



Topic: Housing

Engagement version – August 2025

Requirements addressed in this section

Table 1 Information required by the Town and Country Planning (Scotland) Act 1997, as amended, regarding the issue addressed in this section.

Section	Requirement
Section 15(1)(A)	The local development plan must also include targets for meeting the housing needs of people living in the part of the district to which it relates.
Section 15(5)(c)	The size, composition, health and distribution of the population of the district,
Section 15(5)(ca)	The housing needs of the population of the area, including, in particular, the needs of persons undertaking further and higher education, older people and disabled people,
Section 15(5)(cb)	The availability of land in the district for housing, including for older people and disabled people,
Section 15(5)(cc)	The desirability of allocating land for the purposes of resettlement,
Section 15(5)(cf)	The extent to which there are rural areas within the district in relation to which there has been a substantial decline in population,
Section 16(2)(ab)	In preparing a local development plan the planning authority are to have regard to the list published under section 16E of persons seeking to acquire land in the authority's area for self-build housing.
Section 16B(3)(b)(i)	A summary of the action taken by the planning authority to support and promote the construction and adaptation of housing to meet the housing needs of older people and disabled people in the authority's area,
Section 16B(3)(b)(ii)	An analysis of the extent to which the action has helped to meet those needs,
Section 16B(3)(c)(i)	A summary of the action taken by the planning authority to meet the accommodation needs of Gypsies and Travellers in the authority's area,



Section	Requirement
Section 16B(3)(c)(ii)	An analysis of the extent to which the action has helped to meet those needs,
Section 4ZB(2)	In exercising their functions of preparing, revising or amending a local development plan, a planning authority must have regard to their adopted regional spatial strategy and any local housing strategy.
Section 264A	In the exercise, with respect to any land in a National Park, of any power under the planning Acts, special attention shall be paid to the desirability of exercising the power consistently with the adopted National Park Plan.

Links to evidence

- National Park (Scotland) Act 2000
<https://www.legislation.gov.uk/asp/2000/10/contents>
- Scotland's Housing Emergency motion (15 May 2024)
<https://www.parliament.scot/chamber-and-committees/votes-and-motions/S6M-13197>
- Chief Planner letter: planning for housing (June 2024)
<https://www.gov.scot/publications/planning-for-housing-chief-planner-letter-june-2024/>
- National Performance Framework
<https://nationalperformance.gov.scot/>
- Housing to 2040 (2021)
<https://www.gov.scot/publications/housing-2040-vision-principles/>
- Rural and Islands Housing: Action Plan (2023)
<https://www.gov.scot/publications/rural-islands-housing-action-plan/>
- National Planning Framework 4 (2023)
<https://www.gov.scot/publications/national-planning-framework-4/documents/>



- National Planning Framework 4 – Minimum All-tenure housing land requirement – Cairngorms National Park Assessment Report (September 2021)
<https://www.transformingplanning.scot/media/2772/cairngorms-national-park-npf4-housing-land-sg-assessment-report-pdf.pdf>
- National Planning Framework 4 – Minimum All-tenure housing land requirement – Method Paper (February 2021)
<https://www.transformingplanning.scot/media/2252/npf4-housing-land-figures-method-paper-pdf-123mb-v2.pdf>
- Circular 3 / 2012: Planning Obligations and Good Neighbour Agreements (revised November 2020)
<https://www.gov.scot/publications/planning-circular-3-2012-planning-obligations-good-neighbour-agreements-revised-2020/>
- Planning Advice Note 2 / 2010
<https://www.gov.scot/binaries/content/documents/govscot/publications/advice-and-guidance/2010/08/pan-2-2010-housing-land-audits/documents/pan-2-2010-pdf/pan-2-2010-pdf/govscot%3Adocument/pan%2B2%2B2010.pdf>
- Chief Planner letter: occupancy restrictions and rural housing (November 2011)
<https://cairngorms.co.uk/wp-content/uploads/2024/07/Chief-Planners-Letter-Occupancy-conditions-and-rural-housing-2011.pdf>
- Private Sector Rent Statistics, Scotland 2010 to 2023 (November 2023)
<https://www.gov.scot/publications/private-sector-rent-statistics-scotland-2010-to-2023/documents/>
- Short Term Lets in Scotland Licensing Scheme: Part 2. Supplementary Guidance for Licensing Authorities, Letting Agencies and Platforms (2023)
<https://www.gov.scot/publications/short-term-lets-scotland-licensing-scheme-part-2-supplementary-guidance-licensing-authorities-letting-agencies-platforms-3/documents/>
- Existing Housing Need in Scotland, Homes for Scotland (2024)
<https://homesforscotland.com/download/existing-housing-need-in-scotland/?wpdmdl=4635&refresh=65acfb449d0481705835332>



- Supporting and enabling sustainable communities: an action plan to address depopulation (2024)
<https://www.gov.scot/binaries/content/documents/govscot/publications/strategy-plan/2024/02/supporting-enabling-sustainable-communities-action-plan-address-depopulation/documents/supporting-enabling-sustainable-communities-action-plan-address-depopulation/supporting-enabling-sustainable-communities-action-plan-address-depopulation/govscot%3Adocument/supporting-enabling-sustainable-communities-action-plan-address-depopulation.pdf>
- Rural planning in the 2020s: Technical report 2 – Analysis of rural housing market change, RTPI (June 2022)
<https://www.rtpi.org.uk/media/11914/tech-report-2-housing-market-analysis.pdf>
- The Role of Land in Enabling New Housing Supply in Rural Scotland, Scottish Land Commission (2020)
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- Land Supply for Housing in Rural Scotland, Scottish Land Commission (2025)
https://www.landcommission.gov.scot/downloads/67aa1a0d7b7d1_Land%20supply%20for%20housing%20in%20rural%20Scotland.pdf
- Scottish Government Urban Rural Classification 2022
<https://www.gov.scot/publications/scottish-government-urban-rural-classification-2022/pages/overview/>
- Place-based policy approaches to population challenges: Lessons for Scotland (2022)
<https://www.gov.scot/binaries/content/documents/govscot/publications/independent-report/2022/12/place-based-policy-approaches-population-challenges-lessons-scotland/documents/place-based-policy-approaches-population-challenges-lessons-scotland/place-based-policy-approaches-population-challenges-lessons-scotland/govscot%3Adocument/place-based-policy-approaches-population-challenges-lessons-scotland.pdf>



- Demographic challenges in the Highlands and Islands – A focus on peripheral and fragile areas, The Convention of the Highlands and Islands (October 2020)
<https://www.gov.scot/binaries/content/documents/govscot/publications/minutes/2021/02/convention-of-the-highlands-and-islands-meeting-papers-october-2020/documents/paper-6-population-and-fragile-communities/paper-6-population-and-fragile-communities/govscot%3Adocument/Paper%2B6%2B-%2BPopulation%2Band%2BFragile%2BCommunities.pdf>
- Scottish Government Reporter's Gate Check decision on the Stirling Local Development Plan Evidence Report (Ref: GATE-390-1), dated 17 June 2025
<https://www.dpea.scotland.gov.uk/Document.aspx?id=1095704>
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https://www.researchgate.net/publication/349053786_Final_Report_European_Shrinking_Rural_Areas_Challenges_Actions_and_Perspectives_for_Territorial_Governance_ESPON_2020_project_ESCAPE
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<https://www.lloydsbankinggroup.com/media/press-releases/2023/halifax-2023/three-years-on-how-the-pandemic-reshaped-the-uk-housing-market.html>
- Cairngorms National Park Partnership Plan 2022 – 2027
<https://cairngorms.co.uk/uploads/documents/Cairngorms-National-Park-Partnership-Plan-full-version-FINAL.pdf>
- Cairngorms National Park Local Development Plan 2021
<https://cairngorms.co.uk/uploads/documents/CNPA-LDP-2021-web.pdf>
- Cairngorms National Park Local Development Plan 2021 Delivery Programme 2025
<https://cairngorms.co.uk/documents/delivery-programme-2025>
- Cairngorms National Park Development Plan Scheme 2024
<https://cairngorms.co.uk/documents/development-plan-scheme-2024>
- Aviemore, Rothiemurchus and Glenmore Community Action Plan 2024
<https://cairngorms.co.uk/uploads/documents/Aviemore-Rothiemurchus-Glenmore-Community-Action-Plan-2024.pdf>



- Ballater and Crathie Community Action Plan 2023
<https://cairngorms.co.uk/uploads/documents/Ballater-Crathie-CAP-2023-Final.pdf>
- Blair Atholl and Struan Community Action Plan: Looking to 2030
<https://cairngorms.co.uk/uploads/documents/Blair-Atholl-Struan-Community-Action-Plan-2023-final.pdf>
- Boat of Garten Action Plan: Looking to 2030
<https://cairngorms.co.uk/uploads/documents/Boat-of-Garten-Community-Action-Plan-2025.pdf>
- Braemar Community Action Plan 2017
<https://cairngorms.co.uk/uploads/documents/2017-BraemarAction-Plan.pdf>
- Carrbridge Community Action Plan: Looking to 2030
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- Cromdale and Advie Community Action Plan 2013
<https://cairngorms.co.uk/uploads/documents/2013CromdaleAdvieActionPlan.pdf>
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- Kincaig and locality Community Action Plan: Looking to 2030
<https://cairngorms.co.uk/uploads/documents/Kincaig-and-locality-Community-Action-Plan-2024.pdf>
- Kingussie Community Action Plan: Looking to 2030
<https://cairngorms.co.uk/uploads/documents/Kingussie-Community-Action-Plan-2025.pdf>



- Laggan Community Action Plan: Looking to 2030
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- Mount Blair Community Action Plan 2013 – 2018
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- Nethy Bridge Community Action Plan: Looking to 2030
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<https://www.nrscotland.gov.uk/>
- Rebased population estimates, Scotland, mid-2011 to mid-2021
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- Small area population estimates: mid-2022
<https://www.nrscotland.gov.uk/publications/small-area-population-estimates-mid-2022/#>
- Small area statistics on households and dwellings, 2024
<https://www.nrscotland.gov.uk/publications/small-area-statistics-on-households-and-dwellings-2024/#>
- Scotland's Census
<https://www.nrscotland.gov.uk/>



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- Highland Council Housing Need and Demand Assessment 2020
https://www.highland.gov.uk/downloads/file/24868/hnda_third_submission_december_2021
- Highland Council Indicative Regional Spatial Strategy 2021
<https://highland.maps.arcgis.com/apps/MapSeries/index.html?appid=3028e38a2bc848cfba0db39d7fbda29b>
- Highland Council Local Housing Strategy 2023
https://www.highland.gov.uk/downloads/file/18724/local_housing_strategy
- Highland Council Strategic Housing Investment Plan 2023
https://www.highland.gov.uk/meetings/meeting/4780/housing_and_property_committee
- Highland Council Inverness & Cromarty Firth Green Freeport Housing Supply Targets 2024
<https://highland.maps.arcgis.com/sharing/rest/content/items/33119216b43f4190ae55303e0b505d15/data>
- Highland Council Housing Land Audit 2024
https://www.highland.gov.uk/info/205/planning_-_policies_advice_and_service_levels/556/housing_land_information
- Highland Council Short term lets public register
https://www.highland.gov.uk/info/20021/short_term_lets/1047/short_term_lets_public_register
- Highland Council Non-Statutory Short-Term Let Control Area Planning Policy
https://www.highland.gov.uk/download/downloads/id/28381/non-statutory_planning_policy.pdf
- Badenoch and Strathspey Housing Needs Survey 2021
https://www.highland.gov.uk/downloads/file/24869/paper_8_-_badenoch_and_strathspey_housing_needs_survey_december_2021
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- Aberdeenshire Council Local Housing Strategy 2018 - 2023
<https://www.aberdeenshire.gov.uk/media/21913/aberdeenshirelocalhousingstrategy2018-2023.pdf>
- Aberdeenshire Council Local Housing Strategy 2024 – 2029
<https://abshirepublications.blob.core.windows.net/acblobstorage/bfa5bf2d-455f-47e4-a354-da2d5f2879bf/aberdeenshire-council-local-housing-strategy-2024-2029.pdf>
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- Aberdeenshire Local Development Plan 2029 Evidence Report - Quality Homes Topic Paper
<https://engage.aberdeenshire.gov.uk/35476/widgets/103505/documents/74459>
- Grampian Regional Equalities Council – Research Paper: Accommodation Needs of Ethnic Minorities, Gypsy/Travellers and Travelling Showpeople (2022)
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- Aberdeenshire Gypsy/Traveller Site Provision Strategy 2021-2026
<https://www.aberdeenshire.gov.uk/media/26947/gypsy-traveller-site-provision-strategy-2021-2026.pdf>



- Aberdeen City and Aberdeenshire Council Housing Land Audit 2024
<https://www.aberdeenshire.gov.uk/document-store/housebuilding-in-aberdeen-city-and-aberdeenshire>
- Aberdeenshire Health and Social Care Partnership Strategic Plan 2020 – 2025
<https://publications.aberdeenshire.gov.uk/dataset/92dd401b-c939-4b2d-a804-e556a8fa9b69/resource/e7a18b76-77b8-40ca-87c1-36916c7300f5/download/ahscp-strategic-plan-2020---2025.pdf>
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- Angus Council Housing Land Audit 2024
<https://www.angus.gov.uk/sites/default/files/2025-01/Angus%20Housing%20Land%20Audit%202024.pdf>
- Angus Council short-term lets public register
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- Moray Council Housing Need and Demand Assessment 2023
<http://www.moray.gov.uk/downloads/file154069.pdf>
- Moray Council Local Housing Strategy 2019-2024
<http://www.moray.gov.uk/downloads/file123859.pdf>
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- Moray Council Housing Land Audit 2024 / 25
<http://www.moray.gov.uk/downloads/file156677.pdf>
- Moray Council Gypsy / Traveller Housing Need Assessment
<http://www.moray.gov.uk/downloads/file152986.pdf>
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- Perth and Kinross Council Change of Use of Residential Property of Short-term Let
https://www.pkc.gov.uk/media/51995/Planning-Guidance-Change-of-Use-of-Residential-Property-to-Short-term-Let/pdf/Short-term_Let_2023.pdf?m=1701336943553



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- Communities Housing Trust Housing Needs Survey Report for Blair Atholl and Struan Community Council
<https://cairngorms.co.uk/uploads/documents/Local-Development-Plan-Evidence-Report/External-documents/CNPA209-Housing-needs-survey-report-for-Blair-Atholl-and-Struan-Community-Council-2024.pdf>

Park Authority assessments and reports

- Cairngorms National Park resident and worker survey results 2024 – 2025
<https://cairngorms.co.uk/document-collection/resident-and-worker-survey-results-2024-25>
- Statistical areas used in the analysis of the Cairngorms National Park
<https://cairngorms.co.uk/uploads/documents/Local-Development-Plan-Evidence-Report/Supporting-Documents/Statistical-areas-used-in-the-analysis-of-the-Cairngorms-National-Park.pdf>
- Local Development Plan: Gypsy / Traveller Community Engagement – Cairngorms National Park, Conyach Advocacy and Engagement (June 2024)
<https://cairngorms.co.uk/uploads/documents/Local-Development-Plan-Evidence-Report/Supporting-Documents/Cairngorms-National-Park-Gypsy-Traveller-Community-Engagement-2024.pdf>
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Summary of evidence

Policy context

National Park (Scotland) Act 2000

The National Park has four distinct aims as set out in The National Parks (Scotland) Act 2000). The fourth aim is 'to promote sustainable economic and social development of the area's communities'. The aims are all to be pursued collectively. However, if there is conflict between the first aim and any of the others, greater weight is given to the first aim (as set out in Section 9(6) of the 2000 Act).

Crofters (Scotland) Act 1993

The Crofters (Scotland) Act 1993, as amended by the Crofting Reform etc Act 2007, Crofting Reform (Scotland) Act 2010, and Crofting (Amendment) (Scotland) Act 2013, forms the legislative framework that governs the use of croft land in Scotland. The act sets out the definition for crofts and crofters and sets out duties crofters must meet to occupy croft land, including duties relating to residency, maintenance, cultivation and use. National Planning Framework 4 Policy 17 states that local development plans should set out provision for tailored approaches to rural housing, including provision for small-scale housing such as crofts or woodland crofts.

Scotland's Housing Emergency

The Scottish parliament declared a housing emergency on 15 May 2024. As well as identifying the reasoning for why there is a housing emergency in Scotland and the fact that nearly £600 million will be invested in affordable housing by the Scottish Government in 2024 – 25, the declaration agreed that the Scottish Government, UK Government and local authorities must work together to deliver a housing system that meets the needs of the people of Scotland. The First Minister confirmed his intention to engage constructively to expand housing supply and tackle homelessness.

Chief Planner letter: planning for housing (June 2024)

Following the Scottish parliament's declaration of a housing emergency, the 26 June 2024 joint Chief Planner and Minister's letter, recognises that planning is just one of many factors that impact on the delivery of housing, but must play its part. The letter provides clarification on the application of National Planning Framework 4, including Policy 16 Quality Homes. It also stresses that a more positive dialogue on planning for housing is needed, that recognises that benefits quality homes can bring and the need to find constructive solutions to challenges and work collectively on the issues.



National Performance Framework

The Scottish Government's National Performance Framework sets out fifteen National Outcomes that aim to get everyone in Scotland working together, including 'national and local government, businesses, voluntary organisations and people living in Scotland'. The outcome relevant to housing is communities.

The National Outcome for Communities sets out the following vision:

'Our communities are pleasant places to live where everyone has a warm, appropriate, efficient and affordable home. We value excellent and innovative design and are committed to sustainable planning and transport...'

'Our older people are happy and fulfilled and Scotland is seen as the best place in the world to grow older. We are careful to ensure no-one is isolated, lonely or lives in poverty or poor housing. We respect the desire to live independently and provide the necessary support to do so where possible. We recognise that older people have particular needs around financial advice, mobility and transport, home improvements, heating, technology and the internet which require additional support.'

This outcome is directly linked to the Scottish Government's response to addressing five United Nations Sustainable Goals, the most relevant to housing being Affordable and Clean Energy (7), Reduce Inequalities (10) and Sustainable Cities and Communities (11).

Housing to 2040 (2021)

Housing to 2040 is Scotland's long-term national housing strategy. It predates Planning Framework 4 and comprises a vision and principles document and a route map. The overarching aim is that 'by 2040, everyone will have a safe, high-quality home that is affordable and meets their needs in the place they want to be' (Housing to 2040, page 15).

The vision aims to achieve: a well-functioning housing system; high quality, sustainable homes; sustainable communities; and homes that meet people's needs. Under the vision are 15 principles.

Relevant to this housing paper are:

- Principle 2 states that the housing system should supply high quality homes that are affordable for living in and comments that 'one decent home per household takes priority over second homes and investment returns'. It recognises that Government



actively shapes the market so that everyone has a reasonable choice of where they live and the type of accommodation they live in.

- Principle 6 requires tenure-neutral space and quality standards.
- Principle 10 states that brownfield sites should be prioritised and that all housing should be resilient to climate change, including minimising flood risk, and promote biodiversity.
- Principle 11 states that new housing and community resources should only be provided where it helps to create safer, stronger, attractive, sustainable and integrated communities. This means facilitating active or accessible travel to school, healthcare and employment opportunities, and enabling residents to continue to be active in their community as they get older. It notes that this is a more organic approach to new housing with the right number and type of homes placed in such a way as to strengthen the existing community.
- Principle 12 empowers local communities to respond to housing need in their area by taking action to meet that housing need and having a say about how the homes are used in their area (for example the numbers of second homes).
- Principle 13 encourages place-based approaches to help existing and new communities be physically, digitally, culturally and economically connected within a coherent geographic region. It recognises that settlements do not exist in isolation but have strong inbound and outbound connections.
- Principle 15 envisages a highly flexible housing market to meet people's changing needs.

To achieve the vision and principles, the Housing to 2040 route map sets out the actions that the Government proposes to undertake to deliver their ambitions. It comprises twenty actions, under four parts: More Homes at the heart of great places; Affordability and choice; Affordable warmth and zero emissions homes; and improving the quality of all homes.

While many of the actions are focused on changes to legislation, regulations and funding, the Housing to 2040 route map recognises (on page 23) that 'the statutory planning system is a powerful lever to deliver more for communities'. Action 5 seeks to make the planning system more directive about the quality of places, including where new development should happen and how those developments can deliver more for new and existing communities. It explains this through six criteria, which would be achieved through National Planning Framework 4:

- Taking a brownfield first approach to development.
- Adopting an infrastructure-first approach to neighbourhood planning.
- Planning places to significantly reduce overall car mileage.



- Supporting the development of quality homes that meet people's needs.
- Significantly simplifying the system by tackling the question of housing land requirements up front, so that planning can focus on quality and delivery.
- Rolling out masterplan consent areas to identify places where homes can be built without the need for planning permission.

Rural and Islands Housing: Action Plan (2023)

The action plan sets out a range of actions to support Housing to 2040 and meet the priority to provide affordable housing for rural and island communities. The plan highlights the role of local development plans in the delivery of high-quality affordable homes, including that they must contain a spatial strategy that makes provision for housing in rural areas. It advises that the resource implications of the proposed pattern of development should be understood, including access to local community services and support for sustainable transport, to inform a rural approach to the concept of local living.

