

5. SOCIO-ECONOMIC RESOURCES



Photo: Stewart Grant.

5. SOCIO-ECONOMIC RESOURCES

5.1 Introduction

This chapter looks at the current state of the communities and economy of the Park. It is divided into the following sections:

- Population;
- Economy;
- Society;
- Infrastructure;
- Housing.

Data on population, some aspects of the economy and housing is available from the 2001 Census and is capable of close resolution to the Park. The data will not, however, be available in updated form to illustrate trends for a decade.

Some data on the economy is produced annually or more often at ward level, and represents the main opportunity for identifying trends in the medium term. Social health data is developed at ward level on a three to four year basis, and again, will allow medium term trends to be identified.

Relevant trends and monitoring are identified in each section, with comparison to national statistics where possible.

5.2 Population

5.2.1 General

The Park has a small population relative to its area, reflecting the rural character of the region. The population has lower levels of young people, and higher proportions of both older residents and of non-Scottish residents than Scotland as a whole.

The primary source of data on the Park population comes from the 2001 national Census. The Census is carried out every ten years, and the small area statistical data needed to analyse an area such as the Park is produced two or three years later. The next opportunity

to analyse the Park population in relation to the national position will therefore arise in 2012 or 2013.

Population projections provided by the General Register Office for Scotland in December 2005 indicate that if the fertility, mortality and migration of recent years continue within the Park, then:

- The population of the Park will increase by 9 per cent between 2001 and 2025;
- The rate of increase will slow over the projection period;
- The population increase will occur predominantly in the 60+ age groups;
- There will be population decrease in younger age groups;
- Population change will be stimulated by in-migration occurring predominantly in the 40-60 age group, perhaps a reflection that many of those who move to the Park see it as a retirement area;
- The number of households is expected to increase by 19.6 per cent between 2001 and 2016, partly due to an increase in the private household population, but mainly a result of the decrease in the average household size;
- One person households will increase most quickly between 2001 and 2016 (+42.7 per cent) as a result of the increasing elderly population who are most likely to live in such a household;
- The ageing population predicted by these projections will have important planning and policy implications in terms of meeting the needs of an ageing population and encouraging a reduction in the net loss of young adults.

5.2.2 Population Density

The Park is estimated to have a population of some 16,024 people, based on 2001 Census returns. The Park has a much lower population density than Scotland as a whole. Occupying an area of 3,800 square kilometres, or 408,782 hectares, it has a population density of just 0.04 people per hectare. This compares with a Scottish average of 0.65 people per hectare.

5.2.3 Age Distribution

The Park population is more heavily weighted towards the older age groups, 25.8 per cent of the population is 60 years of age or older (20.9 per cent in Scotland as a whole); and 28 per cent is under 25 (31 per cent in Scotland). These figures reflect out-migration by younger people and in-migration of people intending to retire in the Park.

The extreme age profile of Park residents is likely to generate considerable demands for community and social facilities and services from a limited tax base. This has implications for future local government budgets.

5.2.4 Gender

The Park population has broadly the same male-female composition as the Scottish population as a whole, approximately 48 per cent males to 52 per cent females. Females make up a slightly higher percentage of the population in both cases, a fact attributable to greater female longevity.

5.2.5 Ethnic Group

There are two striking characteristics relating to the ethnic composition of the Park population:

- It is overwhelmingly White;
- It contains a very significant 'Other White British' component.

Scotland as a whole has only a 2 per cent non-White population, which is far lower than the corresponding figure for Great Britain. The ethnic composition in the Park is even more extreme, with only one in 200 residents being non-White.

The incidence of 'Other White British' (English, Welsh and Northern Irish) in the Park is two and a half times greater than in the general Scottish population. It accounts for almost one in five residents of the Park. 'Other White' is also proportionately larger than Scotland as a whole.

5.2.6 Occupational Status

Census returns show that the Park population, in comparison to the Scottish average, is more skewed towards the C1 (supervisory, clerical, junior managerial/administrative/professional) and C2 (skilled manual workers) occupational classes, with 50 per cent of the Park population



classified as belonging to these two groups, compared with 41.2 per cent of the Scottish population as a whole.

The Park population has a smaller proportion of workers classified as the highest AB grade. However, the shortfall is perhaps less than might be anticipated, given the relative absence of medium and large employers and limited local demand for specialist services.

The relative proportions of semi-skilled and unskilled workers are around the same as for the Scottish population as a whole. However, the Park does have a lower proportion of individuals in the lowest occupational grade, unemployed or subsisting on other state benefits. This finding is consistent with findings in other rural areas that have not seen the large-scale movement from inactivity into sickness or other benefit that is characteristic of many urban areas in the past decade.

5. SOCIO-ECONOMIC RESOURCES...cont

The occupational make-up of the Park population, combined with a higher than average level of educational attainment, suggests that in common with many other rural areas, a significant number of Park residents may be over-qualified relative to the available work.

5.2.7 Information Gaps – Population

- Forecast demands for community and social facilities and for social services based on projected age profile.

5.3 Economy

5.3.1 General

In addition to the 2001 Census, economic data was collected in the Cairngorms Partnership area in 2003 by the two Enterprise Networks. The Cairngorms National Park Authority has also conducted an economic survey of the effects of tourism within the Park. It is more difficult to relate data from local and national government to the Park, given that the Park falls within four local authority areas.



Photo: Highlands and Islands Enterprise.

