current economic climate. Business closures have had a detrimental impact on the community as a whole.

2.15 Whilst undoubtedly the Council strategy will deal with the impact of RAF Kinloss and continued uncertainty over RAF Lossiemouth, it is will also give direction to the whole of the Council area.

Perth & Kinross Council

2.16 Perth & Kinross Council have a vision for their communities: 'we will create and sustain vibrant, safe, healthy and inclusive communities in which people are respected, nurtured and supported and where learning and enterprise are promoted'[6]. To achieve this, they have recently reviewed their Economic Strategy to take account of recent changes in the national and local economy. As part of this strategy, there are a number of priorities, some of which are relevant for that part of Perth & Kinross which falls within the National Park boundary:

- Provide focused, joined-up and appropriate business advice and support.
- Focus on growth opportunities (including tourism, renewable energy and the general insurance sector).

2.17 The provision of appropriate amounts of land to meet the needs of the business sector in that part of the Park is important if these priorities are to be achieved.

[5] Highland Council Corporate Plan and Council Programme 2009-2011

[6] Perth & Kinross Community Plan 2006-2020

3. Employment Land Audits

3.1 SPP directs local authorities to carry out a regular review of the available land for economic growth to ensure it is appropriate and effective. Within the National Park, Aberdeenshire Council prepare an annual review.[7] Only one site falls within the National Park boundary. The site at Tullich Road provides 0.4ha of effective land to meet the local demand. The other Local Authorities Do not have no current audits to help inform the Main Issues Report.

[7] Aberdeen City and Shire Employment Land Audit 2010 – see Appendix 1

4. Development Land for Commercial and Industrial Use – Study

4.1 The CNPA, together with Highlands and Islands Enterprise, commissioned a review of the supply of and demand for development land for commercial and industrial use within the National Park.[8] Specifically this study looked at land suitable for development falling within Use Classes 4, 5 and 6 of the Town and Country Planning Use Classes Order (Scotland) 1997.

4.2 Historically, the CNPA has had difficulty gauging need and demand for commercial land. This study targeted key businesses and organisations to assess their future requirements, and provide robust evidence of demand. The study also assessed existing supply both allocated in the adopted Local Plan and in established commercial sites.

4.3 The research found limited demand, with five companies with active requirements for land totalling 12 to 12.5 acres. However, the study does conclude that with the unique economy in the Park and its increasing population there is undoubtedly a need to have cost-effective, viable development land, certainly in the larger settlements.

4.4 The Local Development Plan must plan ahead and provide sufficient flexibility to react to unknown demand in support of a sustainable and thriving economy. The study suggests two options to achieve this, and we agree that focusing on a number of strategic sites across the Park, which conform to the settlement strategy is the most appropriate way forward. Other land should, however also be included where it supports the local community.

[8] Development Plan for Commercial and Industrial Use 2011

5. The Economic and Social Health of the Cairngorms National Park, 2010

5.1 In 2010, the CNPA commissioned a study[9] to establish the economic and social baseline of the communities in and around the National Park. This report is useful to the Local Development Plan as it highlights particular parts of the economy of which we must be aware. An appropriate policy framework must be put in place to support these in the future.

5.2 This report concludes that the structure of the Cairngorms National Park's economy is highly unusual, with a distinctive mix of industries contributing to the area's creation of wealth. Whisky production and forest products are particularly distinctive. The Park also includes the most tourism-focused parts of Scotland. Recent growth in the importance of the public sector, land based industries and the food and agriculture sectors all add to the dynamics of the economy.

5.3 The Cairngorms National Park is also home to a small number of significant manufacturing operations. Their main trade links are usually with organisations outwith the Park and they tend to either be long established organisations which have diversified into new fields or they have located in the area thanks to the high quality natural environment. There is evidence that the region is becoming an attractive base for other innovative industries. In the study, a cluster of creative, media and knowledge based businesses is identified. This contributes an estimated £4 million of value added to the Park's economy each year.

5.4 The Local Development Plan must make appropriate provision for all these sectors, and anticipate the likely demands, principally on the need for land specifically allocated for that use, and on the need for a flexible but supportive policy framework to facilitate appropriate growth and investment.

[9] The Economic and Social Health of the Cairngorms National Park, 2010

6. Monitoring the Health of Our Town Centres

6.1 The Local Development Plan must take into account the current position within the key areas of economic activity in the Park. As a result the town centres of the main settlements have been surveyed.

6.2 'Town Centres are a key element of the economic and social fabric of Scotland, acting as centres of employment and services for local communities and a focus for civic activity.' [10] The Local Development Plan should enable gaps and deficiencies in town centres to be remedied by identifying appropriate locations for new development and regeneration. Scottish Planning Policy goes on to clarify that: 'to be identified as a town centre a diverse mix of uses and attributes, including a high level of accessibility, must be provided'. Successful town centres provide a diverse range of community and commercial activities, including places of employment, open spaces and meeting places. They are a mix of interdependent land uses which, when taken together with their physical structure, should create a unique sense of place, character and identity. Retail and leisure provision are fundamental to the concentration of other activities located in town centres.