Availability of land is identified as one of the key challenges to the delivery of more homes. A 12-month Community Settlement Officer post (one of three across Scotland) was created in 2022 in Highland Council to better understand local population challenges and to develop solutions to address these. This has involved an in-depth mapping exercise of potential plots of land identified through the strong local knowledge of communities, successfully developing positive engagement between private estates, public bodies and community groups.

The plan recognises that:

‘demand for second homes, especially when concentrated in particular areas, can reduce the supply of permanent homes and inflate house prices, making it more difficult for people, particularly younger people, or those with fewer resources, to access the homes they need.’ (page 25)

But also, that:

‘second homes and short-term lets bring benefits to those who own them and the tourism businesses and local economy that they support. While recognising the positive economic impacts that tourism can bring, low occupancy of second homes, even if used partially as short-term lets, can minimise associated economic contribution and the broader support for local public services.’ (page 26)



The plan highlights that (based on September 2022 data), while second homes account for 0.9% of the total number of dwellings across Scotland, this rises to 6.5% in remote rural¹ areas, with empty homes accounting for a further 5.5%, compared to 3.4% across Scotland as a whole. The new mandatory licensing regime is stated to be appropriate for the whole of Scotland to regulate short-term lets. The action plan commits to continued funding of the Scottish Empty Homes Partnership to return homes to active use, particularly as affordable housing.

The action plan also highlights the role of community-led housing and the important role new housing plays for rural economies. The plan showcases the development of 24 social rented homes on a former school site in Ballater and the boost to the local economy of utilising local contractors.

Supporting and enabling sustainable communities: an action plan to address depopulation 2024

Published in February 2024, this action plan sets out the Scottish Government's strategic approach to addressing the challenges of population attraction and retention within communities facing population decline.

The plan emphasises the importance of local leadership and anticipates a place-based approach, with the action plan providing a starting point on how best to deliver on local needs and ambitions.

As well as a list of actions, the document identifies the local and national context, including the evidence base, the role of 'regional and local actors' such as local authorities and enterprise agencies and the support needed from Scottish Government.

Nationally, Scotland's population is projected to fall by 0.6% from mid-2023 to mid-2045, while the United Kingdom's population is projected to grow by 8%. This change is not universal however, with growth in the central belt and urban areas and decline mainly projected to be in the West of Scotland. However, the Scotland-wide map on page 8 of the document indicates that growth is anticipated to 2030 in Badenoch and Strathspey and rural Aberdeenshire, within the National Park.

¹ As defined by the urban / rural classifications.



The plan is clear that the Scottish Government does not intend to restore population to historic levels, nor set targets or outcomes for specific geographic areas. Instead, it seeks to set out support for place-based and / or person-centred interventions.

A series of national-level policies are set out, which can support locally-led initiatives and set core foundations. These enabling policies are grouped into the themes of infrastructure, services, land and marine, culture and economy.

The importance of housing (under the infrastructure theme) is recognised. Two key national documents – Housing to 2040 and the Rural and Islands Housing Action Plan are summarised and the following Scottish Government actions listed:

- We will deliver 110,000 affordable homes of which at least 70% will be for social rent and 10% in rural and island areas, supported by our Rural and Island Housing Action Plan, to help attract and retain people to communities.
- We will make available up to £25 million from our Affordable Housing Supply Programme budget over the period 2023-2028 for the demand-led Rural Affordable Housing for Key Workers Fund, to enable local authorities and registered social landlords to purchase properties in rural and island areas which can be rented directly or leased to employers to provide affordable homes for key workers.
- We will work with local authorities, enterprise agencies and business representatives including private developers to improve understanding of housing requirements arising from key sectors. We will seek to enable more housing provision through sharing of good practice and collaboration between employers and housing providers.
- We will work with the Scottish Empty Homes Partnership, local authorities and owners to bring more empty homes in rural and island areas back into use, promoting available funding options, sharing best practice and identify opportunities for stronger collaboration.
- We will invest £566 million in 2024-25 through our Affordable Housing Supply Programme as we continue to support the delivery of affordable homes to meet housing needs across Scotland.
- We will continue to provide support of up to £30 million for the continuation of the demand-led Rural and Island Housing Fund, supporting communities, landowners and other eligible organisations in the provision of affordable housing, through early feasibility funding as well as grant support. This is in addition to housing delivery by local authorities and Registered Social Landlords through the mainstream Affordable Housing Supply Programme.



- We will develop guidance to support communities, local authorities and others to undertake local housing assessments based on best practice and robust methodology.

National Planning Framework 4

National Planning Framework 4 came into force in February 2023 and is the long-term National Spatial Strategy for Scotland. For the first time it contains a set of planning policies that form part of the statutory development plan.

National Planning Framework 4 has three themes, one of which is liveable places – ‘where we can all live better, healthier lives’. Page 10 of National Planning Framework 4 explains that liveable places are those with access to affordable, quality homes. It recognises that the planning system has an important role to play in supporting their delivery.

Policy 16 Quality homes encourages, promotes and facilitates the delivery of high quality, affordable and sustainable homes, in the right locations and with a choice of tenures. The 26 June 2024 joint Chief Planner and Minister’s letter confirms that the different parts of Policy 16, which are summarised below, should be weighed up as relevant to the proposals and that there is no hierarchy. The letter advises that a balanced planning judgement should be reached in each case.

Policy 16(a) supports proposals for new homes on land allocated for housing in local development plans. Local development plans must identify a Local Housing Land Requirement for their area. National Planning Framework 4 expects local development plans to take an ambitious approach that exceeds the 10-year Minimum All-Tenure Housing Land Requirement (also referred to as the ‘10-year land requirement’) as set out in Annex E. For the Cairngorms National Park, the Minimum All-Tenure Housing Land Requirement is 850 housing units.

Policy 16 advises that deliverable land should be allocated to meet the 10-year Local Housing Land Requirement in locations that create quality places for people to live. The location of new home allocations should be consistent with local living including, where relevant, 20-minute neighbourhoods and an infrastructure first approach. National Planning Framework 4 requires diverse needs and delivery models to be taken into account, as well as allocating land for Gypsy / Travellers where a need is identified.

A local development plan delivery programme (currently called the ‘Action Programme’) is required, to establish a deliverable housing land pipeline to meet the Local Housing



Land Requirement over the short (1-3 years), medium (4-6 years) and long-term (7-10 years). The delivery programme will provide a clear picture of the phasing of housing allocations so that infrastructure, to enable delivery, can be planned.

The Park Authority will be responsible for preparing the delivery programme, but annual Housing Land Audits, which will monitor housing delivery, will be undertaken by the respective local authorities. The Park Authority will take account of these and use them to inform the pipeline and identify actions required to bring sites forward.

Policy 16(b) states that Statements of Community Benefit are required for development proposals of 50 or more homes, and for smaller developments if required by local policy or guidance. Given the potential impact of developments of less than 50 homes on small settlements in the Cairngorms National Park a lower threshold should be considered.

Policy 16(c) supports development proposals for new homes that improve affordability and choice by being adaptable to changing and diverse needs, and which address identified gaps in provision. The Chief Planner and Minister's letter advises that this can be evidenced by a range of information available on local housing matters, such as local housing strategies, local authority housing emergency action plans or planned actions to support emerging economic opportunities.

Policy 16(d) supports development proposals for public or private, permanent or temporary, gypsy/traveller sites and family yards and travelling showpeople yards, including on land not specifically allocated for this use in a local development plan, where a need is identified, and the proposal is otherwise consistent with the plan's spatial strategy and other relevant policies. Policy 16 advises that local development plans should allocate land to ensure provision of accommodation for Gypsy / Travellers and travelling showpeople where need is identified.

Policy 16(e) supports development proposals for new homes where they contribute to the provision of affordable housing of at least 25% of the total number of homes. It adds that a higher contribution may be justified by evidence of need.

This approach is already taken in the adopted Local Development Plan 2021. In response to evidence, Local Development Plan Policy 1.5 requires affordable housing to amount to 45% of the total number of dwellings in developments of four or more dwellings in the settlements of Aviemore, Ballater, Blair Atholl and Braemar.



Affordability remains one of the principal housing challenges within the National Park. Policy C2 (New Housing) of the Cairngorms National Park Partnership Plan 2022-2027 sets a target that by 2030, 75% of new housing is for social rental, mid-market rental or other affordable categories, using the next local development plan to identify further locations where more than 25% affordable housing is required.

Policy 17 Rural homes aims to deliver more high quality, affordable and sustainable rural homes. It seeks to improve choice, support sustainable rural communities and safeguard and enhance distinctive character, sense of place and natural and cultural assets.

It requires local development plans to be informed by an understanding of population change, locally specific needs and market circumstances and to set out tailored approaches to rural housing, including, where relevant, proposals for future population growth.

Policy 17(a)(i) supports new homes in rural areas where the site is allocated within a local development plan. Policy 17(b) requires proposals for new homes in rural areas to consider identified local housing needs (including affordable housing), economic considerations and the transport needs of the development. Policy 17(c)(ii) supports new homes in remote rural areas where it would support identified local housing outcomes. Policy 17(d)(i) supports new homes that support the resettlement of previously inhabited areas where they are identified in a local development plan.

The following National Planning Framework 4 policies are listed as key connections to Policies 16 and 17 and are relevant to this evidence base:

Sustainable Places

- Policy 1. Tackling the climate and nature crises
- Policy 2. Climate mitigation and adaptation
- Policy 4. Natural places
- Policy 7. Historic assets and places
- Policy 9. Brownfield, vacant and derelict land and empty buildings
- Policy 13. Sustainable transport

Liveable Places

- Policy 14. Design, quality and place
- Policy 15. Local living and 20-minute neighbourhoods
- Policy 18. Infrastructure first



- Policy 19. Heat and cooling
- Policy 20. Blue and green infrastructure
- Policy 21. Play, recreation and sport
- Policy 23. Health and Safety

Productive Places

- Policy 25. Community wealth building
- Policy 28. Retail
- Policy 30. Tourism

Policy 27 City, town, local and commercial centres seeks to create centres that are vibrant, health places to live in as well as to enjoy and visit. To help achieve this outcome, it states that local development plans should provide a proportion of their Local Housing Land Requirements in city and town centres and be proactive in identifying opportunities to support residential development.

Policy 29 Rural development seeks two outcomes – vibrant and sustainable rural places where communities are supported; and a balanced and sustainable rural population. It states that local development plans should identify the characteristics of rural areas within the plan area, including the existing pattern of development, pressures, environmental assets, community priorities and economic needs of each area. The spatial strategy should set out an appropriate approach to development in rural areas which reflects the identified characteristics. Policy 29 advises that the Scottish Government's 6 fold Urban Rural Classification 2020² should be used to identify remote rural areas. Spatial strategies should support the sustainability and prosperity of rural communities and economies. Previously inhabited areas which are suitable for resettlement should be identified in the spatial strategy.

Policy 29(d) advises that development proposals that support the resettlement of previously inhabited areas will be supported where the proposal is identified in the local development plan for settlement; is designed to a high standard, responds to its rural location; and is designed to minimise greenhouse gas emissions as far as possible.

Policy 30(e)(ii) Tourism states that development proposals for short-term holiday letting will not be supported where the reuse of existing buildings results in the loss of

² The Scottish Government Urban Rural Classification 2020 was replaced by the Scottish Government Urban rural Classification 2022 in December 2024. [Click here to view the 2022 classification.](#)



residential accommodation unless such loss is 'outweighed by demonstrable local economic benefit'.

Annex C of National Planning Framework 4 provides information on spatial planning priorities to guide the preparation of regional spatial strategies and local development plans. In relation to the North region, Annex C recognises that to deliver sustainable places in the Cairngorms National Park, demand for development will require a planned response to minimise the impact of second homes on local communities and to ensure new homes are affordable and meet local needs.

National Planning Framework 4 – Minimum all-tenure housing land requirement – Cairngorms National Park Assessment Report, September 2021

This report set the initial Cairngorms National Park Authority's minimum all-tenure housing land requirement and explains its derivation. The proposed 10-year all-tenure requirement is 850 dwellings. The report explains that the requirement is primarily based on the National Records of Scotland 2018-based principal migration variant, with the deduction of newly forming households for those local authority data zones which split across the Cairngorms National Park boundary. The household projection is 600. The requirement is also based on the addition of a Scottish Government estimate of existing housing need figure of 50. A rural 30% flexibility allowance is then applied.

The report notes that the Cairngorms National Park Authority argued, through consultation on the derivation of the minimum all-tenure housing land requirement, that, while the 30% flexibility allowance provides a total number that is comparable with the current adopted local development plan in this initial default estimate, a recalculation on the basis of other projections in the future could very significantly increase the housing land requirement and create a conflict with other policy and legislation. A 10% flexibility allowance is preferred. This would reduce the estimate by approximately 150 dwellings.

National Planning Framework 4 – Minimum All-tenure housing land requirement – Method Paper, February 2021

This paper explains the method used to arrive at initial default estimates for minimum all-tenure housing land requirements for each local planning authority (all local and national park authorities). It explains that, for national spatial planning purposes, it is the scale of land required to be allocated for housing that is relevant, hence figures are not separated into market and affordable housing. Tenure is to be considered at the local



level, based on the detailed planning for housing process of the Housing Need and Demand Assessments and Local Housing Strategies.

The minimum all-tenure housing land requirements are calculated for fifteen years from 2022. This is because local planning authorities are expected to adopt new style local development plans within five years of National Planning Framework 4 being adopted, which, at the time of publication of this paper (February 2021) was expected to be in 2022. Including figures to 2036 allows the flexibility for all new style plans to look ahead 10 years.

Specific reference is made to the two national park authorities, noting that they are expected to work with the adjoining local authorities to consider whether there is a need for local adjustments to the initial default estimates.

The paper also explains that while the local authority figures are based on the National Records of Scotland 2018-based principal household projections, in the national parks the 2018-based estimates of occupied households are also used. These are used to derive a household projection for the whole of each national park and for each housing market area within each park. This is because National Records of Scotland do not produce household projections at sub-national park level (only park level as a whole). These sub-areas are required to avoid overestimates to local authorities that overlap the national parks, by subtracting the two national parks' requirements from their constituent authorities.

The paper notes that while Angus Council and Perth and Kinross Council are part of the Cairngorms National Park, the data zones involved are mainly on the Council side of the border and are included in the local council figures.

Total existing housing need is made up of two elements – a count of concealed and overcrowded households in the 2011 Census (uprated to the Scottish Household Statistics 2016 – 2018 estimates); and total households in temporary accommodation as at 31 March 2020.

Ten-year default figures are set in Annex J. This includes a breakdown of the Cairngorms National Park figure into the housing market areas of Aberdeenshire, Highland and Moray. These figures provide an indication of how the Cairngorms National Park's minimum all-tenure housing land requirement was derived by the Scottish Government, although the breakdown by local authority is not provided in the steps described below, which follow on from Annex J. Under Annex J, the percentage



distribution of the default ten-year figure is as follows: Aberdeenshire 20% (135); Highland 76% (514); and Moray 4% (27).

A flexibility allowance is applied at 25% for urban areas and 30% for rural areas. The paper explains that the allowances are higher than in the Scottish Planning Policy, because plans are now to be reviewed at 10-year intervals rather than five. As plans will be in place for longer, there is a greater chance of changes to sites coming forward. The higher rural percentage reflects the Planning (Scotland) Act 2019 statutory requirement³ for the National Planning Framework to contribute to the outcome of increasing the population of rural areas of Scotland.

Finally, the minimum all-tenure housing land requirements are rounded to the nearest 50, to reflect the more flexible and indicative approach to housing land intended for the future.

³ Section 3A(3A) of the Town and County Planning (Scotland) Act 1997.



Table 2 and Table 3 extract the data within the paper relevant to the Cairngorms National Park.



Table 2 Extract from the Minimum All-Tenure Housing Land Requirement Method Paper (Annex M - Step 13) showing calculation of the default housing figure for the Cairngorms National Park⁴.

	Existing housing need	Newly forming households	10 year default figure	Flexibility allowance	Flexibility allowance	10 year default figure with flexibility allowance added
	(a)	(b)	(a+b)=c	(d)	(c)x(d)=(e)	(c)+(e)
Cairngorms National Park	52	625	677	0.3	203	880

Notes relevant to the Cairngorms National Park:

- Local authorities are not responsible for planning in national parks. This is the responsibility of the national park authorities. The following authorities each contain a part of Cairngorms National Park: Aberdeenshire, Highland and Moray, Angus and Perth and Kinross. The national parks have been subtracted from the minimum housing land supply for the relevant local authorities and city regions.
- To do this, it was necessary to produce figures at sub national park level for the constituent local authorities. However, neither newly forming household or existing housing need figures are produced at this level of disaggregation. Instead, this is estimated as part of the Housing Need and Demand Assessment Tool. Firstly, the number of occupied dwellings was calculated for each park sub-area and each local authority (this is available from National Records of Scotland). The proportion of sub-area to local authority was then taken. The sub-area proportion was then applied to

⁴ Sources:

- Local Authority figures - 2018-based Household Projection, National Records for Scotland, published September 2020.
- National Park figures - 2018 occupied households, National Records of Scotland, published October 2020 and the Scottish Government HNDA Tool v4.0 published November 2020.

Existing housing need:

- 2011 Census (National Records of Scotland).
- Scottish Household Survey 2016-2018 (Scottish Government).
- Homeless Statistics as at 31 March 2020 (Scottish Government).

Newly forming households and existing housing need for the national parks:

- Housing Need and Demand Assessment Tool v4.0 as at November 2020 (Scottish Government).



both the household projections and existing housing needs counts for each local authority. This then gives a sub national park estimate of newly-forming households and existing housing need.

Table 3 Extract from the Minimum All-Tenure Housing Land Requirement Method Paper (Annex N - Step 14) showing rounded figures for the Cairngorms National Park.

	Existing housing need	Newly forming households	Flexibility allowance (25% urban, 30% rural)	Minimum all tenure housing land requirement
Cairngorms National Park	50	600	200	850

Planning Circular 3 / 2012: planning obligations and good neighbour agreements (revised 2020)

This circular, which was revised to reflect legislative amendments, including the Planning (Scotland) Act 2019, sets out the circumstances in which planning obligations and good neighbour agreements can be used.

Planning obligations are made under Section 75 of the Town and Country Planning (Scotland) Act 1997 (as amended) and should only be sought where they meet a series of tests defined as the: necessity; planning purpose; relationship to proposed development; scale and kind; and reasonableness tests.

The most common use of planning obligations is to ensure the provision of infrastructure to make a development acceptable in planning terms, and Planning Advice Note 2 / 2010 recognises their role where it is necessary to ensure retention of affordable housing units on a development site or to receive a commuted sum to enable the identified affordable housing to be provided off-site.

The circular strongly encourages the adoption of formal policies on the use of planning obligation. It highlights that this provides an opportunity to involve the local community and the development industry in the process of development plan policy development, including supplementary guidance, to clarify the expected costs of any contributions that might be sought.

Paragraphs 49 – 51 of the circular recognise that planning obligations were used historically to restrict the use or occupancy of rural housing. The circular advises that such restrictions can be intrusive, resource-intensive, difficult to monitor and enforce and



can introduce unnecessary burdens or constraints and should be avoided. It advises that where a local planning authority is satisfied that an 'adequate case' has been made for a new home, 'it should not be necessary to use a planning obligation as a formal mechanism to restrict occupancy or use'.

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

The note provides advice in relation to affordable housing and housing land audits. In relation to affordable housing, it advises that a range of housing types, at different prices, tenures and locations are needed to cater for the increased number and variety of households, to maintain the viability of communities and to support the operation of local labour markets and the wider economy.

The note explains how affordable housing should be delivered through the planning system. In summary this is through housing need and demand assessments and local housing strategies identifying a shortage of affordable housing, which is addressed in a local development plan as part of the housing land allocation. It also states that a local planning authority should be clear on the scale and distribution of affordable housing, including by outlining what is expected from developers.

This includes guidance on developer contributions to affordable housing, with paragraph 19 stating that it "should ideally be integrated into the proposed development and wider community" through the developer contributing serviced land for affordable housing at a value less than mainstream housing for sale. In exceptional circumstances, where a site is unsuitable for affordable housing for a variety of reasons including the size of the site, location, topography, conversion of buildings or other local circumstances, a contribution on another site or through the provision of a commuted sum may be acceptable. In these cases, the provision must be of a value equivalent to the cost of providing the affordable housing on site. The note advises that the rationale for accepting or rejecting a commuted sum should be set out clearly in local policy and that a Section 75 agreement may be necessary.

The advice note also highlights (paragraph 30) that there are alternative means of delivering affordable housing including allocating sites in local development plans specifically for affordable housing and identifying plots for self-build dwellings. Paragraphs 31 – 34 highlights that national planning policy aims to achieve high quality, well-designed homes and that affordable housing ought to be indistinguishable from the general mix of other houses on a site. It advises that both 'pepper-potting' of



individual affordable houses and large groupings of houses of the same tenure are best avoided, instead recommending concentrating affordable housing for rent in small groups.