The Park population is notably more economically active than the Scottish population as a whole, a characteristic of rural areas, with a high level of self-employment. There is also a higher degree of gender segregation relating to types and sectors of employment within the Park. The economic base of the Park is relatively narrow, with the public sector and tourism-related industries underpinning a broader range of activity. Agriculture and estate-related activity,

such as stalking and shooting, are smaller sectors in terms of economic and employment contributions, but of critical importance to the management of the Park and supporting employment outside the main settlements.

The Census, which is updated every ten years, provides basic data on aspects of economic activity and employment and may be closely tied to the Park area. The Annual Business Inquiry provides an annual picture of employment and economic activity. The administrative boundaries used in the Annual Business Inquiry cut across the Park's boundary and cover a wider geographical area than the Park itself. Agricultural data is drawn from the annual agricultural census – again the administrative boundaries used in its compilation extend beyond the Park. There is no regular published source of data on sporting estates, despite their importance to the Park.

5.3.2 Labour Market Economic Activity

The Park contains a higher proportion of economically active people (70 per cent) than Scotland as a whole (65 per cent), and a higher number of these are self-employed. These findings are typical of rural Scotland, although the level of self-employment is notably high at almost a quarter of those who are working. This compares with just over a tenth in Scotland as a whole.

At just over 50 per cent, the proportion of people working as employees is comparable with that at the Scottish level, but the Park population has a notably higher level of part-time employment.

The proportion of people designated as permanently sick/disabled in the Park is half of that for the Scottish population as a whole, notwithstanding the greater average age of Park residents.



Gender

It appears that a segregation of roles by gender along traditional lines is being sustained in the Park to a greater degree than in the national population, whether due to cultural factors or barriers such as access to childcare services. The number of economically active males outstrips the number of females to a degree which contrasts with national level data.

There is also a striking gender segregation among people with employed status, with the majority of males in full-time employment, whereas female employees are more evenly divided between full and part-time employment. Women are also more likely to be economically inactive in order to look after children and family than men, to a degree which is considerably greater than at national level. Rural isolation leading to lack of access to suitable part-time jobs and the absence of child support could both be contributing factors.

Qualifications

The Park population is slightly better qualified than the Scottish population as a whole. In 2001, 69.3 per cent of people in the Park held some kind of qualification, compared with 66.9 per cent in Scotland as a whole. There is a certain amount of polarisation within those holding qualifications. More of the Park population hold Group 1 ('O' Grade, Standard Grade, SVQ Level 1 or 2) qualifications, and fewer hold Groups 2 ('H' Grade, SVQ Level 3) and 3 (HNC, HND, SVQ Level 4). However, the most striking disparity is between the proportion of the Park population with a Group 4 qualification (first degree, higher degree, professional qualification) and Scotland as a whole. At this level, the Park population has significantly higher educational attainment (22.7 per cent) compared with the Scottish average (19.5 per cent).

Hours Worked

A slightly higher proportion of the Park population works hours that correspond to the definition of part-time working (2001 Census). Within the part-time work category, hours worked are comparable with that of the Scottish population as a whole. For full-time workers within the Park, hours worked tend to be longer than in Scotland as a whole. Almost a quarter of employed residents of the Park work more than 48 hours per week, compared with 15 per cent at the Scottish level.

5.3.3 Industry and Employment Structure

The pattern of employment shown by the 2001 Census reveals an economy which is relatively narrow compared with that for Scotland as a whole. There are a small number of sectors that are over-represented and a larger number where representation is below average.

However, this pattern is common to many rural areas, including much of the Highlands and Islands. A higher proportion of the Park population (5.7 per cent) are employed in the primary industries of agriculture, hunting and forestry, as would be expected in a more rural area. The numbers are still low in absolute terms, although these are areas where self-employment is likely to account for a significant proportion of the total.

Employment in fishing (which includes both freshwater and marine) is low (0.1 per cent), perhaps surprisingly given the role of fishing in the local economy. Again, this may be an area where self-employment plays an important role.

Manufacturing, substantially skewed towards brewing and distilling, is of a similar scale to primary activities and has grown in recent years, counter to the trend at national level.

The Services sector accounts for the largest proportion of jobs.

5. SOCIO-ECONOMIC RESOURCES...cont

Employment in hotels and restaurants in the Park (19.4 per cent) is much higher than in Scotland as a whole (5.7 per cent), reflecting the relative importance of the tourism sector.

Employment in public services, as represented by public administration, education, and health and social work, is significantly lower in the Park (20.1 per cent) than in Scotland as a whole (26.7 per cent). This disparity is likely to reflect the pattern of local government and educational provision in the area surrounding the Park,

which has relatively few of these institutions located within the Park boundary.

The Other employment category has a much higher proportion of respondents within the Park than Scotland as a whole, representing forms of employment not captured by the Standard Industrial Classification. The Other category includes community, social and personal service activities, as well as private households with employed persons.