6.3 To inform the approach taken in the LDP, an assessment of all the town centres in the Cairngorms National Park has been undertaken. This has taken the form of a health check. Planning Advice Note 59 gives us direction on how to conduct a health check, and this approach is the one used across the National Park. The information gathered through the health checks can then be applied to town centre strategies and for subsequent positive action to improve quality and competitiveness.

6.4 A health check is the appropriate monitoring tool to measure the strengths and weaknesses of a town centre and to analyse the factors which contribute to its vitality and viability ('V&V indicators'):

- **Vitality** is a measure of how lively and busy a town centre is.
- **Viability** is a measure of its capacity to attract ongoing investment, for maintenance, improvement and adaptation to changing needs.

6.5 Together these measures give an indication of the health of a town centre and, when used consistently over a period of time, can demonstrate changes in performance that can inform future decision making. A range of key performance indicators can be used to provide an effective insight into the performance of a centre and so offer a framework for assessing vitality and viability. For example:

- **Pedestrian flow** (footfall) measures the numbers and movement of people on the streets. Counts should be collected on a consistent basis over a period of time, at different locations and times.
- **Prime rental values** provide a measure of the relative position of locations or streets within a centre and give an indication of retailer desire to locate within an area.
- **Space** in use for different town centre functions and how it has changed.
- **Retailer representation and intentions**: national multiples and independents.
- **Commercial yield**. Although a valuable indicator of retail viability, it needs to be used with care as, in part, it reflects a developer's rather than a retailer's interest in locating in an area.

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[10] Scottish Planning Policy 2010

- **Vacancy rates**, particularly street-level vacancy in prime retail areas.
- **Physical structure** of the centre, including opportunities and constraints, and its accessibility.
- **Periodic surveys** of consumers.
- **Crime** – co-operation with the local police Architectural Liaison Service can assist in identifying persistent or potential problems in an area.

6.6 A number of other indicators are also recognised, including: environmental quality, turnover, available expenditure and competing investment and tourism.

6.7 The main purposes of collecting V&V data generally relate to the following key functions:

- To support the preparation and implementation of development plan policies and proposals for town centres.
- To inform proactive planning and investment for town centres strategies acting as a baseline for investment decisions and priorities over time.
- For development management purposes for the assessment of retail proposals.

Cairngorms National Park Town Centre Health Checks

6.8 Health checks have been undertaken in each of the Cairngorms National Park's strategic settlements as identified in the Cairngorms National Park Local Plan – Aviemore, Ballater, Grantown-on-Spey, Kingussie and Newtonmore. These 'checks' use surveys and assessments of the provisions and perceptions of the centres, and are a good way of gauging the vitality and viability of town/village centres. Overall judgements are made on site inspections only. The checks have been applied to two distinct areas:

- Within identified town/village centres (typically the traditional high street and other areas identified as containing the commercial/social and core functions of a town).
- Within edge of town/village centres which are peripheral areas but with some of the main functions or facilities.

The 2010 health check provides a baseline for future monitoring, allowing for ongoing and comparative review of the performance of the centres.

Summary of Indicators – Retailer Representation

6.9 Successful centres should have a good range of shops including specialist independents, for example deli's, and national multiple retailers, for example Co-operative food stores.

6.10 In all of the strategic settlement centres with the exception of Aviemore, specialist independent stores are dominant. The Co-operative food store does however occur in almost every community (again, with the exception of Aviemore). Small, independents, ranging from deli's to gunsmiths and galleries, make up the majority of stock.

	Specialist independents	National multiple retailers	Charity shops	Vacancies
Aviemore	10	16	2	1
Ballater	21	2	1	4
Grantown-on-Spey	23	4	1	6
Kingussie	15	2	0	4
Newtonmore	4	1	1	3

Summary of indicators – diversity of uses

6.12 Successful centres should be diverse and perform a variety of roles to attract a wide range of visitors and shoppers at all times of the day; the importance of diversity to the success of a centre ensures it should be more than just retail – various uses and a broad range of facilities are to be assessed.

6.13 The number of office premises is limited mainly to estate agents, solicitors, the CNPA and the various councils. A prominent feature of all the strategic settlement centres is the number of cafés, takeaways and restaurants. Aviemore has the highest number of these. Many places offer a variety of functions such as cafés, bistros and bars, often within hotels. This emphasises the role of the centres as tourist hubs for the Park and beyond.

	Offices	Cafés and Tearooms	Restaurants	Bars
Aviemore	2	4	9	5
Ballater	6	4	3	2
Grantown-on-Spey	8	2	2	2
Kingussie	5	5	2	4
Newtonmore	0	4	4	4

Summary of indicators – environmental quality

6.14 This is measured using an appraisal of the centre considering the appearance of the environment, the quality of its buildings, the public spaces, its sense of place, cleanliness, signs of decay and neglect and visitor infrastructure.