In relation to housing land audits, the note sets out good practice advice. At the time of publication of the advice note, Scottish Planning Policy⁵ required a five-year ongoing effective land supply be available to meet the identified housing land requirement. Housing land audits are the established means for monitoring housing land. They provide an annual update of the amount of land available for the construction of housing.

The housing land audit is required to set out housing completions as well as anticipated future construction. The established housing land supply includes sites allocated in Local Development Plans plus windfall sites (non-allocated sites with planning permission or on previously developed sites where potential for housing has been established through a capacity study). The effective housing land supply comprises those sites which are 'unconstrained'. For a site to be effective it must be demonstrated that it can be developed for housing (residential dwellings completed and available for occupation) within five years and be free of constraints relating to ownership; physical characteristics; contamination; public funding; marketability; infrastructure; and land use. The audit should include programme expected annual completions on each site.

The Cairngorms National Park Authority has no statutory duty to produce a housing land audit; however, it can draw on information from the housing land audits completed by the five constituent local authorities to provide an estimate of its housing land supply.

Chief Planner letter: occupancy conditions and rural housing (2011)

The letter promotes a positive approach to rural housing and advises that local planning authorities should support this through development plans. It advises that the use of occupancy restrictions to limit the occupancy of new houses in the countryside either to people whose main employment is with a farm or other rural business, or to people with a local connection, is causing practical difficulties in the delivery of rural housing. It states that occupancy restrictions can be intrusive, resource-intensive and difficult to monitor and enforce and that they are not promoted within national policy as a

⁵ Note that National Planning Framework 4 replaced the Scottish Planning Policy and it removes the requirement to maintain a five-year housing land supply and replaces this with an expectation that the local development plan delivery programme will establish a deliverable housing land pipeline for the Local Housing Land Requirement. Nevertheless, Planning Advice Note 2 / 2010 remains extant and local authorities continue to produce annual housing land audits.



management tool for rural housing. The first section of the letter concludes that ‘the Scottish Government believes that occupancy restrictions are rarely appropriate and so should generally be avoided’.

Short term lets in Scotland Licensing Scheme - Part 2. supplementary guidance for licensing authorities, letting agencies and platforms (2023)

The guidance explains that there are four types of licence: a) secondary letting; b) home letting; c) home sharing; or d) home letting and home sharing. Home sharing and home letting concern the use of the host or operator’s only or principal home whereas secondary letting makes use of a separate premises.

Each licensing authority (the five local authorities in the case of the Cairngorms National Park area) should have regard to their planning authority’s objectives and policies including the local development plan, other relevant planning policies; and any intended or designated control areas. Licensing authorities can decide to grant a licence for a period of up to 3 years initially and may grant licences for different time periods to different applicants or for different types of short-term licence.

The guidance advises that planning policies still apply (although this will not commonly affect smaller scale home sharing and home letting). However, they are relevant for secondary letting, especially within control areas.

The high-level policy behind control areas is as follows (paragraph 4.10):

- to help manage high concentrations of secondary letting (where it affects the availability of residential housing or the character of a neighbourhood).
- to restrict or prevent short-term lets in places or types of building where it is not appropriate.
- to help local authorities ensure that homes are used to best effect in their areas.

Licensing authorities are required to maintain a public register of short-term let licences. There is a specification for the public register (Annex B of the guidance). It includes a requirement to identify whether the short-term let is within either of Scotland’s two national parks. The guidance advises (para 7.8) that the requirement for the data is to assist the national parks ‘in identifying short-term let activity within their boundaries (which are not necessarily contiguous with licensing authority boundaries)’.



The public register must also list the type of premises, the maximum number of guests allowed to reside in the premises, and the number of bedrooms or individual pods on a single site.

Highland Council Non-Statutory Short-Term Let Control Area Planning Policy

Introduced in November 2023, the policy responds to the fact that the proposed use of a dwellinghouse as a short-term let requires planning permission in a designated control area. The ward of Badenoch and Strathspey is a designated control area.

The non-statutory policy states that National Planning Policy 30(e) applies, which does not support proposals for short-term holiday lets that result in the loss of residential accommodation, unless the loss is outweighed by demonstrable local economic benefits.

The use of an existing dwellinghouse as a short-term let will be supported where it falls within one of the following categories:

1. It is a long-term empty dwellinghouse that will be brought back into active use.
2. The dwellinghouse is located above a commercial unit within a city, town or village centre.
3. The dwellinghouse has no fewer than four bedrooms, as it existed at the date of the establishment of the Control Area or, if constructed after the designation of the Control Area, as originally built.

The non-statutory policy also states that, when assessing the impact on local amenity and character (National Planning Policy 4 Policy 30 (e)(i)), the Council will consider privacy, amenity, parking provision, commercial waste storage, and neighbouring land uses.

Cairngorms National Park Partnership Plan 2022 – 2027

The Cairngorms National Park Partnership Plan (Partnership Plan) is the overarching land use management plan for the National Park and sets out how all those responsible for it will coordinate their work to tackle the most important issues. It also provides the strategic direction for key strategies and plans, including the Local Development Plan. This includes a spatial strategy, which identifies strategic developments and a settlement hierarchy (Figure 1).



The Local Development Plan will need to align with the Partnership Plan. The outcomes for the Cairngorms National Park Local Development Plan are therefore those of the National Park Partnership Plan. This is explained further in the Plan Outcomes topic paper⁶ (page 13). In relation to housing, the local development plan will follow the settlement hierarchy by concentrating housing development in strategic settlements.

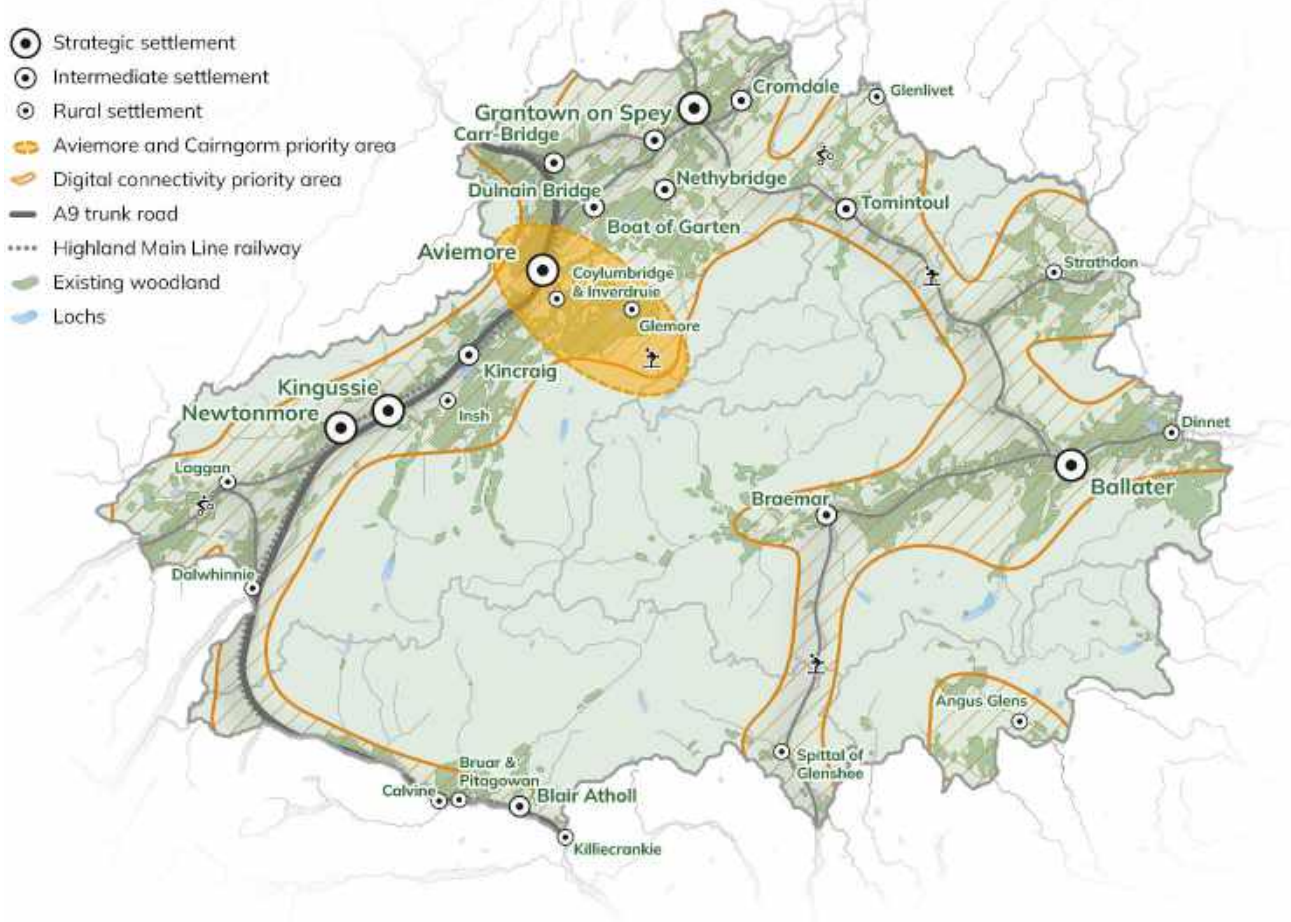


Figure 1 Strategic diagram from the National Park Partnership Plan 2022. Cairngorms National Park Authority © Crown copyright and database rights 2025 Ordnance Survey AC0000821810.

The Partnership Plan contains sets of objectives, targets and policies under three overarching outcomes: Nature, People and Place. Housing is one of the biggest challenges within the National Park and there are three objectives within the 'Place' theme (page 60) that aim to tackle the housing issues. These objectives are:

⁶ See: <https://cairngormslpd.commonplace.is/en-GB/proposals/plan-outcomes-survey>



B1. Working age population, seeks to increase the proportion of young and working-age people in the National Park relative to the total resident population, which remains stable. The target is for this to be achieved by 2045. Actions by 2027 are:

- Develop and implement a Local Development Plan.
- Develop a green skills / youth apprenticeship project to help grow a strong working-age population.
- Grow the influence and level of youth participation in the Cairngorms Youth Action Team.
- Heritage Horizons: Cairngorms 2030 programme.

B5. Community assets and land, aims to increase the number of assets in community ownership or management, the number of social enterprises that generate a profit and the area of land where communities are involved in management decisions. The target is for the number of assets in community ownership or management to increase in on year from 2021. Actions by 2027 are:

- Identify opportunities for community land ownership through a refreshed set of community action plans / local place plans.
- Promote Scottish Land Commission guidance and monitor compliance.
- Develop targeted skills initiatives to support social enterprises.
- Support communities to acquire and manage assets / land through enhanced funding and training support.
- Heritage Horizons: Cairngorms 2030 programme.

C1. Access to housing, which aims to ensure that there is sufficient affordable housing stock to enable people to live and work within the National Park. Its target is for a maximum of 15% of all housing stock in the National Park to be second homes, vacant or short-term let properties by 2040. Actions by 2027 are:

- Introduce short-term let control areas and licencing to increase the availability of mid-market properties to meet local needs.
- Secure investment in the private rented sector to provide long-term housing for workers and local people.
- Develop partnership approaches led by local businesses and community-led initiatives to address accommodation needs for workers and local people.

C2. New housing aims to deliver new housing in the National Park and ensure as much as possible is secured for key workers and / or to resolve affordability issues. It sets a



target that by 2030, 75% of new housing is for social rental, mid-market rental or other affordable categories that provide affordability in perpetuity. Actions by 2027 are:

- Deliver at least 200 new affordable and mid-market rental homes through local authority strategic housing investment plans and affordable housing delivery programmes.
- Use the next Local Development Plan to identify further locations where more than 25% affordable housing is required and bring this up to 75% affordable overall.
- Support communities to deliver community-led housing solutions, including by making the most of powers to buy land and taking a more proactive role in management where appropriate.

C3. Housing and community benefit, seeks to work with communities to ensure that the majority of land allocated for development around villages and towns in the National Park is controlled by communities or public bodies to help manage long-term development needs. It seeks to increase the percentage of developable land in community or public body ownership. While this objective is not wholly housing related, it seeks to increase the contribution that community led housing can make within the National Park. Actions by 2027 are:

- Review options and funding for public sector purchase of allocated development land.
- Support communities to use all possible options to access land for the developments they need.
- The Park Authority led Cairngorms 2030 programme which is taking forward a number of projects that support communities.

Policy C1 is a place policy within the Partnership Plan, which states that the Cairngorms National Park Authority will 'enable sustainable patterns of settlement development, infrastructure and communications while maintaining the integrity of designated sites'. It lists eight criteria by which it will do this, two of which relate to planning for housing. These are (a) consolidating the role of the strategic settlements as the most sustainable places for future growth and the focus for housing land supply; and (b) providing any additional flexibility in future housing land supply at small sites around a wider range of settlements.



Cairngorms National Park Local Development Plan 2021

The Cairngorms National Park Local Development Plan was adopted on 26 March 2021. The Plan focuses on the five-year period until 2025 but includes development proposals for the 10-year period until 2030, as well as providing a general indication of the likely scale and location of development as far as 20 years into the future (2040).

The Plan identifies Housing Supply Targets up to 2030 for each of the constituent local authority areas that make up the park except Angus (Aberdeenshire, Highland, Moray, and Perth and Kinross) and sets out Housing Land Requirements, based on a generosity level of 10% above the Housing Supply Targets, which total 819 housing units over the 10-year period (see Table 4 and Table 5). An indicative Housing Land Requirement target of 648 housing units is provided for 2030 – 2039.

These targets are based on the local authority Housing Need and Demand Assessments, which set out housing need and demand in wider housing market areas which cover the Cairngorms National Park. The Housing Supply Targets are a realistic assumption of what can be delivered, while ensuring a generous supply of land available to ensure that new housing is delivered. The Plan advises that the Housing Need and Demand Assessment process did not identify any need to allocate land in the Cairngorms National Park for Gypsy / Traveller or Travelling Show People accommodation.

Table 4 Cairngorms National Park Local Development Plan 2021 – Housing Supply Target (Table 1, page 26).

Local Authority Area	2020 – 2024			2025 – 2029			2030 – 2039 (Indicative target)		
	Market	Affordable	Total	Market	Affordable	Total	Market	Affordable	Total
Aberdeenshire	40	35	75	26	23	49	47	38	85
Angus	0	0	0	0	0	0	0	0	0
Highland	144	165	309	118	100	218	236	200	436
Moray	18	10	28	14	7	21	22	13	35
Perth and Kinross	13	14	27	9	7	16	18	14	32
Total	215	224	439	167	137	304	323	265	588



Table 5 Cairngorms National Park Local Development Plan 2021 – Housing Land Requirement based on a generosity level of 10% (Table 2, page 26)⁷

Local Authority Area	2020 – 2024	2025 – 2029	2030 – 2039 (indicative target)
Aberdeenshire	83	54	94
Angus	0	0	0
Highland	340	240	480
Moray	31	23	39
Perth and Kinross	30	18	35
Total	484	335	648

The adopted Local Development Plan is accompanied by a suite of supplementary and non-statutory planning guidance to support the delivery of the plan. This includes Housing Supplementary Guidance. This highlights that the Housing Supply Target identifies a need for 489 affordable homes between 2020 and 2029 and that the preferred location for new housing is within the Strategic, Intermediate and Rural Settlements. While the Cairngorms National Park Authority's preference is for affordable housing to be delivered on site, where this is not possible, such as for a development of less than four houses, a financial contribution to provide affordable housing elsewhere may be more appropriate.

The supplementary guidance sets out the commuted sum, per unit, for developments on one to three houses. The level of contribution has been set at 10% of the full market cost of delivering affordable housing, based on a viability study. The supplementary guidance also notes that the Cairngorms National Park has a disproportionately high proportion of larger and detached dwellings, resulting in a housing stock that is poorly equipped to meet arising housing needs. The guidance advises that development should focus on smaller dwellings (one, two and three-bedroom properties); and semi-detached, terraces, or where appropriate, flatted properties as a way of delivering housing that is better targeted to housing need.

⁷ Note: the totals are the sum of each local authority area requirement rather than a 10% increase of the total Housing Supply Target.



Cairngorms National Park Local Development Plan 2021: Delivery Programme 2025

The aim of the Delivery Programme is to achieve the intended outcomes of the Cairngorms National Park Local Development Plan 2021.

As an update and replacement for the Action Programme 2022, it introduces a colour-coded 'delivery pipeline' (section 2); provides details on affordable housing and financial contributions secured through planning permissions (section 3) and provides a greater level of detail on the planning history of each allocated site in each settlement (section 6). A draft version was the subject of consultation with internal officers and key stakeholders (local authorities, landowners, developers and key agencies).

Cairngorms National Park Development Plan Scheme 2024

The Development Plan Scheme for the Cairngorms National Park outlines how planning in the Cairngorms National Park will work. It advises that the next Local Development Plan will cover a 10-year period from around 2027 to 2037 as well as provide a general indication of the likely scale and location of development as far as 20 years beyond that.

Community action plans

The following action plans identified issues and / or priorities relating to housing.

Aviemore, Rothiemurchus and Glenmore Community Action Plan: Looking to 2030

Published in November 2024, this action plan looks beyond the two to three-year timespan of their previous plan to consider where the community wanted to be by 2030.

Under the Socially Connected Community them, one of three priorities is to 'provide housing that people who want to live and work here can afford'. Two projects are identified, as follows:

- Housing must be really 'affordable': mix of shared ownership, social rent, self-build available for our young people and to support key businesses.
 - Important for 'affordable' to relate to local wage levels to support local employment.
 - Include provision for single person accommodation.
 - Incorporate more sheltered / supported housing.
 - Provide care home spaces.
- Lobby for social housing stock to remain in perpetuity.



- Work with Registered Social Landlords to ensure awareness of community's wishes.

Ballater and Crathie Community Action Plan 2023

The community action plan is a five-year plan with strategic projects, a vision and seven focus areas. Focus area 6 is affordable housing. A housing subgroup has been formed. The strategic goal for housing is to identify creative solutions to address housing need and to work with housing associations, local authorities, Cairngorm business partnership, landowners and other appropriate bodies.

Blair Atholl and Struan Community Action Plan: Looking to 2030

Compiled in 2023, the community action plan sets out three themes – a socially connected community, a climate conscious community; and an economically thriving community.

One of the priorities to deliver a socially connected community, is to have affordable places to live. The plan identifies that this requires investment in more affordable housing including dedicated accommodation for key workers in health and education; accommodation to support local businesses; legal conditions to prevent affordable housing reverting to the open market; and identifying properties which are vacant or derelict to try to bring them back into use.

It also proposes to investigate community-owned options for housing development by working with partners, including Cairngorms National Park Authority, to explore possibilities to purchase land at a reasonable price.

Boat of Garten Action Plan: Looking to 2030

Published in spring 2025, the plan sets out the community's vision for the longer term (up to 10 years) with suggestions and possible actions grouped across five specified themes: - a socially connected community; a climate conscious community; an economically thriving community; supporting our young people; and a culturally vibrant community.

A top suggestion under the socially connected community theme, is 'more affordable (rental) housing for local people and businesses'. The proposed action is to investigate options for making more housing available through requesting a housing needs analysis; exploring possible plots and zoned areas for housing; ensuring new housing is affordable and energy efficient; and looking into the need for sheltered housing.



Braemar Community Action Plan 2017

This refreshed version of the 2013 plan has five themes. Theme five sets out the actions for housing and economic development. In relation to housing, a lack of affordable housing, and specifically a lack of accommodation for seasonal employees, is noted as a hindrance to business. Item 37 on the action list is the delivery of lower cost small houses or apartments on the Kindrochit site – but access issues are noted, and the proposal is to identify alternative sites if these issues are not resolved.

Carrbridge Community Action Plan: Looking to 2030

Compiled in spring 2022, the plan contains a vision and priority activity set across four themes. These themes are a socially connected community, a climate conscious community, an economically thriving community, and a culturally vibrant community. A priority under 'an economically thriving community' is for local people to be given affordable housing priority and a need to cap second homes.

Cromdale and Advie Community Action Plan 2013

The Action Plan sets out a number of priorities divided into high, medium and low priority. The construction of houses on local development plan site H1 is listed as a medium priority.

Dalwhinnie Community Action Plan: Looking forward to 2030

Compiled in summer 2023, three themes are identified. Under the 'economically thriving community theme', a priority is to improve opportunities for local development, including addressing planning issues for the village to help proposed business and residential development in and around A889.

Dalnain Bridge Community Action Plan: Looking to 2030

Published in 2025, the community's vision is set across the three themes of a social connected community; a climate conscious community; and a community for our young people. The summary notes that recent successes include new housing for the community. No specific housing priorities are identified for Dalnain Bridge's future. The map indicates that one desired action is to address the issue of holiday / second homes.

Grantown-on-Spey Community Action Plan 2016

There are three central themes in the community action plan – town centre, tourism and community. No specific issues relating to housing are identified.



The Grantown-on-Spey Community Action Plan is currently under review and an updated Action Plan is due to be published later in 2025.

Kincraig and locality Community Action Plan: Looking to 2030

Published in November 2024, the action plan looks beyond the next two to three-year timespan, focusing on what the community wanted to be by 2030. The community includes the villages and settlements of Kincraig, Insh, Dalnavert, Alvie, Feshiebridge, Lynchat, Drumguish, Speybank and Inveruglas.