Table 5.3.3: Employment by sector

Sector	Park (No.)	Park %	Scotland (No.)	Scotland %	Park Deviation from Scotland (%)
Agriculture, hunting and forestry	442	5.7	48,391	2.1	3.6
Fishing	11	0.1	6,784	0.3	-0.2
Mining and quarrying	108	1.4	28,040	1.2	0.2
Manufacturing	566	7.2	299,167	13.2	-6.0
Electricity, gas and water supply	44	0.6	22,613	1.0	-0.4
Construction	629	8.0	169,144	7.5	0.5
Wholesale and retail trade, repairs	983	12.6	325,398	14.4	-1.8
Hotels and restaurants	1,515	19.4	129,798	5.7	13.7
Transport, storage and communications	396	5.1	151,506	6.7	-1.6
Financial intermediaries	94	1.2	104,923	4.6	-3.4
Real estate, renting and business activities	704	9.0	252,585	11.2	-2.2
Public admin, defence, social security	320	4.1	158,064	7.0	-2.9
Education	489	6.3	165,074	7.3	-1.0
Health and social work	758	9.7	279,720	12.4	-2.7
Other	765	9.8	120,074	5.3	4.5

Source: 2001 Census, General Register Office for Scotland.

Seasonality and Pay Rates

Agricultural surveys and the nature of tourism in the Park point towards a high level of seasonal employment in the area. Many residents have more than one job over the course of a year. This has implications for career paths and training needs for residents, and skills gaps for employers.

Traditionally, sectors such as agriculture and tourism have low pay rates and the Park is no exception, with the effect magnified locally due to the over-reliance on these sectors.

Gender Segregation

A high level of gender segregation by sector was identified, considerably more than at national level. Employment in the primary industries of agriculture, hunting, forestry, fishing and mining and quarrying was predominately male. Manufacturing, construction and electricity, and gas and water supply also had a preponderance of male workers. Women formed a higher proportion of workers in the wholesale and retail trade and in the hotels and restaurants sector. Female employment was also greater in public sector employment, as a result of higher numbers of women working in the education and social work sectors.

Trends in Employment by Industry

Between 1998 and 2002, the most significant increases in employment occurred within primary education (188 jobs), secondary education (154 jobs), specialised stores (58 jobs), fire service activities (47 jobs), other provision of lodgings (39 jobs) and other recreational activities (35 jobs).

The role of the public sector in employment growth is striking, with more minor growth attributable to some tourism-related and retailing sub-sectors.

The most significant employment losses in the Park between 1998 and 2002 occurred within hotels with a restaurant (-120 jobs), restaurants (-94 jobs), social work activities (-90 jobs), general public service activities (-69 jobs), catering (-63 jobs) and general construction of buildings (-53 jobs).

The fragility of the tourism industry is reflected in these figures, which show that there were 277 less jobs in the Hotels, Restaurants and Catering sub-sectors. However, there remained 1,278 Hotel jobs in the Park in December 2002, reflecting the continued importance of tourism to the local economy.

Recent tourism economic figures show that tourism employment in the Park sits at around 5,000, with minor fluctuations between 2002 and 2004.

5.3.4 Agriculture

General

The primary source of data on agriculture in Scotland is from the annual agricultural census, compiled by the Scottish Executive Environment and Rural Affairs Department. The agricultural census analyses agricultural production at national level, at 14 regional levels and then at parish level. The Cairngorms National Park is covered by 15 parishes, although six of these have half or more of their area outside the Park.

Structure and Tenure

The Park incorporates some traditionally strong hill and upland farming areas, such as Upper Deeside, Strathspey, Tomintoul and Glenlivet, with climate and soil conditions allowing for cropping in the small areas of better land. This



farming activity is associated with large areas of moorland, which also play an important role in the sporting economy. Much of the land is in the ownership of large estates and is either farmed in-hand or tenanted. Major landowners include private individuals, charities, public agencies, other organisations and The Crown Estate. There are also 105 registered croft holdings in the Park, all within Badenoch and

5. SOCIO-ECONOMIC RESOURCES...cont

Strathspey. Average farm size is relatively high, exceeding 600 hectares, compared with a Scottish average of 122 hectares. It is common, like elsewhere, for owners to take more land into in-hand management so as to consolidate units into larger holdings in response to economic and policy factors.

Although holdings are larger on average than the Scottish norm, productivity is likely to be relatively low as a result of the activities undertaken and their limitations in terms of income generation. The 1998 Scottish Agricultural College Land Use and Economic Activity in Possible National Park Areas study estimated that 30 per cent of the total agricultural output of the area was direct subsidy or market support, and that 86 per cent of this subsidy related to livestock. Both proportions significantly exceed the Scottish average.

Within the Park there is a strong trend towards farming being a part-time occupation. The agricultural census data points to less than 600 people involved in farming within the Park, with just over 300 of these full-time.

Land-use and Agricultural Activity

The principal farm enterprises are normally a mix of beef cows and breeding ewes, with some of the better units able to finish stock as well as produce arable crops. Principal livestock outputs are store calves and lambs, although as in other areas more farmers are now seeking to add value through finishing stock. A small number of farms in the straths grow more substantial areas of crop, such as malting barley for the distilling trade.

Agricultural land-use within the Park is dominated by rough grazing. The small area in crop cultivation is heavily biased towards production of spring barley, likely to be mainly for malting purposes, with the vast majority of the remainder given over to fodder crops.



Livestock within the Park is dominated by sheep (189,000) and cattle (28,000), which sustained declines of 15 per cent and 10 per cent respectively between 1990 and 2003, reflecting the employment trend in agriculture. A further striking trend is the 70 per cent growth in the number of horses used for leisure purposes in this period, although the total remained relatively small in absolute terms at just under 300.

More details of the natural and cultural heritage influences of land-use are given in the Natural and Cultural Resources chapters.