6.15 Many of the centres benefit from a distinct sense of place, and high quality environment with good green spaces. Ballater and Grantown-on-Spey are particularly noteworthy. All were clean, without any tangible signs of neglect or decline. Limited signs of investment were also present in Aviemore, Ballater and Grantown-on-Spey.

Summary of indicators – accessibility

6.16 Access is measured using a number of factors including the quality and frequency of public transport, adequacy of car parking, ease of pedestrian movement, traffic impact – whether the centre is located on a busy main road, is it traffic calmed or does it suffer from chaotic car parking.

6.17 Many of the centres were to some degree blighted by high volumes of through traffic and high levels of car parking principally on the main streets. This is to be expected during the high points of the tourist season. Aviemore in particular suffers badly. Some chaotic car parking seemed to disrupt traffic flows especially in Kingussie. Public transport provision appears to be good in the majority of centres.

Summary of indicators – tourism

6.18 Visitor facilities are recorded, including the range and quality of visitor attractions, information and signage.

6.19 Given the predominance of the tourist industry in many of the centres, tourist attractions are generally lacking as are information points and signage. All had Tourist Information Centres (TIC). Newtonmore, in particular, provided good levels of tourist facilities.

Conclusions from town centre health check

6.20 The surveys have showed our town centres to be above average. Every effort should be made to ensure this position continues and improves where possible. The Local Development Plan should therefore make appropriate provision for positive support for the town centres found in the Park.

7. Key Issues for the Local Development Plan to Address

7.1 Based on the information available, the Local Development Plan will have to identify land to support the economy of the Park. In light of the lack of empirical information on land requirements a supportive policy framework will also be required. This dual approach will help direct any identified need to appropriate sites, but also allow for appropriate ad hoc development which supports economic growth.

8. Assumptions and Flexibility

8.1 The CNPA must be satisfied that it has made every effort to identify need and demand for economic and industrial land it its preparation of the Local Development Plan.

8.2 We must consider the level of available information and provide support through the planning system for appropriate development.

8.3 A degree of flexibility must also be included to ensure that the whole of the Park has sufficient provision to meet need and demand. The geography of the Park creates a number of market areas. Provision in one will not necessarily meet the needs of another.

9. The Employment Land Requirement and the Current Local Plan

9.1 The current adopted Local Plan provides for some economic opportunity, and supports existing businesses. It did not however identify many opportunities for new investment. This stemmed from a lack of empirical evidence to support the identification of sites to meet both need and demand. The Plan did however recognise that there is undoubtedly an unidentified need and demand for investment opportunity. To deal with this a suite of supportive policies were included.

10. The Employment Land Requirement and the Local Development Plan (LDP)

10.1 In developing the LDP, the CNPA identified a lack of available information to guide development planning for this sector. The various studies referred to above were therefore commissioned to assess both need and demand. It is interesting that the study on Development Land for Commercial and Industrial Use found little empirical need or demand for the identification of new land for investment. Anecdotal information does however point to demand particularly for small start-up business units to house office and light industrial accommodation.

10.2 Focusing investment on strategic settlements which are able to cope with new development is therefore seen as the best approach to guide investment.

11. Conclusions

11.1 The economy of the Park and the way it supports our communities is a key focus for the Local Development Plan. Sustainable economic growth remains a key objective of the Scottish Government and the LDP must facilitate this in a way best fitting to the special qualities of the Park.

11.2 The CNPA has made every effort to assess both the need and demand for additional land to support this sector. It has also completed further baseline assessments to inform the approach to take in planning for the future.

11.3 There is little empirical evidence of need for additional land for investment. However there is clearly a need for the LDP to provide appropriate support to the right form of development which supports both the economy of the Park and its communities.

11.4 The LDP must therefore direct new development to the most appropriate location. The strategic settlements are the most sustainable location for this growth, and building on existing industrial and commercial sections within these settlements focuses businesses together. To ensure appropriate support is given to other ad hoc development which supports both the economy and the aims of the Park, the LDP must include a framework of policies to guide investment.

12. Appendices

Appendix 1	Detailed Town Centre Health Survey Results
Appendix 2	Aberdeen City and Shire Employment Land Audit 2010 (extract)
Appendix 3	Development Land for Commercial and Industrial Use Report

Appendix 1- Detailed Town Centre Health Survey Results

Ranking used

The Town Centre Health Survey used a number of indicators:

- Retail representation
- Diversity of uses
- Environmental quality
- Accessibility
- Tourism

Each indicator is scored on a scale of 1 – 5.