The plan sets out the community's vision for the longer term (up to ten years) across the four themes of a socially connected community; a climate conscious community; an economically thriving community; and a culturally vibrant community. No specific priority relating to housing is identified.

Kingussie Community Action Plan: Looking to 2030

Published in spring 2025, the suggestions and actions collated from the community are categorised into four themes - a socially connected community; a climate conscious community; an economically thriving community; an economically thriving community; and a culturally vibrant community. Housing related priorities and actions comprise:

- Investigating the feasibility of redeveloping St Vincents for housing (since purchased by The Highland Council for redevelopment into housing).
- Creating more housing for people who want to live and work in Kingussie (with a focus on retaining young people, repurposing unused buildings and changing the use of commercial premises).
- Supporting the redevelopment of Market Stance for affordable housing or local business units.
- Developing Talla Nan Ros into a community space, including exploring the feasibility of conversion for housing, multi-media and retail.

Laggan Community Action Plan: Looking to 2030

Compiled in autumn 2022, there are three themes - a socially connected community; a climate conscious community; and an economically thriving community. Under the socially connected community theme, one of the priorities is 'having affordable places to live'. This is defined as access to more community-owned affordable housing for local young people to rent or buy; and community support to help residents and businesses make their homes more energy efficient / better insulated.



To achieve access to more affordable housing, the listed actions are to explore potential sites in the area (including LFT land for housing / crofts); publish a timeline for an existing housing feasibility study; and to lobby Cairngorms National Park Authority to allow small group housing development.

Mount Blair Community Action Plan 2013 – 2018

Note that the majority of the action plan area is outwith the Cairngorms National Park. The action plan community vision is to make it sustainable to live and work in the area, with good access to affordable housing, vital services and community facilities with good communication and transport systems.

Nethy Bridge Community Action Plan: Looking to 2030

Compiled in autumn / winter 2023. There are four themes - a socially connected community; a climate conscious community; an economically thriving community; and a culturally vibrant community. The first priority under 'a socially connected community' is to create more housing for people who want to live and work in Nethy Bridge. There are three aims.

The first is that a good portion of any new housing must be 'affordable' for rent or purchase and available to permanent residents and to retain key workers. It states that 25 – 40% affordable housing is not enough and there is support for the Cairngorms National Park Authority's Partnership Plan objective of up to 75%. It also states that on Nethy Bridge Proposal H1, there needs to be a push for the majority of the development to be affordable, well-built and insulated – and occupied by full time residents.

The second is to investigate community-owned housing projects, like Braemar and Tomintoul. Nethy Bridge Community Development Company will work with the Communities Housing Trust to identify suitable opportunities and evidence need for different housing types – for example, shared equity and mid-market rentals. In addition, to investigate a community asset transfer for provision of affordable housing for locals with the public sector, Royal Society for the Protection of Birds and private landowners.

The third is to hold on to the social housing stock they do have, working with registered social landlords.

Newtonmore Community Action Plan: Looking to 2030

Compiled in spring 2022, the community action plan has four themes. Under the 'an economically thriving community' theme, the first priority is to 'improve support and assistance for local businesses and people trying to get to work'. This priority is for local



people to be given affordable housing priority, but also for older locals who are downsizing. It aims for more social housing for young people and families and a cap on second homes. It recognises that there needs to be a balance between welcoming those with holiday homes and having accommodation for key workers in the tourism sector.

Strathdon Community Action Plan 2016

This community action plan has nine themes. Theme 9 is housing and resident support. The plan notes that many people, especially farmers and estate workers live in house that are tied to their employment. Outwith these, a range of residents, particularly younger people and those with young families, indicates that suitable housing, to either rent or buy, was not affordable relative to local incomes. The plan sets short-term actions to identify a group to explore housing availability and condition issues and need and to explore options for the use of derelict properties / sites.

Strathdon Community Action Plan is currently under review and an updated Action Plan is due to be published later in 2025.

More information on the Community Action Plans in the National Park can be found here:

- <https://cairngorms.co.uk/our-work/community-action-planning>



Baseline of housing matters

This section summarises the following housing matters:

- Population estimates and projections
- Household estimates and projections
- House prices
- Housing stock characteristics
- Ineffective stock, including second homes
- Short-term lets
- Housing completions
- Effective housing land supply
- Housing need and demand, including affordable housing need
- Local housing land requirement
- Specialist housing need
- Rural housing, including resettlement and fragile communities
- Housing delivery
- Housing in town centres
- Self-build housing.

There are links between this policy area and all other policy areas covered in the Evidence Report. Connections between relevant policy areas are highlighted throughout the topic paper.

Demographic context

Population

Based on Scotland's Census, the estimated population of the Cairngorms National Park in 2022 was around 17,500 people. This is lower than the estimate in 2011, which was around 19,000 (Figure 2). However, there are several important caveats to consider when comparing these datasets, namely:

- The fact that the National Park is a non-standard geography.
- Issues with the communal establishment usual population estimate in the 2011 census.

Information on these issues is presented within this supporting document (see page 16):

- <https://cairngorms.co.uk/uploads/documents/Local-Development-Plan-Evidence-Report/Supporting-Documents/Statistical-areas-used-in-the-analysis-of-the-Cairngorms-National-Park.pdf>



The outcome of these issues is that while we may identify changes between censuses, there is uncertainty about the exact extent of those changes. Some comparisons may not be possible at all.

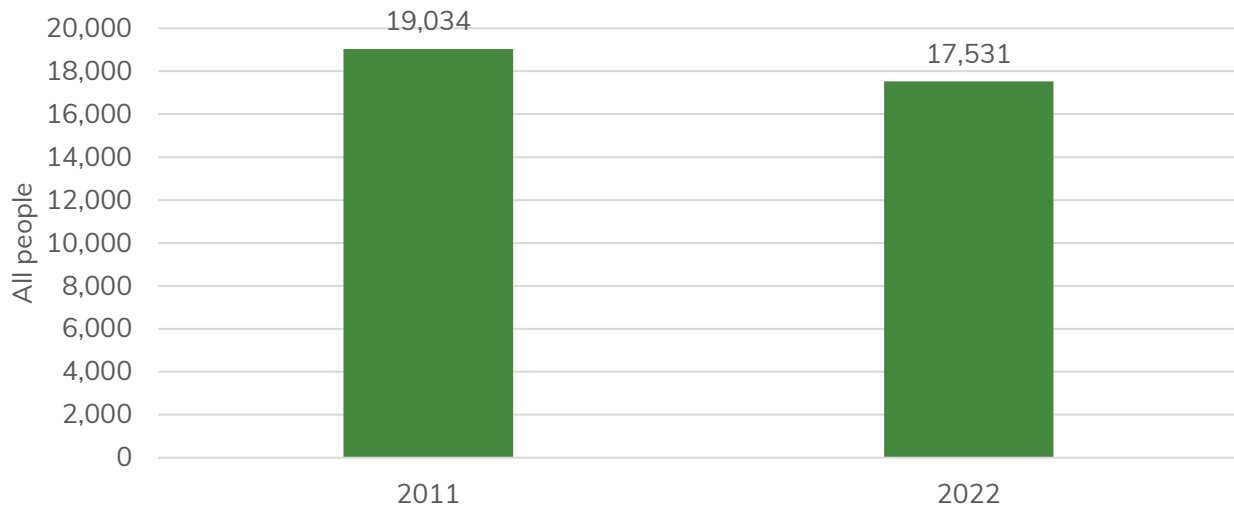


Figure 2 Population estimates for the Cairngorms National Park according to Scotland's Census, 2011 and 2022 (Tables LC1117SC: 2011 and UV102b: 2022).

Rebased mid-year population estimates for small areas were published in 2025 and these may be used to provide an indication of population change at a sub-National Park level over the period 2001 – 2022 (Figure 3).

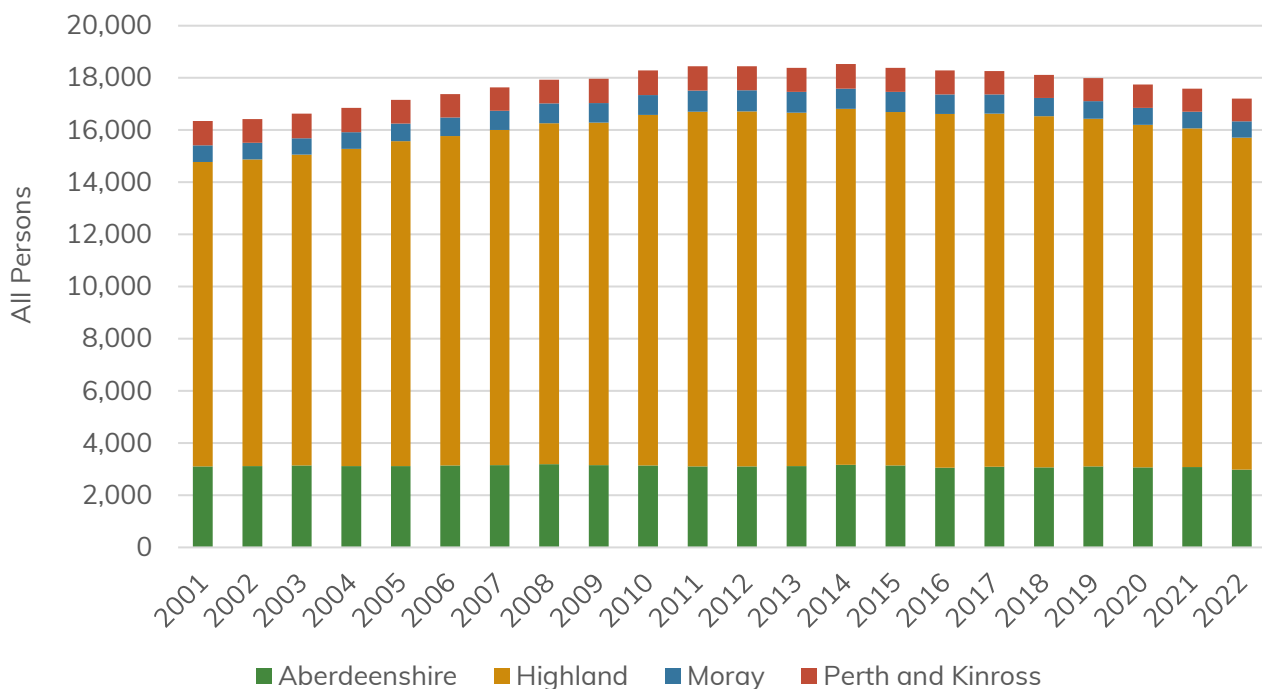


Figure 3 Small area mid-year population estimates for the Cairngorms National Park, by constituent local authority area 2001 to 2022, according to Scotland's Census, 2011 and 2022 (National Records Scotland population estimates 2001 – 2011 and rebased population estimates 2011 - 2022).



The National Park's population is unusual in that it is small and dispersed and is in clusters around the edge of the Cairngorms land mass within the council areas of Highland, Aberdeenshire, Angus, Moray and Perth and Kinross. Around 74% (12,729 people in 2022) of the population lives in the Badenoch and Strathspey ward within Highland Council.

The rebased mid-year estimates indicate that the Cairngorms National Park population has grown by 5.27% since 2001 (to 2022), which is lower than for Scotland as a whole (7.56% for the same period). In addition, growth peaked at 13.37% in 2014, since which the estimated population has reduced (Figure 4).

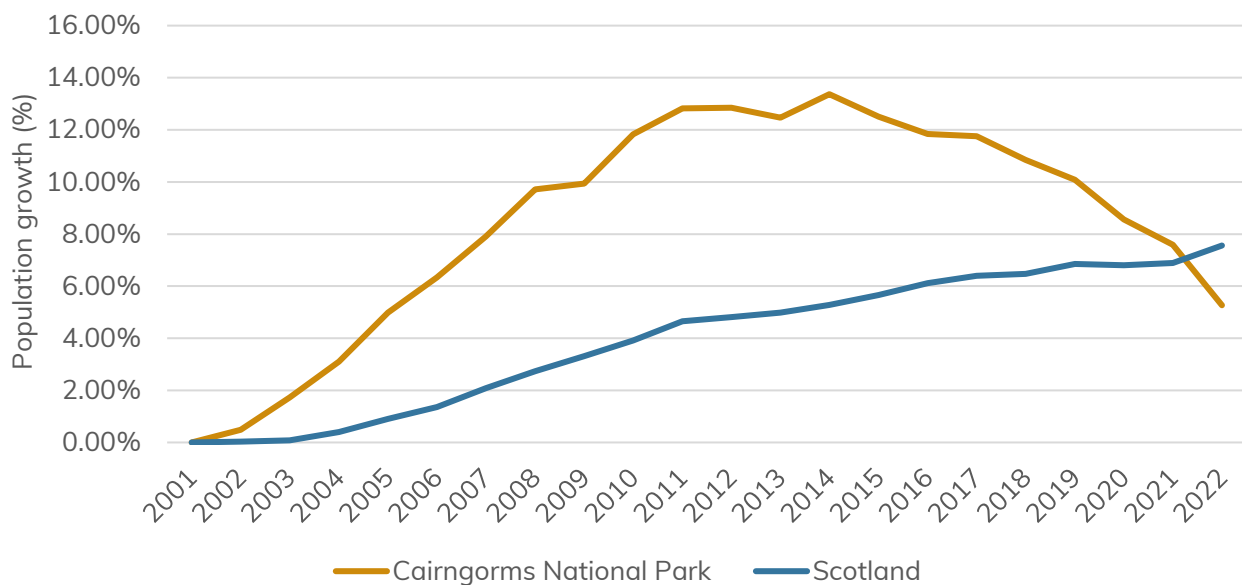


Figure 4 Comparison of population growth (%) in the National Park and Scotland, using the mid-year estimates between 2001 - 2022, from the 2001 baseline figure, with 2011 - 2022 estimate rebased in 2025 (statistics.gov.scot).

This population change has not been even across all local authority areas within the National Park. The Aberdeenshire, Angus, Moray and Perth and Kinross parts of the National Park have reduced slightly (by -4.05%, -2.84% and -5.59% respectively), while the Highland area has seen an estimated increase of 9.06% (1,057 people) between 2001 and 2022. This is also where the greatest housing pressures are and where most future development is likely to be located.

The components of this population change can be calculated for the years 2002-2019 (Table 6 and Figure 5). This shows that deaths have exceeded births every year of this period and that the National Park's population growth is driven by migration. Over this period, the population grew by around 10% but would have fallen by around 5.4% had no migration taken place.



Table 6 Components of population change in the Cairngorms National Park between 2001 – 2019 (statistics.scot.gov – 2025 rebased estimates 2011 - 2022).

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Births	138	129	125	131	146	145	151	175	161	147	152
Deaths	195	184	208	217	185	217	181	228	177	181	202
Natural change (births - deaths)	-57	-55	-83	-86	-39	-72	-30	-53	-16	-34	-50
Mid-year estimates	16,346	16,426	16,628	16,853	17,161	17,381	17,638	17,933	17,971	18,280	18,443
Gross annual population change		80	202	225	308	220	257	295	38	309	163
Net-migration		135	285	311	347	292	287	348	54	343	213

	2012	2013	2014	2015	2016	2017	2018	2019	Change 2001 - 2019	Total 2011 - 2019
Births	152	151	137	134	141	137	118	125	2,557	1,247
Deaths	171	214	175	182	184	205	152	185	3,448	1,670
Natural change (births - deaths)	-19	-63	-38	-48	-43	-68	-34	-60	-891	-423
Mid-year estimates	18,446	18,384	18,531	18,390	18,281	18,267	18,118	17,995		
Gross annual population change	3	-62	147	-141	-109	-14	-149	-123	1,649	-285
Net-migration	22	1	185	-93	-66	54	-115	-63	2,540	138

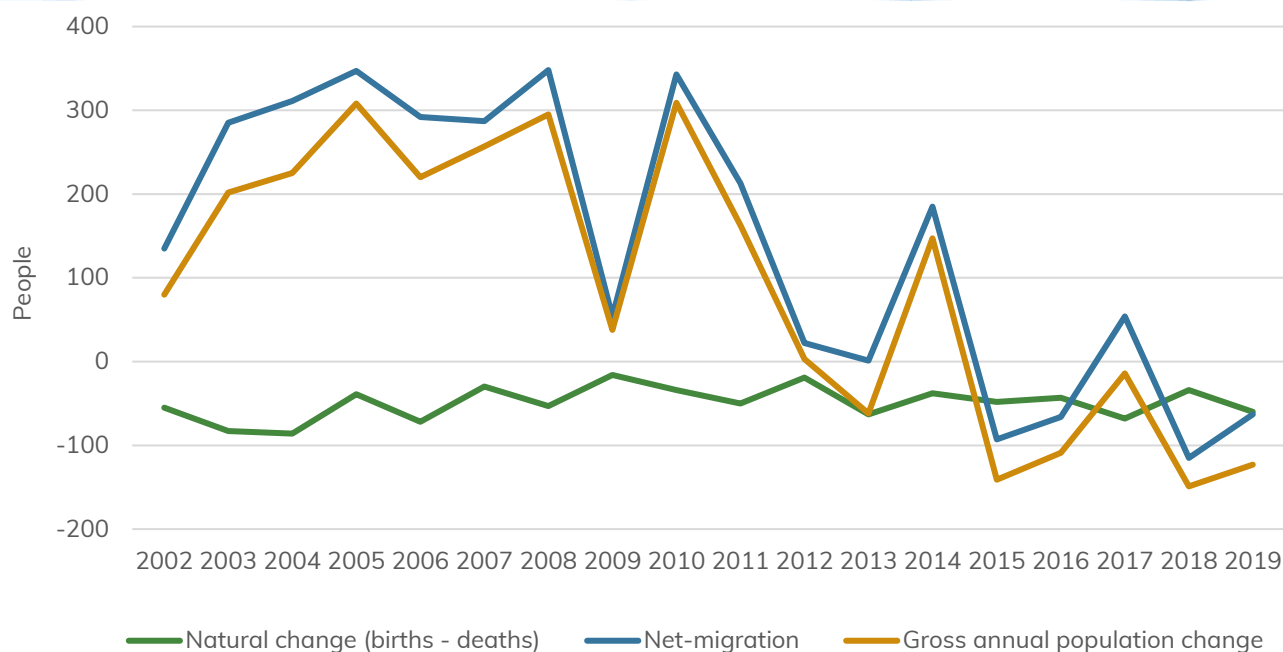


Figure 5 Gross annual population change and its constituent components in the Cairngorms National Park from 2002 - 2019 (statistics.gov.scot).

A more detailed analysis of population shrinkage is covered under this topic paper's section on resettlement and fragile communities (see page 156).

Population projections

Population projections for the National Park are produced by National Records of Scotland, with the most recent being 2018 based projections (Figure 6). National Records of Scotland prepare a range of projections, based on past trends. The projections use three different levels of migration, known as 'low migration', 'principal' and 'high migration'. The principal projection for the Cairngorms National Park is that between 2018 and 2043, the population will grow from 19,045⁸ to 19,961, an increase of 4.8% over 25 years. The high migration projection is that the population will increase to 20,381 (an increase of 7%).

⁸ The reason that the National Records Scotland' population estimate for 2018 is higher than the 2022 mid-year estimate quoted above is due to differences in the way small population areas are aggregated. See footnote 2 and the background paper on the statistical areas used in the analysis of the Cairngorms National Park for details: <https://cairngorms.co.uk/uploads/documents/Local-Development-Plan-Evidence-Report/Supporting-Documents/Statistical-areas-used-in-the-analysis-of-the-Cairngorms-National-Park.pdf>

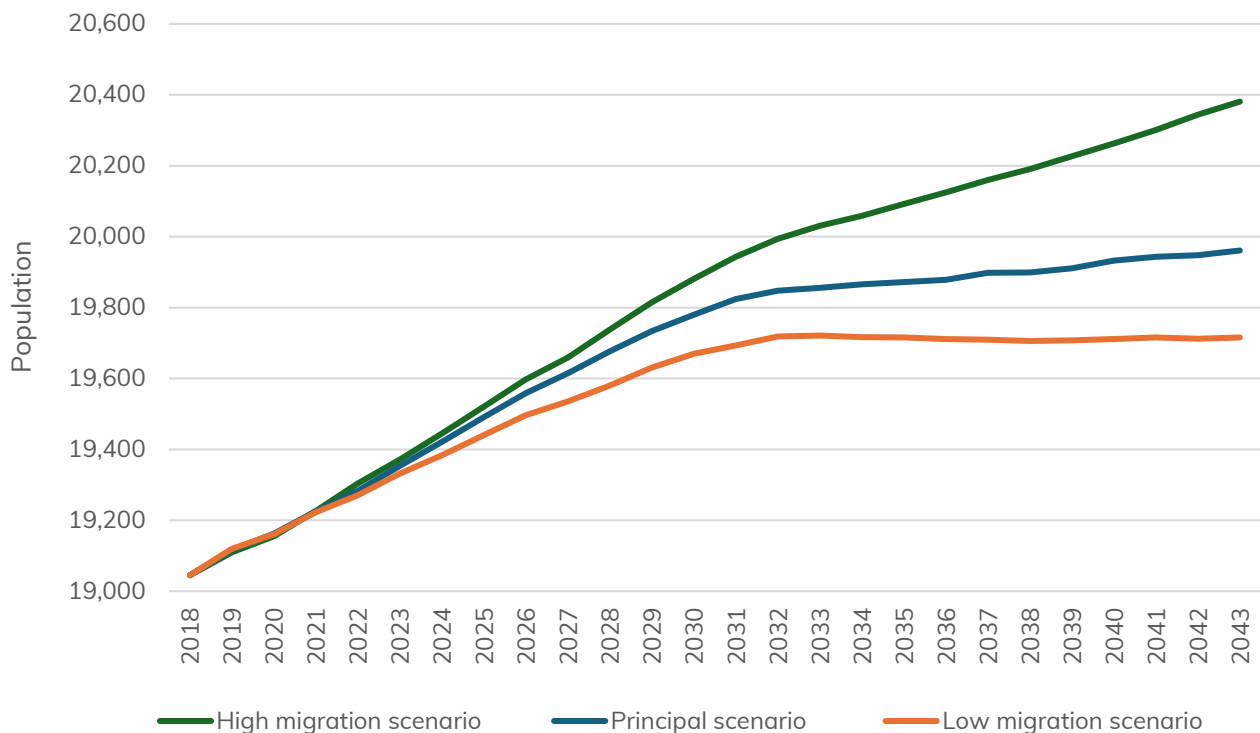


Figure 6 Population projections –projected population growth in the Cairngorms National Park from 2018-2043 under the low migration, principal and high migration projection scenarios (statistics.gov.scot).