5.3.5 Estates

General

The most recent source of information on estates within the Park is the 1999 study on land owners in the Cairngorms Partnership area (a larger area than the Park). While the role of estates in the Cairngorms economy is clearly significant, particularly in the most remote and rural areas of the Park, existing data sources are not able to identify the type and extent of estate-related economic activity. It would require a dedicated research effort to canvass the estates to determine their current economic contribution and future prospects.

Employment

The Cairngorms Partnership Survey identified 422 full-time jobs, and 126 full-time equivalent part-time jobs based on estates. Of these, almost half were linked to fieldsports (red and roe deer stalking, high and low-ground shooting and fishing). While 46 of the respondents were directly involved in fieldsports, the remaining 14 had no employment in this activity because the sporting rights were let or the estate was used predominately for another purpose.

Agricultural employment on in-hand farms was 41 full-time equivalent staff. A total of 238 farms were owned by the respondents, some 111,888 hectares in all. The extent to which farms and land were let was not stated.

No other employment figures were published for other activities such as nature conservation, commerce and tourism, outdoor recreation and access and business management.

It is possible that some of the employment generated by the estates goes to workers who live outside the Park boundary. Some estate-related employment may also be recorded as self-employment.

Investment

Estates are a significant focus of investment and of investment subsidy within the Park. The Cairngorms Partnership Survey reported that in 1998/99 a total of £17.4 million was invested, of which £1.7 million (approximately 10 per cent) was through grant assistance. This investment is distributed across a range of activities including woodlands, fieldsports, community access facilities and housing.

Estate Housing

Survey respondents provided over 1,000 homes during the period 1998/1999. Of these, 263 were tied homes, 235 were within farm tenancies, 434 were let as private residences and 69 were let for other purposes.

Half of the respondents reported a policy of favouring local needs when allocating housing, either to those who worked locally or had local connections. Some tied houses were provided rent-free for employees.

5.3.6 Information Gaps – Economy

- Reason for segregation of roles by gender;
- Reason for gender segregation among employed people in relation to full/part-time work;

- Comprehensive analysis of numbers employed in agriculture, hunting, forestry and fishing;
- Type and extent of estate-related economic activity, employment and investment;
- Employment figures for nature conservation, commerce and tourism, outdoor recreation and access and business management sectors.

5.4 Society

5.4.1 General

The main source of social information covering the Park is the Scottish Index of Multiple Deprivation. Based on earlier work in England and Wales, the Index is an attempt to measure relative deprivation at local level, using a number of measurements of social well-being, including income, employment and education.

Other aspects of society, such as social capital and social infrastructure, are harder to measure, and are not the subject of regularly published analyses.

5.4.2 Measures of Deprivation

In previous years, data for the Scottish Index of Multiple Deprivation was collected at ward level. The Park is covered by the following wards: Glenlivet; Upper Deeside; Donside and Cromar; Kirriemuir West; Kirriemuir East; Brechin North Esk; Grantown-on-Spey; Strathspey North East; Strathspey South; Badenoch West; Badenoch East.

Table 5.4.2 shows the relative ranking of the Park wards in the Scottish context.

Overall, the Scottish Index of Multiple Deprivation suggests that the Park population enjoys a relatively good quality of life, although access to services is less good than in many areas of Scotland.

5. SOCIO-ECONOMIC RESOURCES...cont

Table 5.4.2: Park wards in the Scottish Index of Multiple Deprivation 2003

Category	Placing
Income deprivation	Good: top 50% of wards (with exception of Kirriemuir East)
Employment	Good: top 50% of wards
Education, skills and training	Mixed: 3 out of 11 wards are in the lowest 50%, although none is in the lowest 25% of wards in Scotland
Health	Good: all but 2 wards in the best 25% in Scotland
Accessibility	Poor: all but 1 ward are in Scotland's worst 25%
Overall rating	Good: 3 wards in highest quartile, remainder in second highest quartile

Source: Scottish Executive Scottish Index of Multiple Deprivation 2003

5.4.3 Social Capital

'Social capital', according to the definition favoured by the Scottish Council for Voluntary Organisations is the "social connections and its attendant norms and trust" that bind society together. As such, this form of capital cannot be directly measured or quantified in an objective fashion.

The Park has a higher number of voluntary organisations per 1,000 people than the Scottish average of 5.08 organisations. There are significant differences between the local authority areas, with Highland having a higher number of organisations than the other three local authority areas. Moray, at 5.44 organisations per 1,000 people, comes closest to the national average. However, these figures primarily relate to larger organisations with charitable status.

The Scottish Council for Voluntary Organisations notes that rural council areas typically have proportionately higher numbers of voluntary organisations than urban areas. The higher number of organisations in Highland may, in part, be a product of a larger council area requiring a larger number of organisations to meet local needs. The total voluntary effort in a council area may not therefore be directly linked to the number of organisations. Voluntary organisations in rural areas tend to receive substantially less funding on average than their urban counterparts, although the reasons for this difference require further exploration.

5.4.4 Social Infrastructure

There is no published data source for physical infrastructure used for community purposes. Facilities may also be in private hands or used on an informal basis, making it harder to identify these structures.

The Park population has relatively few community centres owned directly by local authorities providing social, educational and recreational facilities for the community. However, the Park population may be being served in this regard



by community centres located outside the Park boundary. For example, Tomintoul is served by the Speyside Community Centre located in Aberlour. Village halls also provide similar facilities in many settlements.