Score	Rating
1	Very Poor
2	Poor
3	Average
4	Good
5	Very Good

Aviemore

Survey date: 20 July 2010 (RG)

Vitality and Viability Performance Indicators

Indicator	**Factor**	**Total** (where appropriate quoted also as % overall)
Retailer representation (good range of shops)	Multiple (national) retailers	16 *no*
	Independent specialist Shops	10 *no*
	Charity/discount shops	2 *no*
	Range of food Shopping (convenience or supermarket)	2 *no* Score: 4
	Range of shops overall	Score: 3
	Vacant premises rate (occupancy levels)	1 *no*
	Investment by retailers (evidence of improvements etc)	Score: 4 – new builds
Space in use for different functions (diversity of uses)	Offices (financial and professional services)	2 *no*
	Cafes, tea rooms, pubs, restaurants	17 *no*
	Community/other facilities (specify)	Library, community hall
	Essential rural services – post office, banks etc (specify)	Post Office, banks
	Range and diversity of uses overall	Score: 3
	Vacant premises rate (occupancy levels)	Score: 4
	Investment by users (evidence of improvements etc)	Score: 4
Environmental quality	Appearance of the environment generally	Score: 3
	Sense of place (distinctiveness and local identity)	Score: 3
	Signs of decay, decline and neglect	Score: 3
	Signs of recent investment/improvements	Retail unit construction
Accessibility	Quality and frequency of public transport	Score: 4
	Ease of pedestrian movement (including people with mobility difficulties)	Score: 3
	Traffic impact	Score: 2
	Car parking provision	Score: 3
Tourism	Range and quality of attractions (specify)	Score: 2
	Visitor information, signage	Score: 3

Notes and observations: (opportunities for improvements, potential development opportunity sites)
• Very high levels of through traffic, some buildings of character and note. • Aviemore Highland Resort (AHR) gap site – improvement works needed.

SWOT Analysis

Strengths	Opportunities
• Large visitor numbers • Number of independent specialist shops • Tourist Resort focus,	• Public realm improvements
Weaknesses	**Threats**
• Lack of alternative tourist attractions – retail only, TIC • No real built heritage, landmarks • Lack of choice – accommodation, visitor amenities etc • Lack of attractive green spaces	• Lack of tourist info and facilities • Increased car parking pressures, traffic volume • Large numbers of cafes, restaurants, sports shops – over dominant • High retail/sportswear dependency • Seasonal visitor pull

Inventory

Grampian Road	Name	Use Class
1.	Mackenzie's Highland Inn	LS9
2.	A.Munro & Co/Remax/A Stewart Financial Advisor	OFF1
3.	Winking Owl, 2 Hoots	LS10
4.	VACANT (former Haddows)	
5.	Walkers Shortbread	CNV1
6.	Snippitz Hair/Aviemore Beauty	RS4/RS5
7.	Panchos Takeaway/Restaurant	LS10
8.	La Boheme Restaurant	LS10
9.	The Village Centre Shops	COM 15
10.	Spey Valley Hardware & Household Stores	COM 18
11.	Aviemore News/Post Office/Opticians	Various
12.	Snow Mountain Takeaway	LS8
13.	Scotbet.com	LS4
14.	Ryder Foundation Charity Store	COM 5
15.	Boots the Chemist	COM 6
16.	Skiing Do Restaurant	LS10
17.	Thain Electrical	Com 12
18.	2 retail units under construction	
19.	RBS	FBS10
20.	Police Station	
21.	Papa Rock Pub	LS1
22.	Cairngorm Mountain Sports/Blue Mountain Cafe	COM 30/LS3
23.	Public Toilets	
24.	Subway Takeaway	LS8
25.	Fat Face	COM 20
26.	Julian Graves (Health Foods)	CNV 6
27.	HBOS	FBS10
28.	Tesco Supermarket	CNV 10
29.	Country Crafts	COM 8
30.	Frasers Butchers and Deli	CNV 2
31.	Blacks	COM 30

32.	Bridgemill Direct	COM 20
33.	Smiffy's Fish and Chips	LS8
34.	Ashers Bakery	CNV 1
35.	Semi-Chem	COM 6
36.	Café Bleu Coffee Shop	LS3
37.	TIC	TOU2
38.	The North Face Shop	COM 20
39.	Ellis Brigham Mountain Sports	COM 30
40.	Café Mambo	LS3
41.	Speyside Countrywear	COM 20
42.	Nevisport	COM 30
43.	Waterstones	COM 3
44.	The Coffee Corner	LS3
45.	Cairngorm Hotel	LS9
46.	Roo's Leap Restaurant	LS10
47.	Railway Station	
48.	Highland Property Services	FBS 9
49.	WH Smith	COM 25
50.	Spice of India	LS10
51.	Highland Hospice Charity Shop	COM 5
52.	Esso Garage	COM34
53.	Mountain Sports	COM 30
54.	AHR (food court and retail)	LS9/COM 8
55.	The Apartment (self-catering)	LS9
56.	Royal Tandoori	LS10
57.	Happy Haggis Fish Bar	LS8
58.	Active Aviemore	COM 30

Ballater

Survey date: 16 June 2010 (RG)