This projection contrasts with the 2016 based projection, which projected a decrease of around 4% between 2016 and 2041. This highlights the limitations of population projections, especially in an area such the Cairngorms National Park, which has a small population.

Within the anticipated 10-year period of the new Local Development Plan (2027 – 2037), the 2018-based principal scenario population projection forecasts a population increase of 283 people (from 19,615 to 19,898).

A projection is a calculation showing what happens if assumptions are made. The population projections are trend-based. They are not policy-based forecasts of what the government expects to happen. Many social and economic factors influence population change, including policies adopted by both central and local government. The relationships between the various factors are complex and largely unknown.

Within the Cairngorms National Park, migration assumptions are more critical than the fertility and mortality assumptions.



The National Records of Scotland data also give an indication of how the age structure of the population is likely to change (Figure 7). According to the principal migration scenario:

- The number of children aged under 16 years is projected to decrease by 19.7% from 2,828 in 2018 to 2,272 in 2043. In comparison, across Scotland, the number of children under 16 years is projected to decrease by 10.5%. The decrease in the Cairngorms National Park between 2027 and 2037 is projected to be 93 children (4%).
- The number of people of working age is projected to decrease from 11,588 in 2018 to 10,916 in 2043, representing a 5.8% reduction. The number of people of working age in Scotland is expected to decrease by 3.8%. The decrease in the Cairngorms National Park between 2027 and 2037 is projected to be 533 working age people (5%). and
- The population of people of pensionable age is projected to rise by 46.3% from 4,629 in 2018 to 6,773 in 2043. Across Scotland, the population of pensionable age in the is expected to rise by 35.5%. The increase in the Cairngorms National Park between 2027 and 2037 is projected to be 909 people of pensionable age (16%).

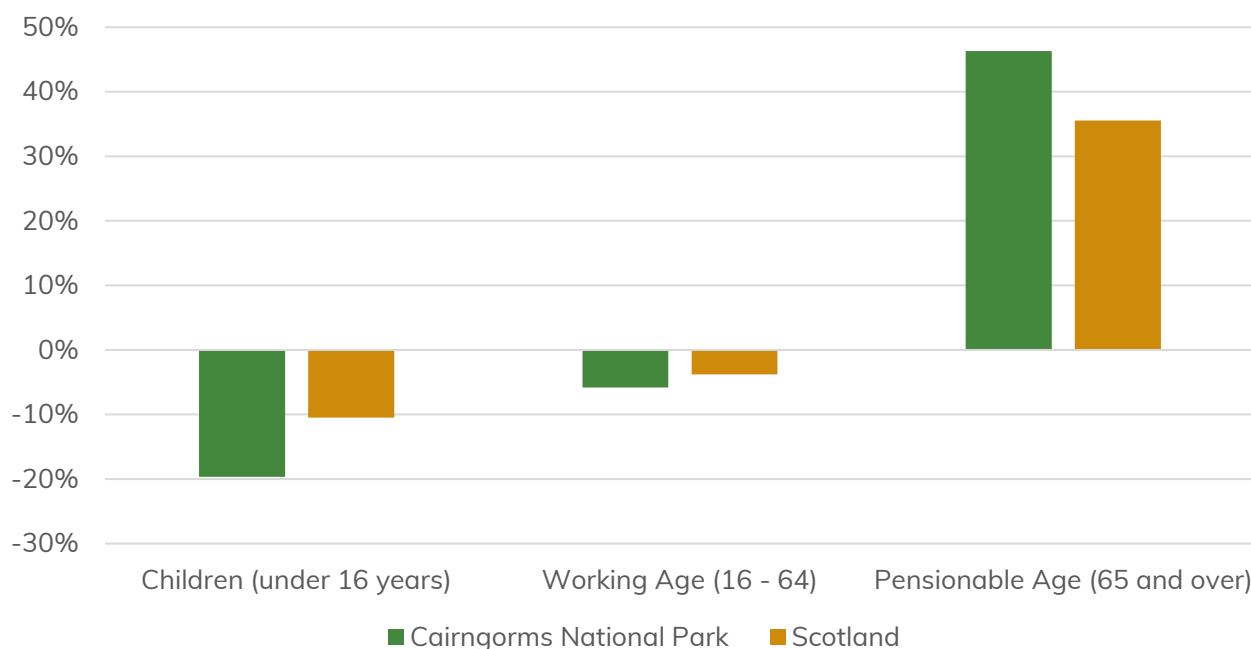


Figure 7 Comparison of the estimated percentage change in population, by age group cohort, in the Cairngorms National Park and Scotland between 2018 and 2043 (statistics.gov.scot).

Figures 8 and 9 show the estimated population profile by age and gender in the Cairngorms National Park in 2018 and 2043. Under this estimate, 34% of the population



of the Cairngorms National Park would be over-65 in 2043, and 12% over 80 (an increase of 123%).

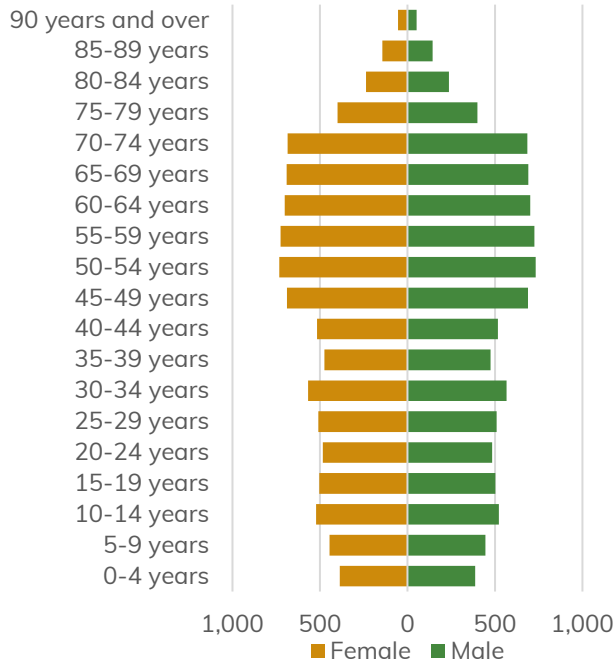


Figure 8 2018 estimated population profile by age and gender in the Cairngorms National Park (statistics.gov.scot).

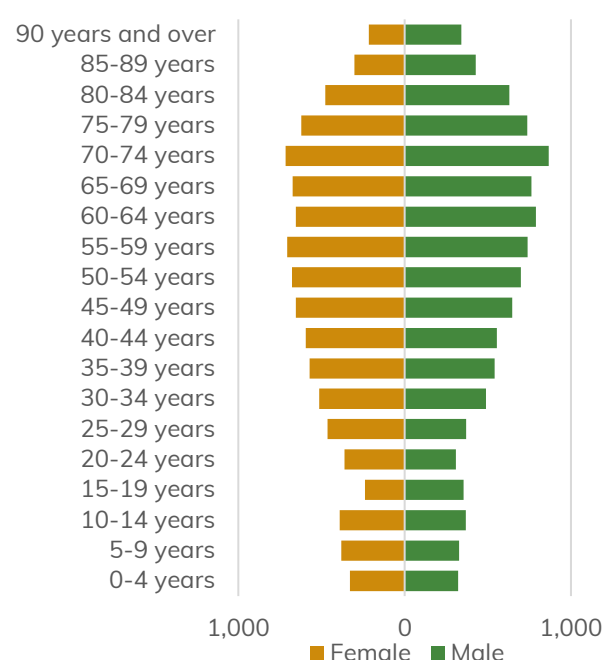


Figure 9 2043 estimated population profile by age and gender in the Cairngorms National Park (statistics.gov.scot).

New population projections are due to be published by National Records Scotland later in 2025. The implications of any new data will be considered during the preparation of the proposed plan.

Households

According to Scotland's Census, the estimated number of households in the Cairngorms National Park remained relatively stable between 2011 and 2022 at around 8,450 households (Figure 10). The size of households has fallen, with an increase in the number of one and two person households (Figure 11). This represents a fall in the average household size from around 2.25 in 2011 to around 2.07 in 2022. This compares to fall across Scotland from around 2.23 to around 2.17 over the same period.

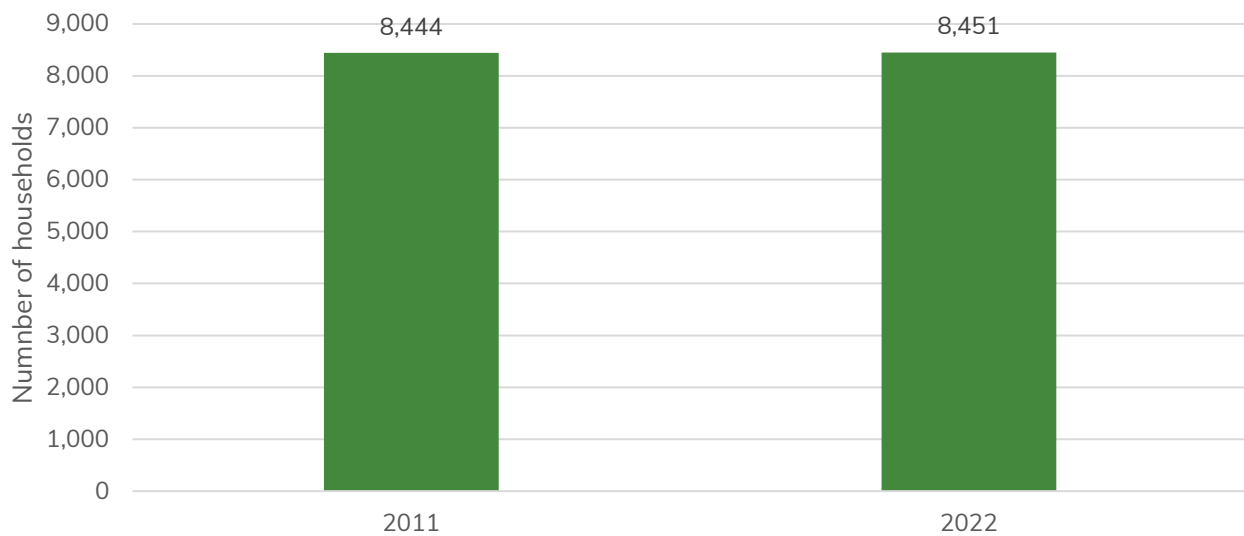


Figure 10 Estimated number of households in the Cairngorms National Park 2011 – 2022 (Census tables KS105CS and UV113).

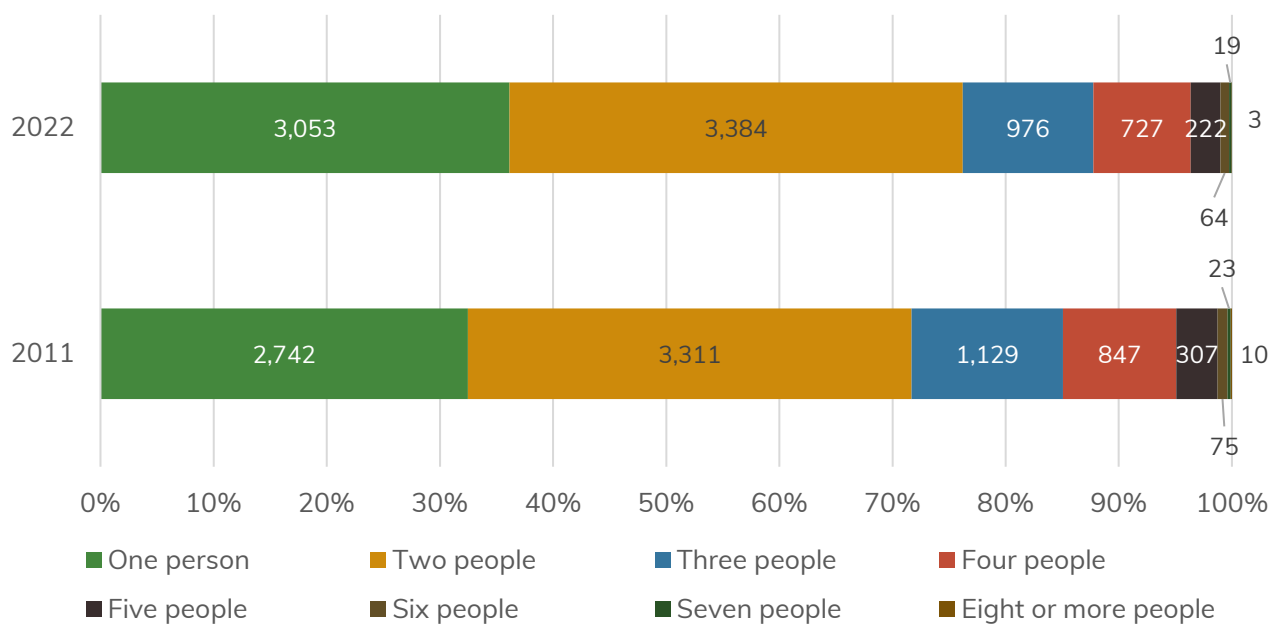


Figure 11 Estimated size of households in the Cairngorms National Park 2011 – 2022 (Census tables QS406 SC and UV406).

The National Record for Scotland's 2018-based household principal scenario projection estimates that the number of households in the Cairngorms National Park will increase by 14.8% between 2018 and 2043. The high migration scenario predicts an increase of 16%.



Note that these figures are significantly higher than the population growth (4.5% for the principal scenario, 7.0% for the high migration scenario) predicted over the same period. This is because average household size is expected to fall.

The decreasing average household size is reflected in the changes in the number of households in each household type (Table 7 and Figure 12). Single adult households represent the largest projected change, anticipated to increase by around 27% by 2043, while two-adult households are expected to increase by around 18%. This compares to a projected decrease in the number of households containing children.

A likely driver in the number of households without children, and of decreasing household size, is the growth in the number of older people – because people are living longer. The gap between the average life expectancy of men and women in Scotland is also narrowing. This means that the number of older men living alone is projected to increase more rapidly than the number of older women.

Table 7 Household projections for the Cairngorms National, by type of household, principal scenario 2018 and 2043 (statistics.gov.scot).

Household Type	2018	2043	Change 2018-2043	
1 adult	2,804	3,560	+756	27.0%
2 adults	3,251	3,821	+570	17.5%
1 adult with children	433	425	-8	-1.8%
2+ adults with children	1,588	1,535	-53	-3.3%
3+ adults	606	622	16	2.6%
All households	8,682	9,963	+1,281	14.8%

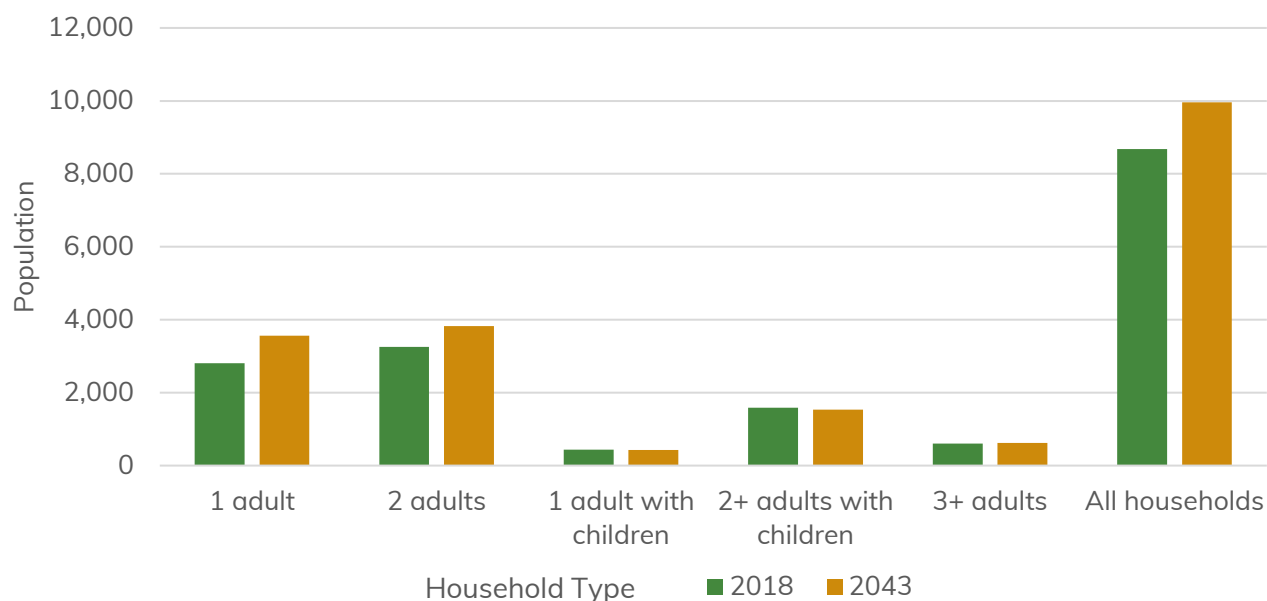


Figure 12 Household projections for the Cairngorms National, by type of household, principal scenario 2018 and 2043 (statistics.gov.scot).

Table 8 shows the household projections for the Cairngorms National Park under the high migration scenario. While there would be no actual decrease in the '1 adult with children' category, the proportional growth is similar, and the overall household growth would be 16%.

Table 8 Household projections for the Cairngorms National Park, by type of household, high migration scenario 2018 and 2043 (statistics.gov.scot).

Household Type	2018	2043	Change 2018-2043	
1 adult	2,804	3,570	+766	27.3%
2 adults	3,251	3,849	+598	18.4%
1 adult with children	433	440	+7	1.6%
2+ adults with children	1,588	1,585	-3	-0.2%
3+ adults	606	631	25	4.1%
All households	8,682	10,075	+1,393	16.0%

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



In the 10-year period of the new Local Development Plan (2027 – 2037), the number of households is projected to increase by 487.

New household projections are due to be published by National Records Scotland later in 2025. The implications of any new data will be considered during the preparation of the proposed plan.

Housing market context

Lower quartile and median house prices

Between 1993 and 2023, the median price of a dwelling in Scotland rose from £46,000 to £185,000, an increase of around 300%. In the same period, the median house price of a property in the Cairngorms National Park increased by around 375% from £56,000 to £265,750.