Village and town halls are present in almost all the main Park settlements. Village halls have an important role as a focal point for community

activity and access to services. The Park appears to be well served in terms of numbers of village halls, but the condition, adequacy of space and facilities, and security of funding arrangements vary.

The provision of library facilities in the Park is greater, with six of the 13 main settlements having some form of library provision. Outlying areas in the Park may be served by mobile libraries, but these will not provide the physical facilities, including meeting space and internet facilities, that fixed libraries are able to provide.

5.4.5 Childcare

Childcare provision is an important element in enabling families to access employment and educational opportunities, and is particularly important for mothers seeking to re-enter the workforce.

The national ChildcareLink service identifies a range of childcare services in the Park, although this is clearly more developed and formalised in



Photo: Highlands and Islands Enterprise.

some settlements than in others. The data available shows that childminding and nursery provision are the most prominent services, with very limited out-of-school-hours provision. Childminding is increasingly important, but childminders are being lost due to increased regulation. This has led to a larger unregulated market. Further research is required to determine whether existing provision is

adequate to meet needs and how childcare professionals can be better supported.

5.4.6 Young People

There is no published data on the position of young people in the Park and their needs. The four local authorities each have their own approach to identifying and working to meet the needs of young people.

The Dialogue Youth Initiative, supported by the Scottish Executive, operates within each local authority area canvassing young people on issues and needs and will be used in developing appropriate services.

5.4.7 Crime and Community Safety

The Park is covered by the Grampian Police and Northern Constabulary areas, which do not report at a more local level, so data on crime and community safety at a Park level is limited.

The Northern Constabulary area has the most rural population of any police area in Scotland,



Photo: Northern Constabulary.

and the lowest recorded crime rate. The Grampian Police area, which takes in the city of Aberdeen, has the third lowest recorded crime rate of the eight Scottish police areas. This suggests that the crime rate within the Park is also likely to be relatively low.

5. SOCIO-ECONOMIC RESOURCES...cont

Recorded crime is not the sole measure of the impact of crime on society. Not all crimes are reported to or detected by the police, and reporting and detection levels are independent of crime rates. Surveys have shown that the rate of crime experienced by people can be much higher than the level of crime reported.

5.4.8 Information Gaps – Society

- Updated Scottish Index of Multiple Deprivation findings;
- Condition, adequacy of space and facilities, and security of funding arrangements in relation to village halls;
- Whether existing childcare provision is adequate to meet needs and how childcare professionals can be better supported;
- Crime statistics within the Park.

5.5 Infrastructure

5.5.1 General

The Park is relatively well provided with transport links, although communications within the Park are less well-developed. Limited data on road usage is available from the relevant local authorities.

Energy generation, waste disposal, and the recycling of waste largely take place outside the Park.

Housing supply in the Park differs from that of Scotland as a whole, being characterised by a higher level of large, detached properties, more vacant properties and a much higher level of second home and holiday accommodation.

5.5.2 Transport Services

The Park has relatively good transport infrastructure and services compared with many other rural areas of Scotland. Three A class roads connect the Park with Inverness, Central Scotland, Aberdeenshire, and Lowland Perth, Kinross and Angus. Networks of B class roads

provide access to local communities. However, the road link between the Strathspey and Deeside areas is less well-developed. The trunk roads are sometimes subject to local congestion as a result of grouping of Heavy Goods Vehicles



Photo: Stewart Grant.

and caravans impeding the passage of faster traffic, particularly in the summer months. Household ownership of cars and vans is significantly higher within the Park than in Scotland as a whole.

The Inverness-Perth railway line runs through the Park, with stations at Carrbridge, Aviemore, Kingussie, Newtonmore and Dalwhinnie. Of these, Aviemore and Kingussie are regularly served on weekdays and Saturdays, but service at the other stations is more intermittent.

Bus services provide the most extensive form of public transport within the Park and to regional and national destinations. For most of the main settlements bus services provide a viable basis for travel to work for the normal working day in Inverness (from Badenoch and Strathspey) and Aberdeen (from Deeside). The combination of trunk and local services also provides reasonably frequent internal public transport where the main settlements are concerned.

More remote settlements are served more sparsely, considerably so in some cases.

Inter-community bus services are poor when not travelling directly into town hubs such as Aviemore. There is no cross-Park service between Aviemore and Deeside or Braemar to Blairgowrie, or any direct service from the Angus Glens to the rest of the Park. Sunday services on most routes are less frequent.

5.5.3 Telecommunications

Fixed telephony is near universal. Mobile phone coverage is reported to be good in the majority of the Park's major settlements. Coverage outside of the main settlements is much more variable, and reception in much of the Park will depend on the topography at the user's location. Lack of mobile phone reception in areas such as the Angus Glens can further isolate remote rural communities.

Access to broadband internet services via British Telecommunications' telephone lines is improving, with all major settlements expected to have their local exchanges upgraded to handle broadband traffic by 2006. Issues with providing broadband access to remote households may still remain.

5.5.4 Energy

There is no nationally significant energy generation within the Park. Residents obtain their electricity from the National Grid, which in turn draws upon a variety of sources of power generation – nuclear, gas, coal, hydro-electric and wind turbines outside the Park.

There are few examples of renewable energy within the Park, although there are some biomass boilers in use, along with scattered domestic solar and wind turbine systems.