Vitality and Viability Performance Indicators

Indicator	**Factor**	**Total** (where appropriate quoted also as % overall)
Retailer representation (good range of shops)	Multiple (national) retailers	2 *no*
	Independent specialist shops	21 *no*
	Charity/discount shops	1 *no*
	Range of food shopping (convenience or supermarket)	6 *no* Score: 3
	Range of shops overall	Score: 3 – lack of choice of foodstores
	Vacant premises rate (occupancy levels)	4 *no*
	Investment by retailers (evidence of improvements etc)	Score: 3
Space in use for different functions (diversity of uses)	Offices (financial and professional services)	6 *no*
	Cafés, tea rooms, pubs, restaurants	9 *no*
	Community/other facilities (specify)	Score: 3 (town hall, toilets, TIC)
	Essential rural services – post office, banks etc (specify)	Score: 2 (bank, post office)
	Range and diversity of uses overall	Score: 3
	Vacant premises rate (occupancy levels)	Score: 3
	Investment by users (evidence of improvements etc)	Score: 3
Environmental quality	Appearance of the environment generally	Score: 4
	Sense of place (distinctiveness and local identity)	Score: 4
	Signs of decay, decline and neglect	None
	Signs of recent investment/improvements	None
Accessibility	Quality and frequency of public transport	Score: 4
	Ease of pedestrian movement (including people with mobility difficulties)	Score: 4
	Traffic impact	Score: 3
	Car parking provision	Score: 4
Tourism	Range and quality of attractions	Score: 2 – no real attractions
	Visitor information, signage	Score: 4

Notes and observations: (opportunities for improvements, potential development opportunity sites)
• Large numbers of tourists, coach tour parties, little attractions other than retail, art galleries. Number of cafes and tea rooms are large and increasing. • Loirston Hotel currently empty – edge of centre.

SWOT Analysis

Strengths	**Opportunities**
• Large visitor numbers, high number of independent specialist shops, distinct sense of place. • Attractive green spaces.	• Distinct town centre environment – sense of place.
Weaknesses	**Threats**
• Lack of alternative tourist attractions – retail, galleries only, TIC, museum. • Lack of choice – foodstores.	• Lack of tourist info and facilities. • Increased car parking pressures, traffic volume. • Large numbers of cafés, tea rooms – over dominant. • Seasonal visitor pull.

Inventory

Bridge Square	**Name**	**Use Class**
1.	Outreach Upper Deeside, Support Centre and Charity Shop	COM5 charity Shop
2.	La Mangiatoia	LS10 restaurant
3.	Residential	R1
4.	Alexandria Hotel	LS9 hotel
Bridge Street		
5.	Residential	R1
6.	Byzantium Furnishings	OR1other retail
7.	Aberdein Considine	FBS6 legal services
8.	HBOS	FBS 10 bank
9.	HM Sheriden	CNV12 butcher
10.	Residential – undergoing change of use to café	R1
11.	Countrywear Gunsmiths	COM30 sports, camping etc
12.	Co-operative Food Store	CNV3 convenience store
13.	Rowan Jewellery	COM19 jewellery
14.	Mikahail Pietranek	COM32 textiles etc
15.	Laurie & Co.	FBS6 legal services
16.	Brown Sugar Café	LS3 cafés
17.	Davidson's Chemists	COM6 chemists
18.	Cybernaut Internet & Computers	COM12 electrical etc
19.	A B Yule Toy shop	COM33 toys
20.	Deeside Books	COM3 booksellers
21.	Fraser & Mulligan Solicitors	FBS6 legal services
22.	2 STR8 Hairdressers	RS5 hairdressers
23.	Residential	R1
Victoria Road		

24.	Rowan Antiques & Art	COM1/COM2 antiques/art
25.	The Green Restaurant	LS10 restaurant
26.	Residential	R1
27.	Loirston Hotel - VACANT	LS9 hotel
Church Square		
28.	Cycle Highlands Bike Shop	COM9 cycles
29.	Ballater Public Convenience	N/A
30.	Glenaden Hotel	LS9 hotel
31.	Prince of Wales Pub - VACANT	LS1 bars
Golf Road		
32.	New Shanghai Chinese Takeaway	LS8 takeaway
33.	Chalmers Bakery	CNV1 bakers
34.	Stagecoach Bus Depot	N/A
35.	G Strachan Deli	CNV4 deli
36.	Bean for Coffee Café	LS3 café
37.	Delicatessen	CNV4 deli
38.	A. Cassie Hardware	COM18 hardware
39.	The Bothy Café	LS3 café
40.	The Outdoor Store	COM30 sports, camping etc
41.	D P Opticians	RS6 opticians
42.	Ballater Flowers	COM13 florists
43.	A C Yule	COM3 booksellers
Netherley Place		
44.	Balmoral Public House	LS1 bars
45.	Ballater Post Office	RS10 post offices
46.	Daisy's Gifts – Vacant/ Hair Loft	COM17 cards/RS5
47.	B&B guest House	LS9 guest houses
48.	Co-operative Food Store	CNV3 convenience
49.	No.46 Gallery	Com2 art
50.	McEwans Clothing	COM20 clothing
Station Square		
51.	Townhall/Library/CNPA office	CIV1/CIV2
52.	Old Royal Station TIC/café/CNPA office	TOU1/LS3
53.	Dee Valley Confectionery	CNV1 confectioners
54.	E J Emslie House Furnishers	COM32 soft furnishings
55.	Bike Station Hire and Sales	COM9 cycles
56.	VACANT	
57.	B&B Guest House	LS9 guest houses
58.	McEwans at Home	COM18 household goods
Viewfield Road		
59.	Fish & Chips Takeaway	LS8 Takeaway
60.	Gift Shop - Vacant	