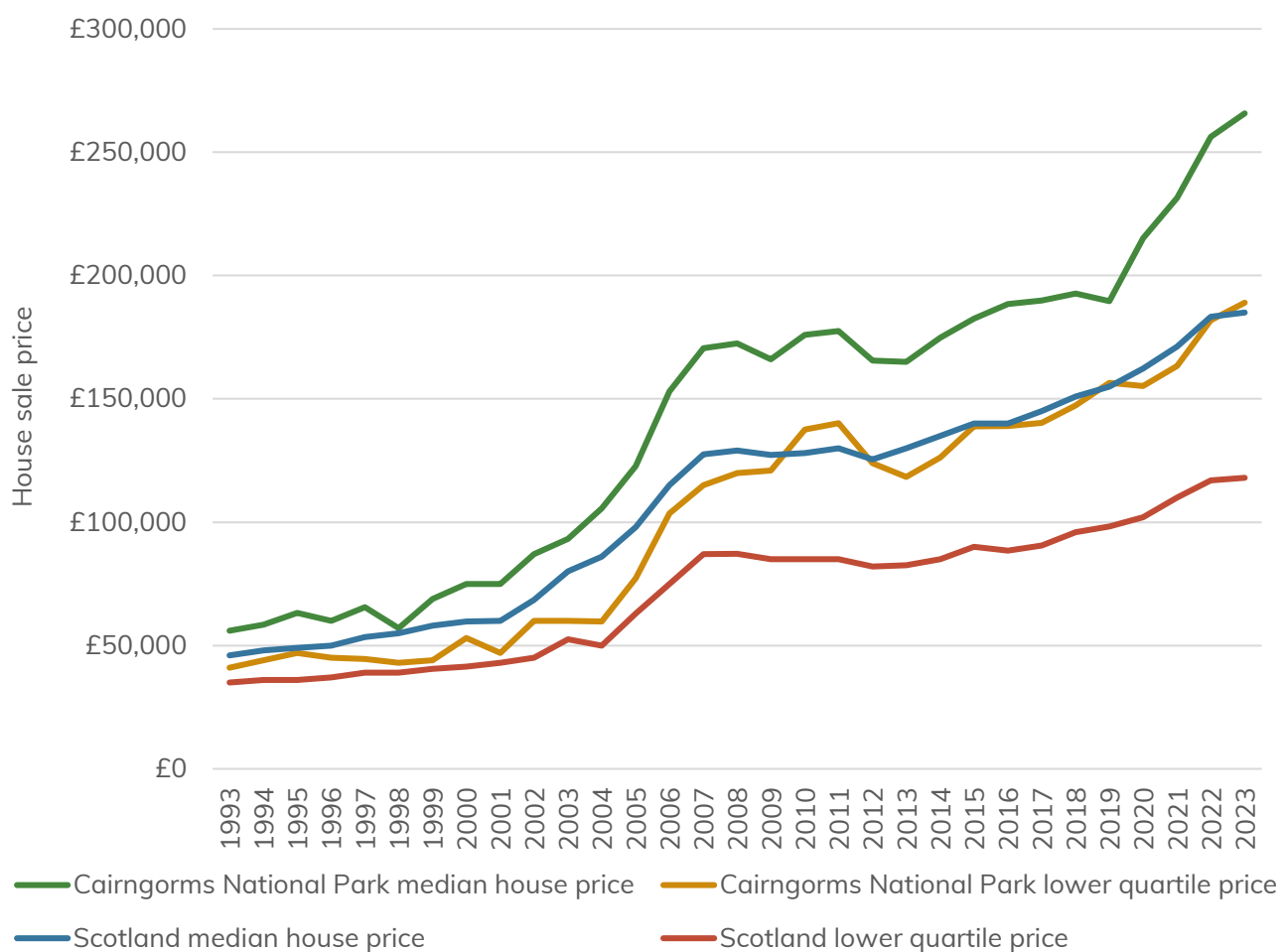


Figure 13 Median and lower quartile house prices for both the Cairngorms National Park and Scotland between 1993 and 2023 (statistics.gov.scot).



Figure 13 shows this increase diagrammatically, with median house prices in the National Park and Scotland increasing at a broadly similar rate between 1993 and 2004 and 2009 and 2019, but greater growth in the Cairngorms National Park between 2005 and 2008 and between 2020 and 2023. The 2020 – 2023 growth is likely caused by pandemic driven counter urbanisation (the movement of people from urban to rural areas) and mirrors the trend seen across the United Kingdom for price rises in rural and coastal areas of high amenity value⁹.

Median house prices 2023

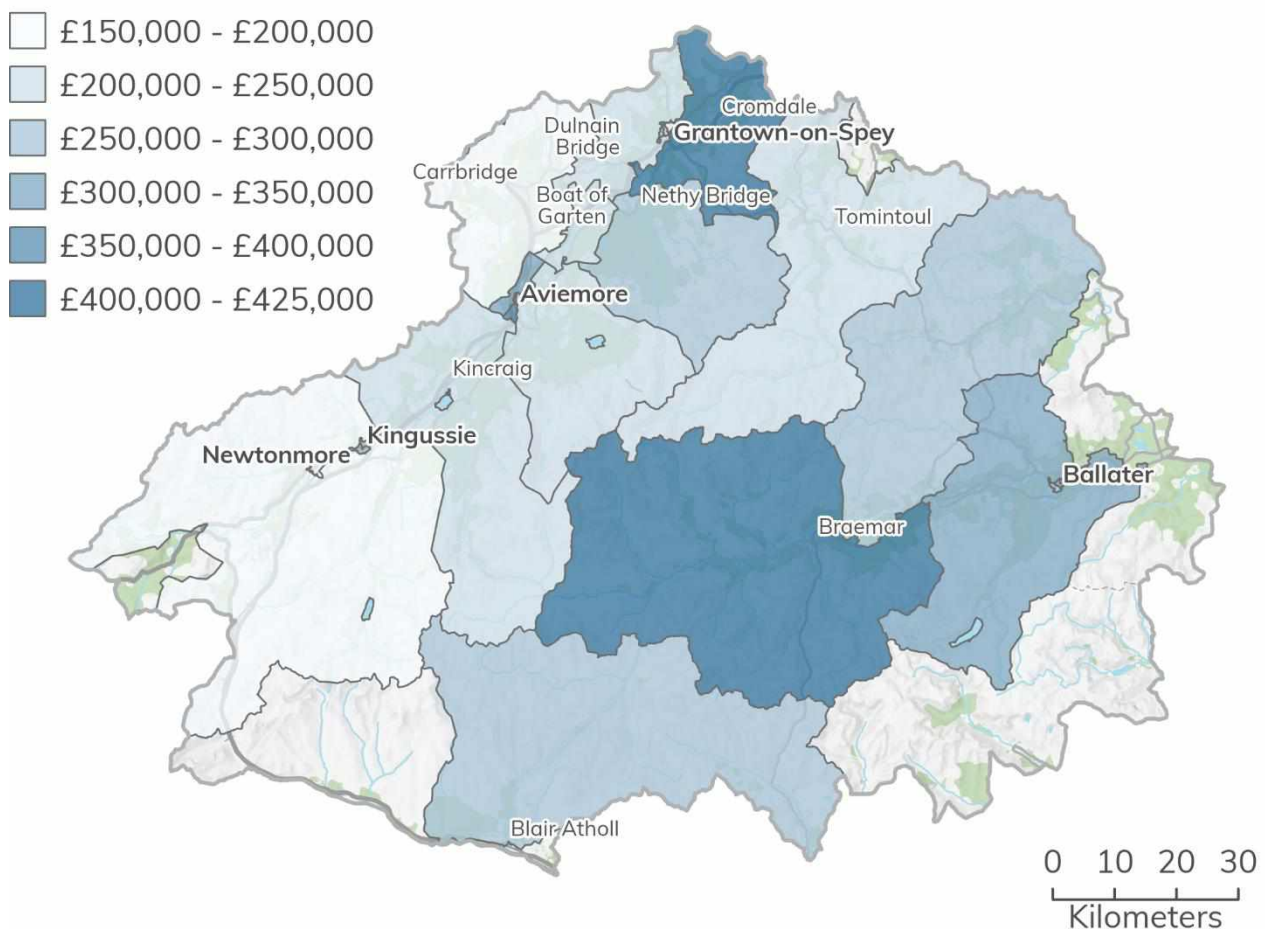


Figure 14 Median house prices by 2011 data zone in the Cairngorms National Park 2023. Reproduced by permission of Ordnance Survey on behalf of His Majesty's Stationery Office. © Crown copyright and database right 2025. All rights reserved. Ordnance Survey Licence number AC0000821810, Cairngorms National Park Authority. Contains data © statistics.gov.scot, 2025.

Lower quartile house prices in Scotland rose from £35,000 in 1993 to £118,000 in 2023. This is an increase of around 235%, lower than the median house price rise across

⁹ Rural planning in the 2020s: technical report 2 – Analysis of rural housing market change, Royal Town Planning Institute (June 2022).



Scotland, indicating a broader spread of house prices. In the Cairngorms National Park however, the increase has been significantly greater, and similar to the growth in the median house price. The lower quartile house price has increased by around 360% from £41,000 in 1993 to £189,000 in 2023 (Figure 13).

Lower quartile house prices 2023

- £125,000 - £150,000
- £150,000 - £175,000
- £175,000 - £200,000
- £200,000 - £250,000
- £250,000 - £300,000

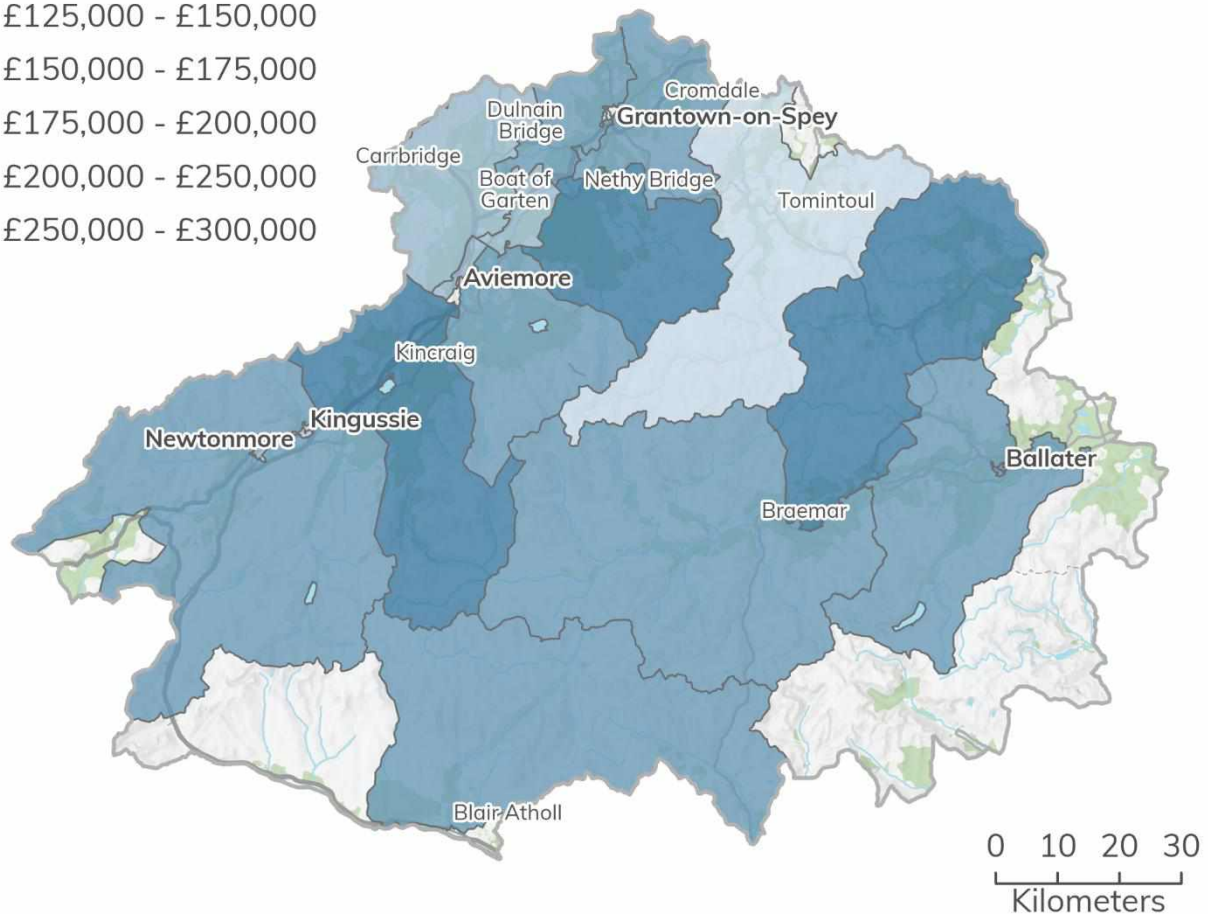


Figure 15 Lower quartile house prices by 2011 data zone in the Cairngorms National Park 2023. Reproduced by permission of Ordnance Survey on behalf of His Majesty's Stationery Office. © Crown copyright and database right 2025. All rights reserved. Ordnance Survey Licence number AC0000821810, Cairngorms National Park Authority. Contains data © statistics.gov.scot, 2025.



Table 9 and Table 10 tabulate the growth in both the lower quartile and median house prices in the Cairngorms National Park and Scotland as a whole.



Table 9 Comparison of Cairngorm National Park and Scotland annual lower quartile house prices between 1993 and 2023 (statistics.gov.scot).

Year	Cairngorms National Park lower quartile house price	Growth in Cairngorm National Park lower quartile house price since 1993	Scotland lower quartile house price	Growth in Scotland lower quartile house price since 1993	Percentage difference between Cairngorm National Park and Scotland lower quartile house price
1993	£41,000		£35,000		17.1%
1994	£44,000	7.3%	£36,000	2.9%	22.2%
1995	£47,000	14.6%	£36,000	2.9%	30.6%
1996	£44,999	9.8%	£37,100	6.0%	21.3%
1997	£44,500	8.5%	£39,000	11.4%	14.1%
1998	£43,000	4.9%	£39,000	11.4%	10.3%
1999	£44,000	7.3%	£40,500	15.7%	8.6%
2000	£53,000	29.3%	£41,500	18.6%	27.7%
2001	£47,000	14.6%	£43,000	22.9%	9.3%
2002	£60,000	46.3%	£45,000	28.6%	33.3%
2003	£60,000	46.3%	£52,500	50.0%	14.3%
2004	£59,763	45.8%	£50,000	42.9%	19.5%
2005	£77,225	88.4%	£63,000	80.0%	22.6%
2006	£103,506	152.5%	£75,000	114.3%	38.0%
2007	£115,000	180.5%	£87,000	148.6%	32.2%
2008	£119,875	192.4%	£87,121	148.9%	37.6%
2009	£120,875	194.8%	£85,000	142.9%	42.2%
2010	£137,500	235.4%	£85,000	142.9%	61.8%
2011	£140,125	241.8%	£85,000	142.9%	64.9%
2012	£123,875	202.1%	£82,000	134.3%	51.1%
2013	£118,375	188.7%	£82,500	135.7%	43.5%
2014	£126,199	207.8%	£85,000	142.9%	48.5%
2015	£138,813	238.6%	£90,000	157.1%	54.2%
2016	£139,000	239.0%	£88,500	152.9%	57.1%
2017	£140,313	242.2%	£90,500	158.6%	55.0%
2018	£147,375	259.5%	£96,000	174.3%	53.5%
2019	£156,538	281.8%	£98,249	180.7%	59.3%
2020	£155,250	278.7%	£102,000	191.4%	52.2%
2021	£163,375	298.5%	£110,000	214.3%	48.5%
2022	£181,875	343.6%	£117,000	234.3%	55.4%
2023	£189,000	361.0%	£118,000	237.1%	60.2%



Table 10 Comparison of Cairngorm National Park and Scotland annual median house prices between 1993 and 2023 (statistics.gov.scot).

Year	Cairngorms National Park median house price	Growth in Cairngorm National Park median house price since 1993	Scotland median house price	Growth in Scotland median house price since 1993	Percentage difference between Cairngorm National Park median and Scotland median house price
1993	£56,000		£46,000		21.7%
1994	£58,500	4.5%	£48,000	4.3%	21.9%
1995	£63,250	12.9%	£49,000	6.5%	29.1%
1996	£60,000	7.1%	£50,000	8.7%	20.0%
1997	£65,500	17.0%	£53,400	16.1%	22.7%
1998	£57,000	1.8%	£55,000	19.6%	3.6%
1999	£68,876	23.0%	£58,000	26.1%	18.8%
2000	£75,000	33.9%	£59,750	29.9%	25.5%
2001	£75,000	33.9%	£60,000	30.4%	25.0%
2002	£87,000	55.4%	£68,500	48.9%	27.0%
2003	£93,250	66.5%	£80,053	74.0%	16.5%
2004	£105,563	88.5%	£86,000	87.0%	22.7%
2005	£122,750	119.2%	£98,000	113.0%	25.3%
2006	£153,000	173.2%	£115,000	150.0%	33.0%
2007	£170,500	204.5%	£127,450	177.1%	33.8%
2008	£172,500	208.0%	£129,000	180.4%	33.7%
2009	£166,000	196.4%	£127,233	176.6%	30.5%
2010	£176,000	214.3%	£128,000	178.3%	37.5%
2011	£177,500	217.0%	£129,995	182.6%	36.5%
2012	£165,500	195.5%	£125,500	172.8%	31.9%
2013	£164,975	194.6%	£130,000	182.6%	26.9%
2014	£174,750	212.1%	£135,000	193.5%	29.4%
2015	£182,500	225.9%	£140,000	204.3%	30.4%
2016	£188,500	236.6%	£140,000	204.3%	34.6%
2017	£189,875	239.1%	£145,000	215.2%	30.9%
2018	£192,750	244.2%	£151,000	228.3%	27.6%
2019	£189,563	238.5%	£155,000	237.0%	22.3%
2020	£215,083	284.1%	£162,261	252.7%	32.6%
2021	£231,500	313.4%	£171,225	272.2%	35.2%
2022	£256,250	357.6%	£183,300	298.5%	39.8%
2023	£265,750	374.6%	£185,000	302.2%	43.6%



Figure 16 illustrates the range of median house prices across the Cairngorms National Park data zones for each year from 1993 – 2023. It shows that there is considerable variation in house prices within the National Park, and that the variation in house prices has widened, particularly within the upper quartile.

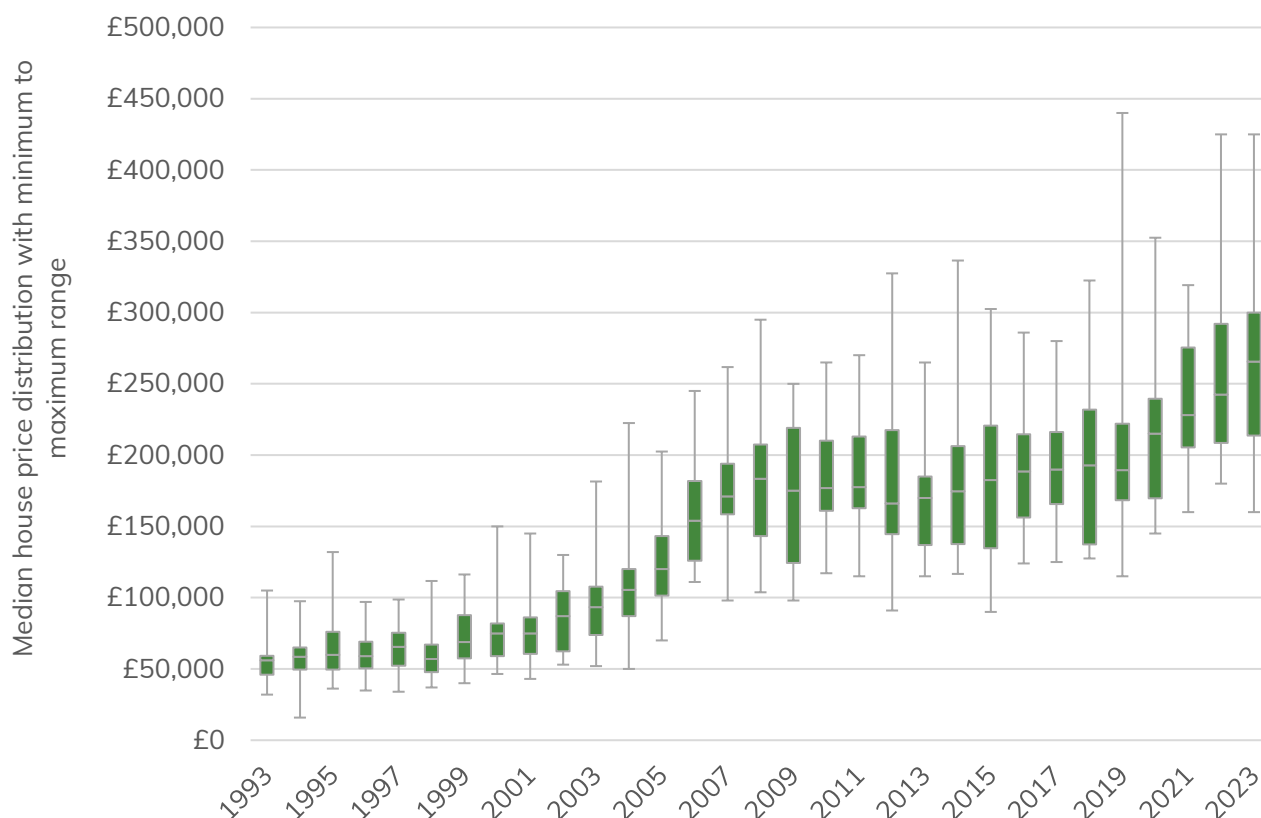


Figure 16 Box plots of median house prices for data zones within the Cairngorms National Park 1993 – 2023 (Statistics.gov.uk¹⁰).

House price / income

Higher house prices are significantly impacting on affordability in the National Park. Figure 17 shows that the increase in the median house price has been far greater than the increase in the median gross household income. The 2021 median house price to median gross income ratio is nearly six times in the National Park compared to the Scottish equivalent ratio of 4.2.

In 2003, a theoretical annual income of £23,979 was needed to purchase a property at this level (based on standard lending calculations) but in 2023 this had increased to

¹⁰ The median house price is the midpoint between the highest and lowest house prices recorded in the National Park.



£68,336. However, the actual median gross income in 2023 was around £42,500¹¹ meaning there was a shortfall of around £28,800 in the income required to be able to purchase a home.