The absence of mains gas for many householders means that Park residents depend on electricity for cooking and heating and/or use of bottled gas or oil, both of which must travel by road.

The growing expense of oil-fired central heating is likely to lead to more demand for other forms of energy generation.

5.5.5 Waste Management and Disposal

Responsibility for waste disposal lies with the four local authorities within which the Park sits. Waste disposal and recycling arrangements vary according to each local authority's management approach and facilities.

In the Park, The Highland Council operates the Granish landfill site, just north of Aviemore. This landfill will take waste from both the Park and the surrounding area. The other local authorities have their landfill sites outside the Park.

Some community waste management initiatives exist. The Real Highland Nappy Campaign is based at Nethy Bridge, Strathspey Waste Action Network is active and there is growing interest from local authorities in providing domestic recycling pick-up. Commercial options remain absent.

5.5.6 Recycling Facilities

The availability of recycling facilities depends on each local authority's approach. For the most part, these facilities serve as collection points for easily recyclable waste, which is then transferred in bulk to be reprocessed. Highland, Aberdeenshire, and Moray Councils operate a number of recyclable waste 'bring' sites within the Park, while Highland and Angus Councils are establishing a kerb-side collection service.

5. SOCIO-ECONOMIC RESOURCES...cont

5.6 Housing

5.6.1 Demographic Background

Based on current analysis of the housing system, it is evident that there are various housing challenges facing the Park in the future. A summary of population projections provided by the General Register Office for Scotland in December 2005 is outlined in section 5.2. Overall projections show a growth in one person households and an ageing population.

5.6.2 Housing Stock and Tenure

The housing system has changed considerably over the past 10 to 15 years. There has been significant growth in the owner occupied sector,

two-fold. Firstly, the demand for second or holiday homes in an attractive rural environment exerts an upward pressure on prices. Secondly, the stock is by definition ineffective in its ability to meet permanent housing demand or need.

Within the occupied stock a relatively high proportion of owner occupiers own their properties outright when compared with the Scottish average. House prices have risen significantly in the owner occupied sector in recent years.

The private rented sector is relatively large and more diverse when compared with other areas of Scotland, with a significant proportion of tied housing, emphasising the link between employment and housing. It may also be viewed as a more permanent housing solution by some households, when examined in the context of the traditional view of the sector as a transient housing solution. At the same time expressed demand for social rented housing tends to indicate that a large number of households in the private rented sector are seeking social rented housing. The ability to influence and ensure that the private rented sector plays an effective role in the Park's housing system is perhaps of more significance within the Park than in many other parts of Scotland.

and a slight decline in the private rented sector (although numerically there has not been much change). This is coupled with a decline in the social rented sector both numerically and as a proportion of all housing stock. This has been primarily due to Right to Buy and a low rate of new build in the affordable housing sector when compared with the private sector.

The overall supply of housing is affected by the significant proportion of the housing stock that is second or holiday homes. Approximately 1,800 homes are in this category, representing just under 20 per cent of the total housing stock. The main impact on the housing system is

The local authority housing sector has declined in both absolute and proportionate terms, whereas the registered social landlord sector has increased slightly. On average, 42 properties have been sold every year through Right to Buy over the past 20 years. The registered social landlord sector has grown over the past 10 to 15 years to meet a wider range of particular needs and now has a more diverse range of tenants in terms of household type. There is a significant level of expressed demand and need through both the local authority housing lists and available homelessness figures.



The total current number of applicants for housing is circa 550-600. The total annual lets are estimated at between 70 and 80 across both the local authority and registered social landlord sectors.

5.6.3 House Prices and Affordability

The estimated mean and median household weekly incomes within the Park are £461 and £391 respectively. In general, these figures are lower than the corresponding ones for the wider local authority areas. The overall threshold entry price to access the housing market is estimated at £83,554 for the Park, which is higher than in the surrounding areas.

The percentage of younger (<35 years) households able to buy a property in the market, based on threshold prices, is estimated at 38 per cent. Analysis shows that, within the Park, affordability is particularly low in the Aviemore area, and also quite low in the Deeside and Tomintoul areas. It is slightly higher in the Grantown and Kingussie areas.

A housing needs analysis shows that the net need per annum is 132 across the Park. This ranges from 10 in the Tomintoul area to 54 in the Aviemore area. This is a fairly large number equivalent to all the current completions projected through the planning system. Numerically, the needs are greatest in the Aviemore area, but relative to the existing number of households they are also proportionately high in Tomintoul.

5.6.4 Housing Development

In recent years house completions have been rising, although these are mainly concentrated in the private sector. Current projections anticipate approximately 115 completions per annum, with a greater proportion of affordable housing within this target. However, significant potential constraints, primarily in the form of infrastructure, have been identified.



Photo: Highlands and Islands Enterprise.