Grantown-on-Spey

Survey date: 17 June 2010 (RG)

Vitality and Viability Performance Indicators

Indicator	**Factor**	**Total** (where appropriate quoted also as % overall)
Retailer representation (good range of shops)	Multiple (national) retailers	4 *no*
	Independent specialist Shops	23 *no*
	Charity/discount shops (specify)	1*no*
	Range of food shopping (convenience or supermarket)	4 *no* Score: 3
	Range of shops overall	Score 3 – lack of choice of food stores
	Vacant premises rate (occupancy levels)	6 *no*
	Investment by retailers evidence of improvements etc)	Score: 3
Space in use for different functions (diversity of uses)	Offices (financial and professional services) (specify)	8 *no*
	Cafés, tea rooms, pubs, restaurants	6 *no*
	Community/other facilities (specify)	3 (community hall, British Legion, TIC)
	Essential Rural services – post office, banks etc (specify)	4 (3 banks, post office)
	Range and diversity of uses overall	Score: 3
	Vacant premises rate (occupancy levels)	Score: 3
	Investment by users (evidence of improvements etc)	Score: 3
Environmental quality	Appearance of the environment generally	Score: 4
	Sense of place (distinctiveness and local identity)	Score: 4
	Signs of decay, decline and neglect	None
	Signs of recent investment/improvements	None
Accessibility	Quality and frequency of public transport	Score: 4
	Ease of pedestrian movement (including people with mobility difficulties)	Score: 4
	Traffic impact	Score: 2 – HGV's
	Car parking provision	Score: 3
Tourism	Range and quality of attractions (specify)	Score: 2 – no real attractions
	Visitor information, signage	Score: 4

Notes and observations: (opportunities for improvements, potential development opportunity sites)
Number of shops, hotels currently empty.

SWOT Analysis

Strengths	Opportunities
• High number of independent specialist shops, distinct sense of place. • Attractive green spaces, built heritage.	• Distinct town centre environment – sense of place in square, traditional high street.
Weaknesses	**Threats**
• Lack of alternative tourist attractions – TIC, museum only. • Lack of choice – food stores.	• Lack of tourist info and facilities. • Increased car parking pressures, traffic volume.

Inventory

High Street	Name	Use Class
1.	Speyside Knitwear	COM8
2.	Residential – 100 High Street	R1
3.	High Street Car Park	N/A
4.	Scissor Trix by Donna	RS5
5.	Ewe & Me Gifts	COM8
6.	Community Centre	N/A
7.	Macleod Building Ltd (office)	OFF1
8.	VACANT	
9.	Strathspey Hotel – VACANT	
10.	Kiltmaker	COM23
11.	Ewe & Me Gifts	COM8
12.	Highland Hospice Charity Shop	COM5
13.	Residential	R1
14.	Church	N/A
15.	Lloyds Pharmacy	COM6
16.	Bliss Hair/Burnett & Co	RS5/FBS6
17.	Wee Gooseberry.com	COM7
18.	Grantown Garage Ltd	COM34
19.	RBS	FBS10
20.	Ben Mohr Hotel (inc bar/bistro)	LS9
21.	Lloyds TSB	FBS10
22.	Chinatown Takeaway/Restaurant	LS8/LS10
23.	Ritchie's Gunsmiths	COM30
24.	Ann's Mill Shop	COM8
25.	Victoria Wines – VACANT	
26.	Chaplain's Coffee House	LS3
27.	Imrays Jewellers	COM19
28.	Grantown Dairy (Deli)	CNV4
29.	The Flower Box	COM13
30.	Cockburn's Solicitors	FBS6
31.	Royal Fish Bar	LS8
32.	Wishing Well Gifts	COM8
33.	Audrey's Coffee Shop	LS3
34.	Beale & Pyper – fire damaged	COM10
35.	Post Office	RS10
36.	Mortimer's Fishing Tackle	COM30
37.	HBOS	FBS10