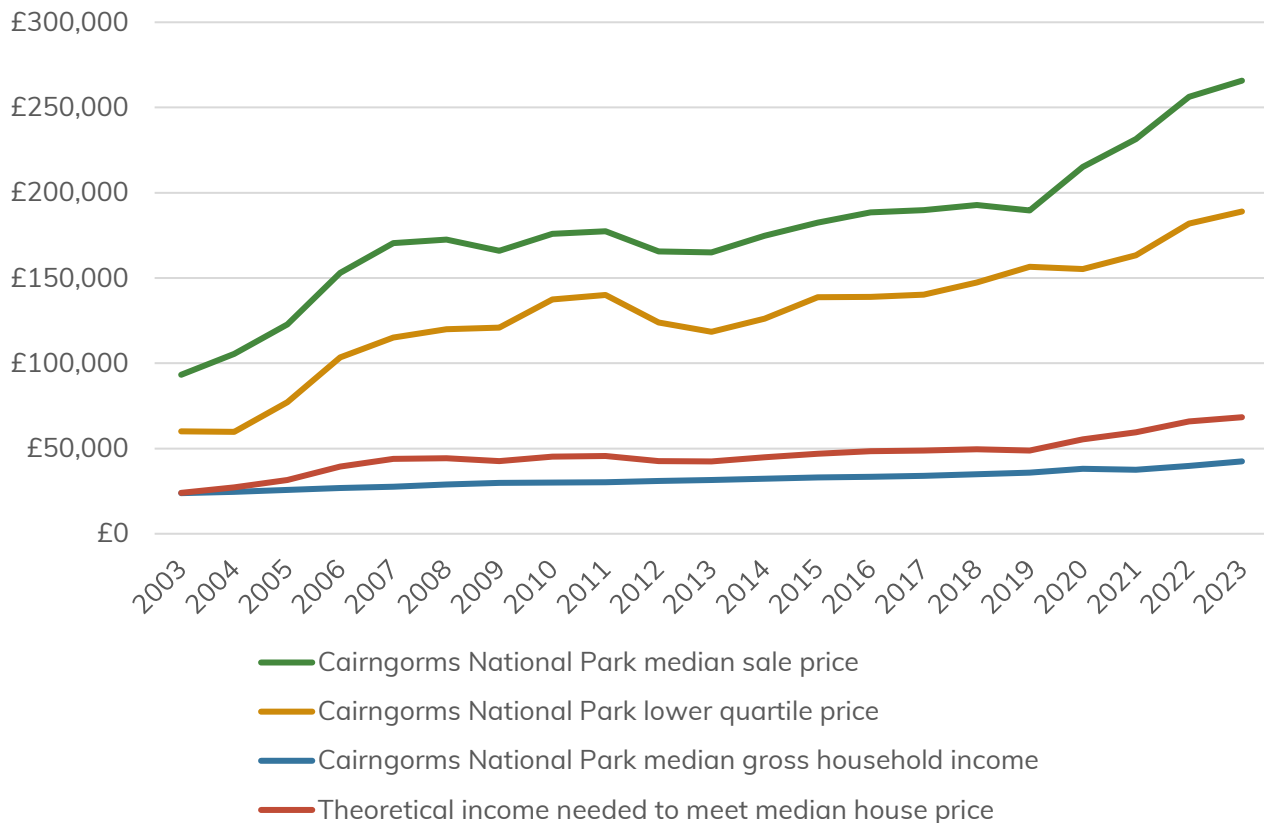


Figure 17 Median house price to median income in the Cairngorms National Park from 2003 to 2022 (statistics.gov.scot / Nomis).

The median house price to household income ratio is a key indicator of affordability and it varies across the National Park. In 2023, the areas with the highest ratios were around parts of Ballater (10.2), Braemar (9.6), and Kincaig (9.2).

This illustrates one of the greatest housing challenges in the National Park – affordability. The significant disparity between median household incomes and the

¹¹ The median gross income is based on the estimated median incomes for the data zones within the National Park. While not specific to the National Park, they are the closest indication of what household incomes are. The Highland Council's Housing Needs and Demand Assessment does include median income estimates for Badenoch and Strathspey, which in 2018 was £34,320. This was an increase of 10% from 2014 (£31,200), which was the highest increase across the Highland region. Aberdeenshire Council's Housing Need and Demand Assessment also estimates the annual household income as £34,320 (with a lower quartile figure of £20,800 based on 2018 figures) for the part of Aberdeenshire within the National Park.



income needed to be able to afford a median priced house means that it is increasingly difficult for people employed within the National Park to purchase a home here.

Median house price to income ratio 2023

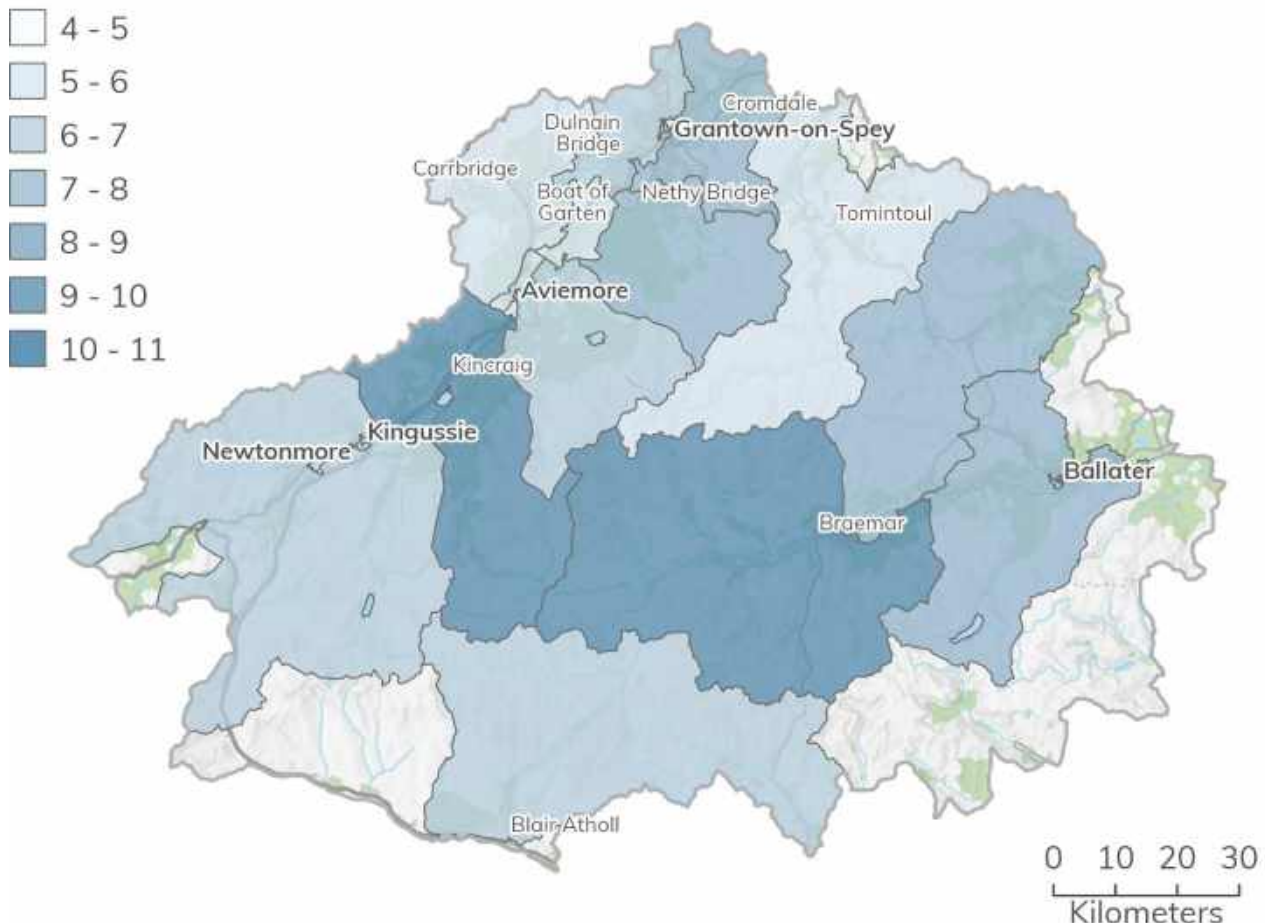


Figure 18 Median house price to median gross household income ratio by 2011 data zone in the Cairngorms National Park 2023. Reproduced by permission of Ordnance Survey on behalf of His Majesty's Stationery Office. © Crown copyright and database right 2025. All rights reserved. Ordnance Survey Licence number AC0000821810, Cairngorms National Park Authority. Contains data © statistics.gov.scot and Nomis 2025.

Housing stock

Number of houses

The number of dwellings in the National Park is estimated to have grown from 9,722 to 10,542 between 2008 and 2023 (an increase of around 10.5%). These numbers are derived from the 'household estimates' dataset which is based on Council Tax data collected for 2011 data zones (statistics.gov.scot). This dataset also contains information on the number of these dwellings which are occupied (which is considered



to indicate the number of households), which are used as second homes, or are vacant. This is explored in this section.

Type of houses

Figure 19 illustrates the proportions of different dwelling types for all tenures that make up the housing stock in the National Park compared to Scotland as a whole. This is derived from the 'dwellings by type' dataset, which is based on a different Council Tax data source – the valuation list. Data for 2018 onwards is not currently available.

It highlights that detached homes account for a far greater proportion of dwellings in the National Park (52%) than in Scotland as a whole (21%). This may partly indicate why property in the Cairngorms National Park is more expensive than Scotland as a whole. There are similar proportions of semi-detached homes in the National Park (23%) and Scotland as a whole, however 7% fewer terraced housing and 27% fewer flats in the National Park compared to Scotland (20% and 38% respectively).

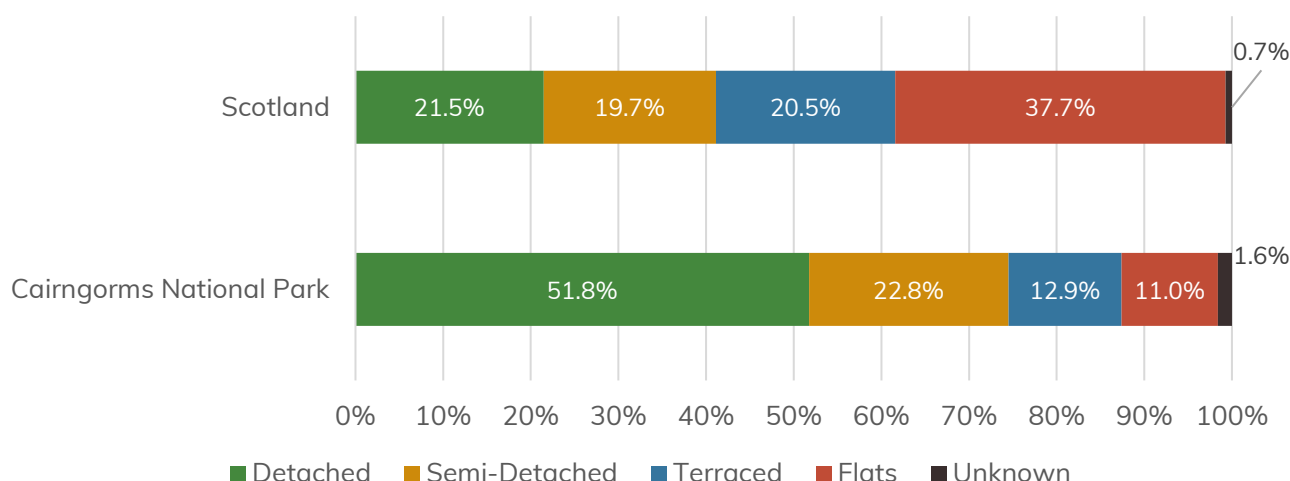


Figure 19 Proportion of house types within Scotland and the National Park (2017) (statistics.gov.scot).

While the next section on new builds explores this in more detail, Figure 20 shows the extent to which each of the different housing types have changed between 2006 and 2017.

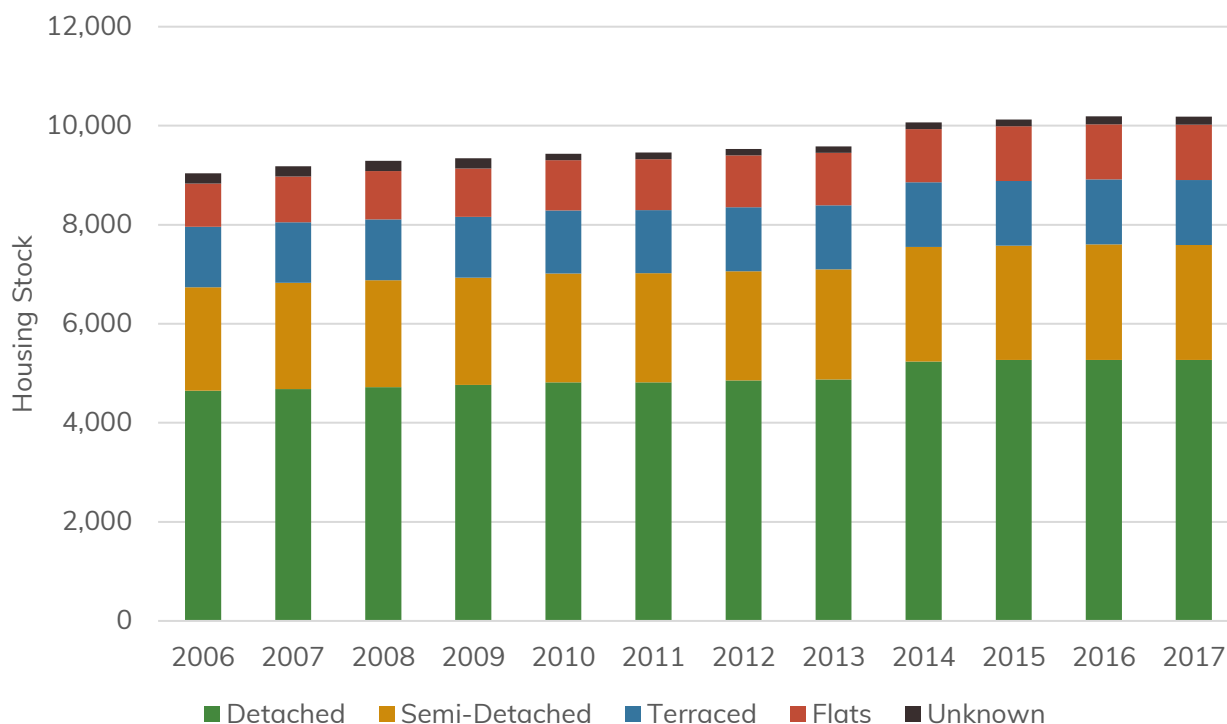


Figure 20 Total number of different house types in the Cairngorms National Park between 2006 and 2017 (statistics.gov.scot).

Based on this data, the number of detached homes increased from 4,650 to 5,272 (an increase of 13.4%). Semi-detached and terraced homes (accounting for 2,087 and 1,225 homes respectively in 2006) saw a slightly lower increase of 11% and 7% over the same period. While flats form the smallest proportion of house type, they saw the greatest increase from 867 in 2006 to 1,110 in 2017 – an increase of nearly 30%.

The 'unknown' housing types have decreased by 21% although in real terms this is a relatively small 'loss' of 45 homes across this National Park. This could be attributed to a number of reasons such as a change of use or a property being re-assigned into one of the other categories. However, due to the tiny contribution that this makes to the overall housing numbers, it is not considered significant.

While this data positively shows that there has been a considerable increase in the number of flats, it is evident that detached homes continue to increase and form the most significant housing type in the National Park.

The annual data derived from council tax can be supplemented and supported by Census data, which provides information on house type for occupied households in 2022 (Figure 21). Census data does not consider all properties, just those that house usual residents at the time the Census was undertaken, therefore the two datasets do



not exactly match. Nevertheless, it demonstrates that little has changed in this aspect of the National Park's housing stock since the 2017, which represents the latest available council tax data.

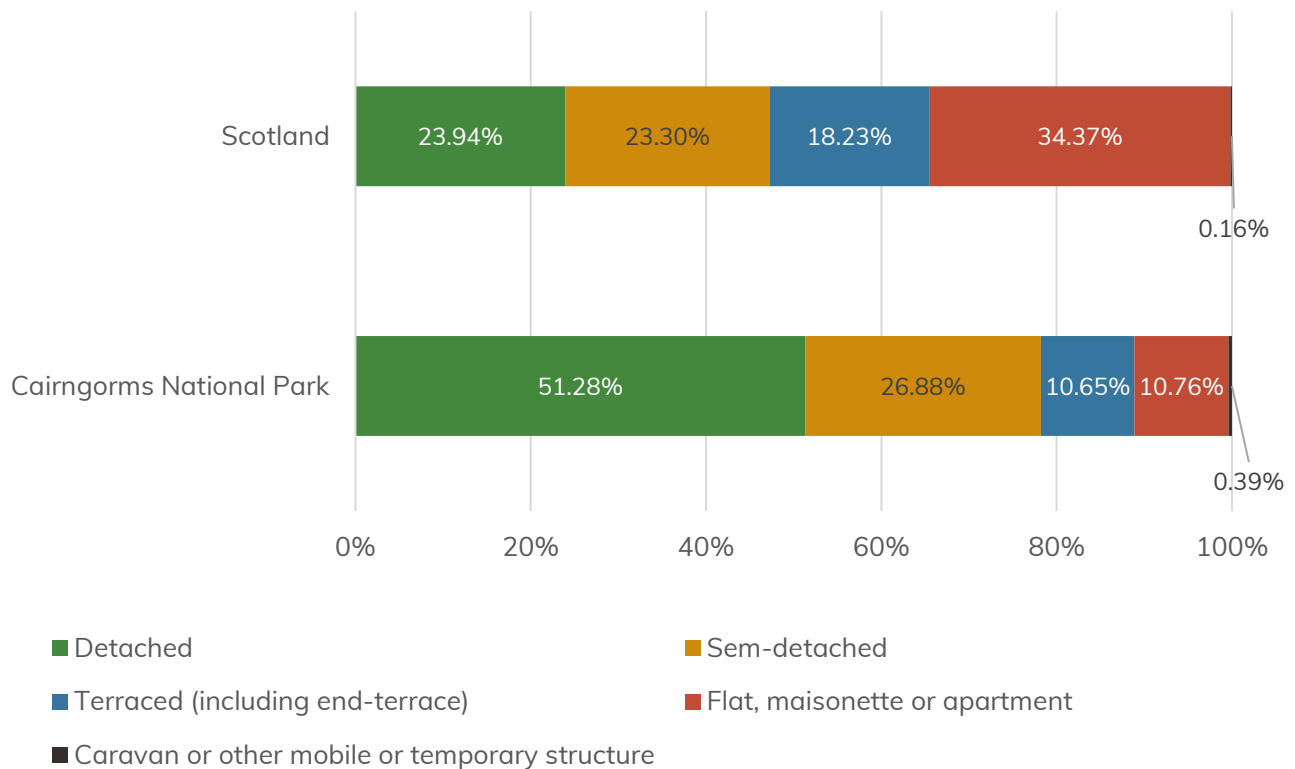


Figure 21 Proportion of house types by occupied households within Scotland and the National Park in 2022 (Census table UV402).

Council Tax data can also provide an indication of affordability since bands are based on the value of property. Properties are put into one of eight bands (A-H), based on their value in April 1991, with band A being the least lowest value homes, and band H the highest.

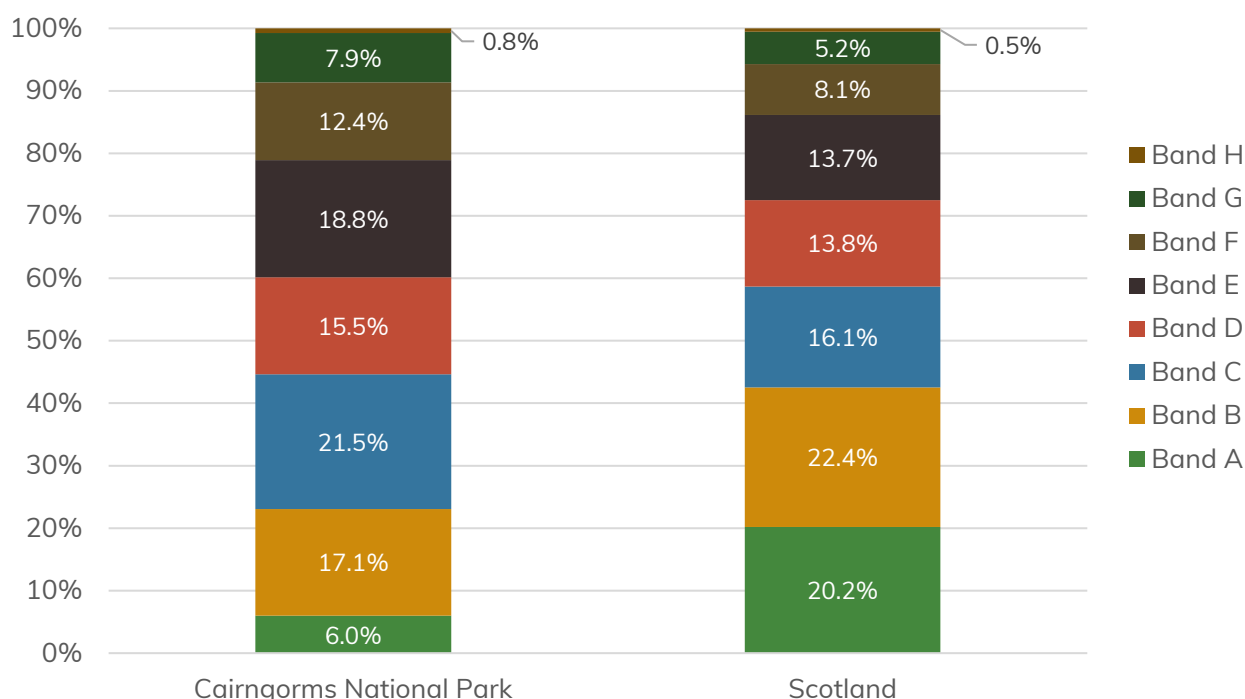


Figure 22 Proportion (%) of each council tax band in the National Park and Scotland as a whole (2023) (nrscotland.gov.uk).