6. APPENDICES

Appendix 1

Public Bodies Consulted

In addition to a number of private organisations and individuals, the following public bodies were consulted on the Draft State of the Park Report:

Aberdeenshire Council	Royal Commission on Ancient and Historical Monuments of Scotland
Angus Council	Scottish Enterprise Grampian
Communities Scotland	Scottish Enterprise Tayside
Crofters Commission	Scottish Environment Protection Agency
Deer Commission for Scotland	Scottish Executive Environment and Rural Affairs Department
Forestry Commission Scotland	Scottish Natural Heritage
Highland Council	Scottish Water
Highlands and Islands Enterprise	
Historic Scotland	
Moray Council	

Appendix 2 – Glossary

NATURAL RESOURCES

Acidification	Increased levels of acid in soil and water.
Alluvial fans	A fan-shaped deposit formed where a fast flowing stream slows and deposits its sediment, typically at the exit of a valley onto a flatter plain.
Alpine and sub-alpine soils	A grouping of sandy and gravelly soils confined to exposed high ground which are subject to wet, very cold climatic conditions.
Arctic-alpine	Plants with a distribution that includes the Arctic and more southerly mountain ranges such as the Alps.
Blanket bog	An area of blanket mire where the water supply is derived purely from precipitation.
Blanket mire	A waterlogged, peatland habitat that develops over gentle slopes in the uplands, in cool areas of high rainfall. This results in very slow rate of decomposition and plant remains accumulate as peat below the living vegetation.
Block scree	Debris in the form of boulders that has been eroded from steep slopes or cliff faces.
Boreal woodlands	Forests composed mainly of conifers which grow in a belt across northern North America and Eurasia.
Breached watersheds/watershed breaches	A glacial valley that cuts across a pre-glacial watershed. The Lairig Ghru is a classic example which breaches the Spey-Dee valley watershed.
Bryophytes	A major group of plants that includes mosses, horn worts and liverworts.
Calcareous	Describes soil, or grassland growing on soil, which is rich in calcium carbonate. In the Cairngorms, such conditions are commonly associated with outcrops of dolerite and limestone.
Caledonian Pinewood Inventory	A database, produced by the Forestry Commission, which maps and describes 84 ancient Scots pine-dominated woodlands in Scotland.

Corridor link/wildlife corridor	A connected habitat which allows movement of animals between areas.
Corries	Large circular hollows that are formed by glacial activity, usually on north-east facing mountainsides.
Debris flows	The down-slope flow of poorly-sorted sediment such as stones and boulders.
Deciduous woodlands	Tree species that do not retain their leaves year-round.
Depression	An area of low pressure in the atmosphere.
Ecosystems	Communities of organisms and the environments they live in.
Eutrophication	Nutrient enrichment of water bodies.
Genotypes	The inheritable, genetic code of an organism.
Geomorphology	The study of landforms.
Glaciofluvial deposits	Material deposited by water from glaciers.
Gleyed soils	Clay-rich soils where drainage is disrupted.
Hummocky moraines	Deposits from glaciation that form small mounds.
Igneous intrusions	Granite rock resulting from the cooling of magma beneath the ground. The resulting rock is very resistant to weathering and is often left upstanding when surrounding rocks are eroded.
Impervious soil layers	Soil layers through which water cannot pass.
Inter-glacials	The periods of time in between glaciations.
Leached soils	Soils which have had most of their soluble content washed away by high levels of precipitation.
Low alpine heaths	Heaths that lie immediately above the treeline and are dominated by shrubs such as heather, cowberry and blueberry.
Massif	A coherent area of high ground.
Meanders	Winding and turning river bends.
Meltwater channels	Channels created by the flow of water melting from a glacier.
Metamorphosed sedimentary rocks	Rocks that have been subject to change as a result of volcanic or other processes in the time following their original deposition.
Minerotrophic fens	Peatlands that receive water and nutrients from ground water as well as from rainfall.
Monoculture production	Production of a single species.
Montane soils	Soils characteristic of areas above the natural treeline.
Mountain/montane habitat	Habitat above the natural treeline.
Muirburn	Managed burning of heather as part of a moorland management system.
Mycorrhizal fungi	Mushrooms which grow around the roots of plants providing minerals and water from the soil to the host plant in exchange for sugars.
Oligotrophic rivers	Rivers which are low in nutrients.
Palaeontology	The study of prehistoric animals and plants through the analysis of fossils.
Peri-glacial landforms	Ground features that formed on the edge of glaciers or glaciated areas.
Ploughing boulders	Large rocks that move down slope through the surrounding soil, leaving a vegetated furrow behind and forming a turf-covered rampart ahead.
Podzols/podzolic	Soil type that develops in temperate to cold, moist climates under coniferous or heath vegetation.
Precipitation	Rain, mist and snow.

Ranker soils	Thin, peaty soils in mountainous areas which overlie free-draining, siliceous material.
Riffles	Shallow sections of a stream or river where sand and gravel have accumulated to create a faster current with a rougher surface.
Roches moutonnées	Rock hills shaped by the passage of ice to give a smooth up-stream side and a steeper, rougher surface on the downstream side.
Saproxyllic species	Any species that depend on dead or decaying wood.
Scree	Loose rock on a hillside.
Solifluction features	Features resulting from movement of soils.
Taxon, (plural: Taxa)	A term used to denote any group or rank in the classification of organisms, e.g. class, order, family.
Terraces	Surfaces preserved on flood plains from when the river flowed at a higher altitude.
Loch Lomond readvance	A short, but cold, climatic period lasting from 10-11,000 years ago when corrie glaciers re-formed in the Cairngorms.
Tors	Upstanding rock features, usually granite, from which the surrounding rock has been eroded to leave a skyline feature.
Vascular plants	Complex plants with conductive tissue.