38.	Yo! (childrenswear)	COM7
39.	Grantown News	COM25
40.	Red Ruby Blue - VACANT	
41.	Golden Grantown Chinese	LS8
42.	Animal Ark Supplies	RS7
43.	TIC	TOU2
44.	Green Fine Meats	CNV2
45.	Hair @ Mhairi's	RS5
46.	Strathy Offices	OFF1
47.	Beale & Pyper (temporary premises)	COM10
48.	Walkers Shortbread	CNV1
49.	Masson Cairns Solicitors	FBS6
50.	The Bookmark	COM3
51.	The Candy Box	CNV1
52.	Donaldson's Hardware	COM18
53.	Boyd's (Ladies fashion)	COM21
54.	Just Deli…cious (deli)	CNV4
55.	John Ross Funeral Services	FBS7
56.	Grandview House Care Home	N/A
57.	Claymore Bar	LS1
58.	Iain Moir Butchers – VACANT	
59.	Smarty Art Paint Studio	COM8
60.	Scottish Hydro Electrical	COM12
61.	Coo-perative Food Store	CNV3
62.	Thistle Bar	LS1
63.	Tyree House Hotel – VACANT	
64.	Residential	R1
65.	Residential	R1
66.	Residential	R1
67.	Residential	R1
68.	Guest House	LS9
69.	CNPA Offices	OFF1
70.	CNPA Offices	OFF1
71.	CNPA Offices	OFF1
72.	British Association Snowsports Instructors	OFF1
73.	Residential	R1
74.	Garth Hotel	LS9
75.	Shylet Fish	LS8
76.	Shylet Brasserie	LS1
77.	The Studio Photography	COM28
78.	SPAR	CNV1
79.	Macleans Bakery/Coffee Shop	CNV1/LS3
80.	Royal British Legion	LS6
81.	Residential – Stonefield House	R1
82.	Residential	R1
83.	Residential	R1
84.	Grant Arms Hotel	LS9
85.	Residential	R1
86.	Residential	R1
87.	Residential	R1

88.	Residential	R1
89.	Highland Council Service Point	FBS7

Kingussie

Survey date: 30 June 2010 (RG)

Vitality and Viability Performance Indicators

Indicator	**Factor**	**Total** (where appropriate quoted also as % overall)
Retailer representation (good range of shops)	Multiple (national) retailers	2 *no*
	Independent specialist shops	15 *no*
	Charity/discount Shops (specify)	0
	Range of food shopping (convenience or supermarket)	Score: 4
	Range of shops overall	Score: 4
	Vacant premises rate (occupancy levels)	4 *no*
	Investment by retailers (evidence of improvements etc)	Score: 3
Space in use for different functions (diversity of uses)	offices (financial and professional services) (specify)	5*no*
	Cafés, tearooms, pubs, restaurants	10 *no*
	Community/other facilities (specify)	0
	Essential rural services – post office, banks etc (specify)	2 – bank, post office
	Range and diversity of uses overall	Score: 3
	Vacant premises rate (occupancy levels)	Score: 3
	Investment by users (evidence of improvements etc)	Scores 3
Environmental quality	Appearance of the environment generally	Score: 3
	Sense of place (distinctiveness and local identity)	Score: 3
	Signs of decay, decline and neglect	Score: 3
	Signs of recent investment/improvements	Score: 3
Accessibility	Quality and frequency of public transport	Not known
	Ease of pedestrian movement (including people with mobility difficulties)	Score: 4
	Traffic impact	Score: 2
	Car parking provision	Score: 3
Tourism	Range and quality of attractions (specify)	Score: 2 – TIC only
	Visitor information, signage	Score: 3

Notes and observations: (opportunities for improvements, potential development opportunity sites)
Busy through Traffic, lack or services and facilities, good range of hotels, cafés and guest houses.

SWOT Analysis

Strengths	Opportunities
• Tourist trade, some offices.	• Vacant Sheriff Court building. • Through traffic issues.
Weaknesses	**Threats**
• High Street parking. • Lack of facilities.	• HGV volume, tourism dependent.

Inventory

High Street	Name	Use Class
1.	Highland Council Planning & Building Standards, 100 High Street	Off
2.	Residential	R1
3.	Residential	R1
4.	Residential	R1
5.	Residential	R1
6.	Residential	R1
7.	Bake & Take Café	LS3
8.	Residential	R1
9.	Tool Shop	COM18
10.	Residential	R1
11.	Residential	R1
12.	The Tipsy Laird Hotel (bar & restaurant)	LS9
13.	Residential	R1
14.	Robertson & Co. Solicitors & Estate Agents	FBS6
15.	Residential	R1
16.	Be@Home Internet Shop	COM27
17.	Pam's Coffee Shop	LS3
18.	Residential	R1
19.	Residential	R1
20.	McIntosh Gallery/Flying Carpets	COM2/COM32
21.	Sheriff Court - VACANT	
22.	B&B	LS9
23.	Happy Days Takeaway/Breakfast Bar	LS8
24.	Trading Post Hardware	COM18
25.	Gilly's Kitchen Café	LS3
26.	VACANT	
27.	Residential	R1
28.	VACANT	
29.	Kingussie Chinese Takeaway	LS8
30.	Residential	R1
31.	Gow's Garage	RS14
32.	Co-operative Food Store	CNV3
33.	Residential	R1
34.	Residential	R1
35.	Something Different (furnishers)	COM32
36.	Strathy Offices	OFF1

37.	Café Volanto Takeaway	LS8
38.	P Munro & Co. Accountants	FBS5
39.	Police Station	
40.	Residential	R1
41.	HBOS	FBS10
42.	HBOS	FBS10
43.	Highland Council Offices	OFF1
44.	Allt Gynack Guest House	LS9
45.	Star Hotel (bar & restaurant)	LS9
46.	NK Collection (gifts)	COM8
47.	Post Office	RS10
48.	Service Sports	COM30
49.	Murchie's Grocers of Kingussie	CNV3
50.	Boots Pharamacy	COM6
51.	Country Harvest Florist	COM13
52.	Northern Vacuum Cleaner Services	COM12
53.	Caberfeidh Bookshop/TIC	COM3/TOU2
54.	Caberfeidh Bookshop/TIC	COM3/TOU2
55.	Creativity Gifts	COM8
56.	VACANT	
57.	Riverside Laundrette	RS2
58.	Duke of Gordon Hotel (bar)	LS9
59.	Osprey Hotel	LS9
60.	West End Garage	RS14
61.	Kingussie Primary School	
62.	The Silver Fjord Hotel	LS9
63.	The Paper Shop	COM25
64.	George Gow Butchers	CNV2
65.	King Art Gallery & Frames	COM2
66.	Unisex Salon	RS5

Newtonmore

Survey date: 30 June 2010 (RG)

Vitality and Viability Performance Indicators

Indicator	**Factor**	**Total** (where appropriate quoted also as % overall)
Retailer representation (good range of shops)	Multiple (national) retailers	1 *no*
	Independent specialist shops	4 *no*
	Charity/discount shops (specify)	4 *no*
	Range of food shopping (convenience or supermarket)	Score: 3 – Convenience
	Range of shops overall	2 *no*
	Vacant premises rate (occupancy levels)	3 *no*
	Investment by retailers (evidence of improvements etc)	Score: 3
Space in use for different functions (diversity of uses)	offices (financial and professional services) (specify)	0
	Cafés, tearooms, pubs, restaurants	6 *no*
	Community/other facilities (specify)	1 *no*
	Essential rural services – post office, banks etc (specify)	post office
	Range and diversity of uses overall	Score: 2
	Vacant premises rate (occupancy levels)	Score: 3
	Investment by users (evidence of improvements etc)	Scores: 3
Environmental quality	Appearance of the environment generally	Score: 3
	Sense of place (distinctiveness and local identity)	Score: 3
	Signs of decay, decline and neglect	Score: 3
	Signs of recent investment/improvements	none
Accessibility	Quality and frequency of public transport	Score: 3
	Ease of pedestrian movement (including people with mobility difficulties)	Score: 4
	Traffic impact	Score: 2
	Car parking provision	Score: 2 – parking on Main Road
Tourism	Range and quality of attractions (specify)	Score: 2 – TIC only
	Visitor information, signage	Score: 3

Notes and observations: (opportunities for improvements, potential development opportunity sites)
Parking on south side of Main Street – prohibits traffic and leads to amenity issues, high level of tourist accommodation.

SWOT Analysis

Strengths	Opportunities
• High level of tourist accommodation.	• High level of residential in Main Street. • Diversity of uses.
Weaknesses	**Threats**
• Overly strong tourist focus. • No offices. • No services.	• Strong focus on tourism. • Lack of offices.

Inventory

Main Street	Name	Use Class
1.	Clan Macpherson House and Museum	Tou1
2.	The Glen Hotel (bar & restaurant)	LS9
3.	Harris Tweed and Highland Shop	COM8
4.	Mains House Care Home	
5.	Residential	R1
6.	Residential (former hotel)	R1
7.	Residential	R1
8.	Newtonmore Hostel	LS9
9.	Residential	R1
10.	Residential	R1
11.	VACANT	
12.	Residential	R1
13.	Braeriach Hotel	LS9
14.	Residential	R1
15.	Residential	R1
16.	Residential	R1
17.	Residential	R1
18.	Residential	R1
19.	Residential	R1
20.	Residential	R1
21.	Residential/Mini Mischief (kids clothes)	R1/COM7
22.	Residential	R1
23.	Co-operative Food Store	CNV3
24.	Residential	R1
25.	Residential	R1
26.	Residential	R1
27.	Residential	R1
28.	Newtonmore Crafts/ Café	COM8/LS3
29.	Residential	R1
30.	Residential	R1
31.	VACANT	
32.	Funeral Directors	OFF1
33.	Residential	R1
34.	Pantry Tearooms and Bistro	LS3
35.	Residential	R1
36.	Residential	R1
37.	Residential	R1
38.	Residential	R1

39.	Wildcat Centre	TOU1
40.	Community Hall	
41.	Residential	R1
42.	VACANT	
43.	Toshac's Tea Room	LS3
44.	Residential	R1
45.	Blasta Restaurant	LS10
46.	Blythswood Care Charity Shop	COM5
47.	Residential	R1
48.	Post Office	RS10
49.	Bike Shed	Com9
50.	Main Supply (electrical)	Com11
51.	Newtonmore Primary School	
52.	Strathspey Mountain Hotel	LS9
53.	Residential	R1
54.	Residential	R1
55.	Residential	R1
56.	Balavila Hotel	LS9
57.	Waltzing Waters	TOU1
58.	Maureen Hairdressers	RS5

Appendix 2 - Aberdeen City and Shire employment land audit 2010 (extract)

Appendix 3 - Development Land for Commercial and Industrial Use