CULTURAL RESOURCES

Crowstepped gables	Stepped stone gable ends, typical of many buildings in the area.
Head Dyke	Dyke (dry stone wall) separating cultivated land from hill land.
Iron Age	Chronological period c. 700BC to c.500 AD characterised by the use of iron as the main metal.
Liming	Process of applying lime to fields to reduce acidity.
Mesolithic	Chronological period c.7000 to 4000BC during which humans hunted and fished.
Neolithic	Chronological period c.4000 BC to 2500 BC characterised by the development of agriculture and settlement.
Pinetums	Designed plantations of coniferous trees generally specimen trees and exotic species.
Policies	The designed park-land surrounding a country house.
Ridged field systems	Cultivation on raised ridges.
Sculpted stones	Decorated carved symbol stones and cross slabs.
Sheepwalks	Area of hill ground used for extensive sheep grazing.
Timber stockades	Defensive barrier of stakes placed around a building.
Upstanding archaeology	Archaeological remains above ground.
Vernacular	Local architectural style in which ordinary houses are built.
Waulking	Process of washing and shrinking of locally made cloth.

VISITOR RESOURCES

Back country skiing	Skiing outside the boundaries of a managed ski area.
Baseline dataset/information	A value or starting point against which progress is measured.
Bothies	An open building used for temporary shelter.
Coarse fishing	Fishing for freshwater fish that are not of the salmon family.
Corbetts	Hills in Scotland between 2,500 and 2,999 feet in height.
Demand responsive transport	Public transport which is co-ordinated to meet demand, rather than fixed timetables.

Erratics	A boulder transported and deposited by a glacier, being different to the bedrock upon which it is sitting. Erratics are useful indicators of patterns of former ice flow.
Esker	A long, narrow ridge, often winding, which marks the former location of a glacial tunnel.
Green Tourism Business Scheme	VisitScotland's environmental accreditation scheme for Scottish tourism businesses. The scheme helps tourism businesses save money by improving their environmental performance and also helps protect Scotland's environment.
Howffs	Shelters used by hillwalkers.
Kettle holes	A hollow created when buried blocks of glacier ice melt.
Montane scrub	The shrub habitat which forms an understorey within native woodland and continues up through the treeline, where tree species become stunted, and beyond, into the sub-alpine zone.
Moraines	Landforms created at the margins of glaciers by the melt-out of debris from the glacier and by the bulldozing action of the ice.
Munros	Hills in Scotland over 3,000 feet in height.
Promoted paths	Paths which are advertised and managed by land managers, environmental organisations and access organisations.
Rights of Way	A route to which the public have an accepted right of access.
Tactile maps	Maps incorporating Braille for use by the blind and partially sighted.
Tactile waymarking symbols	Waymarking symbols incorporating Braille for use by the blind and partially sighted.

SOCIO-ECONOMIC RESOURCES

Affordable housing	Housing of reasonable quality affordable to people on modest incomes. If the market cannot provide housing in an area which is affordable to people subsidised, affordable housing may need to be made available at a cost below market value.
Biomass boilers	Boilers which use renewable fuels, such as wood chips.
Direct subsidy	Direct payments to the agriculture industry which are linked to production or rural development.
Expressed demand/expressed need	Views of local residents and organisations on the demand or need for housing in an area.
House completions	New dwellings completed.
Housing needs analysis	Analysis which seeks to understand housing need and which can be carried out to the level of an individual or household over a geographical area or for a specific community of place or interest.
Housing stock	The total number of dwellings in a given area.
Housing tenure	The legal basis on which a house is occupied, eg owned, rented, etc.
In-hand farm management/in-hand farms	Farms managed by owners rather than tenants.
Market support	Intervention purchases and import tariffs which affect the accounts for the agriculture industry through their impact on market prices.
Mean household weekly income	The sum total of weekly household incomes divided by the number under consideration.
Median household weekly income	The midpoint in a range of household weekly incomes.

Owner occupied sector	Housing which is lived in by the owners.
Primary industry	Agriculture, hunting and forestry.
Private rented housing	Housing for rent provided by private developers or other commercial organisations.
Registered Social Landlord	A landlord registered with Communities Scotland and providing housing for let and other associated services, but not trading for profit. The commonest form of registered social landlord in Scotland is a housing association.
Right to Buy	Under Right to Buy and now the Modernised Right to Buy scheme, council tenants can buy their home at a price lower than the full market value.
Scottish Index of Multiple Deprivation	An attempt to measure relative deprivation at local level, using a number of measurements of social well-being, eg income, employment, education, etc. Since completing the research for this report, the Scottish Index of Multiple Deprivation has been updated and is now based on the small area statistical geography of data zones and on 31 indicators covering specific aspects of deprivation, ie Current Income, Employment, Health, Education, Housing and Access.
Social capital	Social connections binding society's institutions, relationships and norms together.
Social infrastructure	Physical structures used for community purposes and providing social, educational and recreational facilities.
Social rented housing	Housing provided by registered social landlords, local authorities and other social housing providers for general and special needs.
Standard Industrial Classification	First introduced into the United Kingdom in 1948 for use in classifying business establishments and other statistical units by type of economic activity. The classification provides a framework and a common structure for the collection, tabulation, presentation and analysis of data. It underpins the collection by the Office for National Statistics of all the United Kingdom's official statistics on business and industry.
Store calves	Calves grown slowly to just below their potential, which are then bought and made ready for slaughter by 'Finishers' (see To Finish Stock).
Threshold entry price	Point on housing price scale below which you cannot enter the housing market.
To finish stock	The feeding of cattle or sheep at a higher rate of growth which increases muscle on the animal and makes it acceptable for slaughter.



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