Figure 22 illustrates that, based on 2023 data, there is a lower proportion of properties within bands A and B, significantly so in the case of band A (6% compared to 20.2% for Scotland as a whole). However, from band C upwards, the National Park has a greater proportion of each band in comparison to Scotland as a whole. In addition, it should be noted that there are spatial variations meaning that this trend is further skewed in certain parts of the National Park.

And finally, the number of rooms that a house has also provides useful data that indicates the types of homes in the National Park. This is the number of habitable rooms (usually bedrooms and living rooms) collated by the National Records of Scotland from the Assessors' Portal.

Figure 23 shows that the National Park has proportionately fewer homes with one to four rooms than Scotland as a whole and more properties with five rooms or more. However, while the figures between the National Park and Scotland do not appear on the graph to be significantly different, there are 30% fewer one-room homes, 19% fewer two-room and 37% fewer three-room homes. In addition, there are just 3% fewer four room homes and over double the proportion of homes with nine and ten rooms than that of Scotland as a whole.

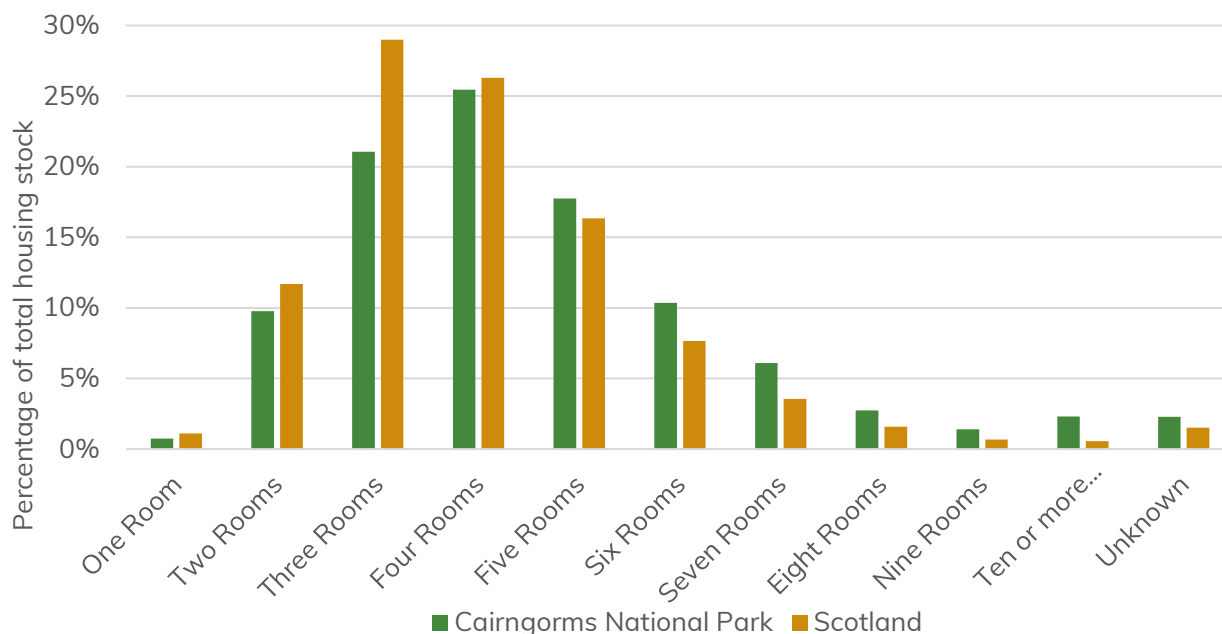


Figure 23 Percentage of housing stock with one to ten or more rooms per house in the National Park and Scotland as a whole (2017) (median number of rooms, statistics.gov.scot).

In addition to the National Records Scotland data, Scotland's Census 2022 provides information on the number of bedrooms of occupied households (Figure 24). This shows that the National Park has a smaller proportion of 1 – 2 bedroom properties and a higher proportion of 3 – 5 of more bedroom properties than Scotland as a whole.

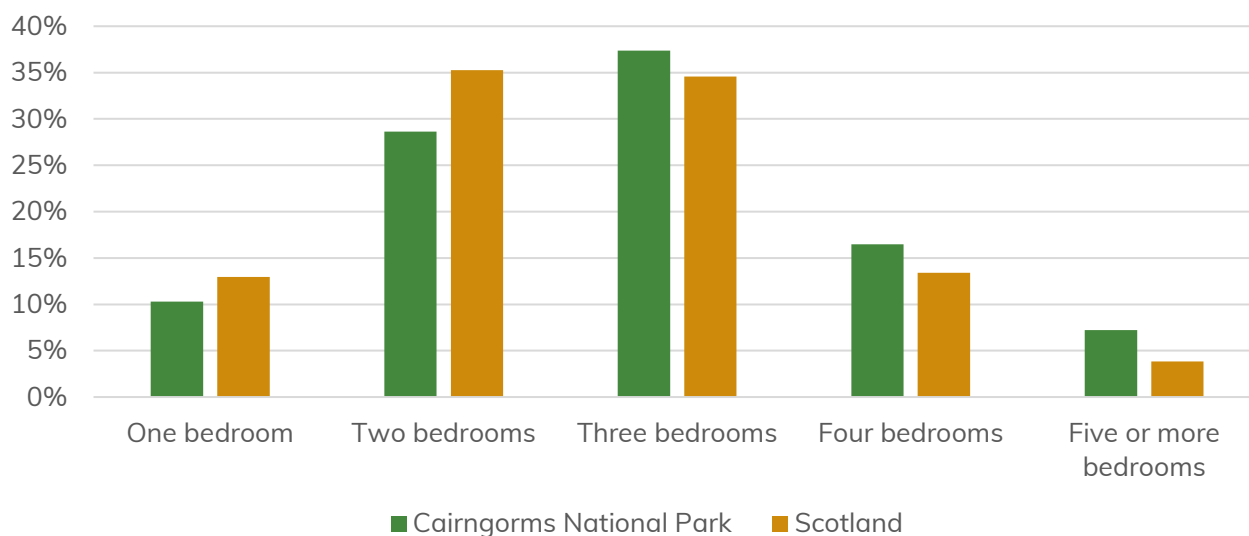


Figure 24 Percentage of households with one to five or more bedrooms per house in the National Park and Scotland as a whole in 2022 (Census Table UV408).



Numbers of rooms (Figure 23 and Figure 24), council tax bands (Figure 22) and house type data (Figure 20 and Figure 21) all illustrate that the National Park has a greater number of larger and ultimately more expensive homes compared to Scotland as a whole. This therefore not only means that housing in the National Park is more expensive, but also that there are fewer smaller homes available. It is also likely to be one of the driving factors for the high rate of house price growth since 2020 as, according to research by the Lloyds Banking Group¹², nationally the average price for bigger homes grew at nearly twice the rate than smaller properties over the pandemic period.

The adopted Cairngorms National Park Local Development Plan 2021 already seeks to address the imbalance, with Policy 1.4: Designing for affordability and specialist needs. It requires residential developments to provide a mix of dwelling types and sizes to help secure a balanced housing stock, with an emphasis on smaller dwellings. The Park Authority will need to consider whether a similar approach needs to be taken forward in the proposed plan.

Housing tenure

Figure 25 illustrates the different housing tenures that made up the housing stock in the National Park according to the 2022 census. Table 11 sets out the proportions of each tenure type, in each of the constituent authorities. Owner occupation is the dominant tenure, and this is relatively consistent with Scotland as a whole (where owner occupation made up 62% in 2011 and 63% in 2022).

¹² See <https://www.lloydsbankinggroup.com/media/press-releases/2023/halifax-2023/three-years-on-how-the-pandemic-reshaped-the-uk-housing-market.html>

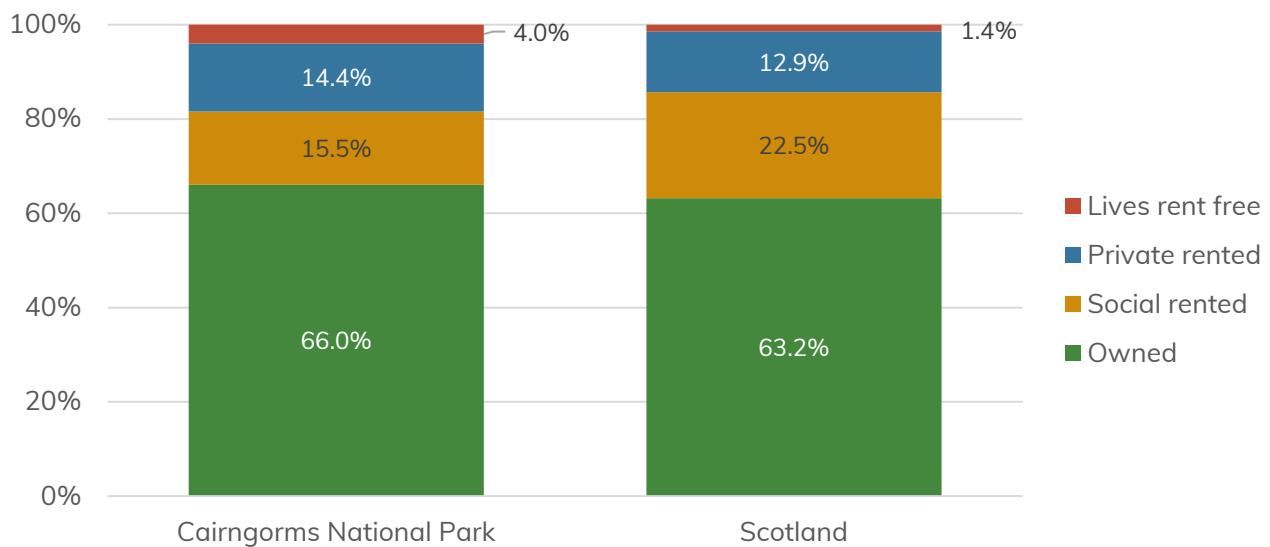


Figure 25 Household tenure of all occupied stock in the National Park and Scotland in 2022 (Census Table UV404).

The owned category may be broken down into ownership type (Figure 26). This demonstrates that the National Park has a higher rate of outright ownership than the Scottish average. Shared equity and shared ownership are affordable housing models. In 2022 there were 27 households (0.52%) occupying shared ownership homes and 67 (1.2%) occupying shared equity homes. While these numbers are low, they exceed the national average, which are 0.4% and 0.95% respectively.

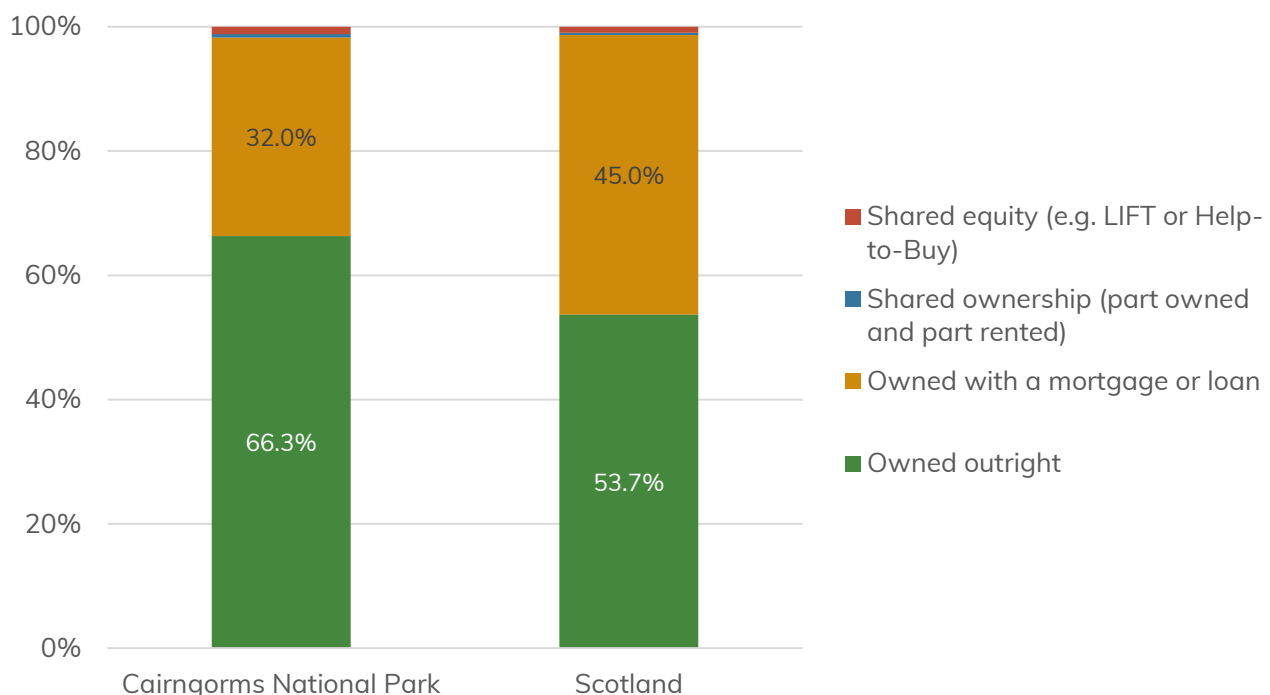


Figure 26 Household tenure of owner-occupied stock in the National Park and Scotland in 2022 (Census Table UV404).



Social rent is the next biggest tenure and accounts for around 16% of households (similar in 2001 and 2011). It remains high despite 1,069 council houses within the National Park being sold through Right to Buy schemes between 1980 and 2005 (www.statistics.gov.uk). While the Right to Buy scheme has now been abolished in Scotland, social housing stock levels in the National Park remain lower (15.5%) in comparison to Scotland as whole (22.5%).

Living rent free is considerably higher, as a category, in the National Park (4%) in comparison to Scotland as a whole (1.4%). This is likely a reflection of having a high proportion of households renting from an employer representing estate workers and seasonal workers in the tourism sector, where accommodation is often included with the job.

Private rented housing also forms a considerable proportion of housing tenure in the National Park at 14.4%. This percentage is similar to the proportional size of the private rented sector across Scotland at 12.9%. According to statistics published by the Scottish Government in November 2023 – ‘Private Sector Rent Statistics, Scotland 2010 to 2023’ the private rented sector across Scotland grew from 5% of all households in 1999 to 15% in 2016, before settling at its 2022 level.

Despite this, since 2010, the average rent of a two-bedroom property in Scotland has risen by an estimated 52%, above the cumulative increase of the UK Consumer Price Index of 46%¹³. However, growth has been highest in the central belt, with the broad market areas of Greater Glasgow, Lothian, East Dunbartonshire, Forth Valley, Fife and Dundee and Angus being the only areas with two-bedroom property rents rising at more than the UK Consumer Price Index.

The availability of private rented stock in the Cairngorms National Park is scarce. A search on 31 July 2024, produced no rental properties on ‘Right Move’, a three-bedroom semi-detached house (£895) in Grantown-on-Spey (listed on 30 July 2024) and detached three-bedroom bungalow (£700) close to Strathdon on ‘Zoopla’ (listed on 28 July 2024). and two on Highland Property Services’ website (a two-bedroom bungalow two miles from Boat-of-Garten for £950/month and a three-bedroom terraced house in Grantown-on-Spey for £925).

¹³ Cumulative increase from the year to end September 2010 to the year to end September 2023.



Table 11 Housing tenure of all stock in the Cairngorms National Park, in each constituent local authority area, and in Scotland as a whole (Census 2022, Table UV404)

Geographic area	Owned	Social rented	Private rented	Living rent free
Cairngorms National Park	60.0%	15.6%	14.4%	4.0%
Aberdeenshire	73.9%	15.4%	9.1%	1.6%
Angus	67.1%	19.3%	11.8%	1.8%
Highland	67.8%	19.5%	10.7%	2.1%
Moray	67.0%	19.2%	11.9%	1.9%
Perth & Kinross	67.8%	16.4%	13.7%	2.1%
Scotland	63.2%	22.5%	12.9%	1.4%

It is not possible to obtain an accurate picture of the amount and type of social housing stock in the National Park as well as the demand for it, due to housing market areas within many of the local authorities not aligning with the National Park. However, this information is available for Badenoch and Strathspey (as set out in the Highland Council's Housing Need and Demand Assessment 2020) which closely aligns with the boundaries of the National Park in the Highland Council area.

Table 12, below, shows there are a total of 895 social rented properties within Badenoch and Strathspey and the biggest proportion of these are houses (comprising bungalows and houses) which form over 66% of the total social rented housing stock.

Table 12 Social rented stock by type in Badenoch and Strathspey (The Highland Council, Housing Need and Demand Assessment, 2022).

	Bedsit	Bungalow	Ground floor flat	House	Sheltered	Upper flat	Total
Number	2	220	153	377	16	127	895
Proportion	0.2%	24.6%	17.1%	42.1%	1.8%	14.2%	100%

Table 13, below, shows house sizes across the social rented sector in Badenoch and Strathspey. It is notable that over 50% of properties are 2-bed. However, when comparing this to demand (Table 14), only 17% is for 2-bed properties. 63% are seeking a 1-bed property (only 27% of the stock). This highlights the imbalances and difficulties in meeting housing need, as well as the demand for 1-bed properties. It also supports the need for the proposed plan to contain mechanisms to deliver a higher proportion of smaller homes.



Table 13 Social rented stock by size in Badenoch and Strathspey (The Highland Council, Housing Needs and Demand Assessment, 2022).

	1 bed	2 bed	3 bed	4+ bed	Total
Number	242	456	173	24	895
Proportion	27%	51%	19%	3%	100%

Table 14 Housing demand by property size in Badenoch and Strathspey (Source: The Highland Council, Housing Needs and Demand Assessment, 2022).

	1 bed	2 bed	3 bed	4+ bed	Total
Number	439	116	101	41	697
Proportion	63%	17%	14%	6%	100%

See page 85 for a detailed analysis of housing need and demand, including affordable housing.

Second homes, empty homes and short-term lets

Like many rural areas, ineffective stock, which includes second homes and vacant homes, is likely to be compounding the issues of affordability in the National Park, particularly following the Covid-19 pandemic. Evidence published by the Royal Town Planning Institute in 2022 highlights that rural areas experienced high annual price growth between 2020 and 2021 in both 'near-countryside' areas influenced by larger centres and 'less-accessible countryside', such as National Parks.

It suggests that in these important rural amenity areas, the changes in the market are rooted in three lifestyle changes. Firstly, increased demand for second homes; secondly the conversion of existing second homes to first-use homes; and thirdly permanent lifestyle relocation. House prices also increased due to the demand for holiday lets responding to the growing staycation market and greater demand for family homes in rural amenity areas. Growth rates of around 20% were seen in English coastal areas, Welsh rural authorities and Argyll and Bute (encompassing many island communities).

The paper comments that rural authorities will need to rethink patterns of housing supply – whether they continue with plans to expand key service centres and restrict growth in smaller settlements or 'smear growth' more evenly across settlement hierarchies enabling more villages to expand.

The paper also notes that the impacts of the pandemic are still uncertain, and it is not known whether counter-urbanism will continue, increasing the pressure of rural areas,



or whether 'pandemic buyers' will return to urban or suburban lives. In either case, pressure on the stock of rural homes, especially in amenity and coastal areas is likely to remain strong, with a key challenge for local authorities being how to protect houses for local occupation and expand the stock of affordable homes.

Figure 27 shows that there is a very high proportion of second homes (10.5% of all dwellings) in the National Park, when compared to its constituent local authorities and to Scotland as a whole. The figure is also significantly higher than the figure for all Scottish remote rural areas (rural / urban classification), which is 6.5%¹⁴. Together with the fact that 6% of homes are vacant¹⁵, over 16% of all housing stock in the Cairngorms National Park is ineffective (based on 2023 data).

By contrast, the proportion of ineffective dwellings in the National Park's constituent local authorities is considerably lower and in Scotland as a whole, where second homes account for just 0.9%, with a further 3.3% being vacant (totalling 4.2%).

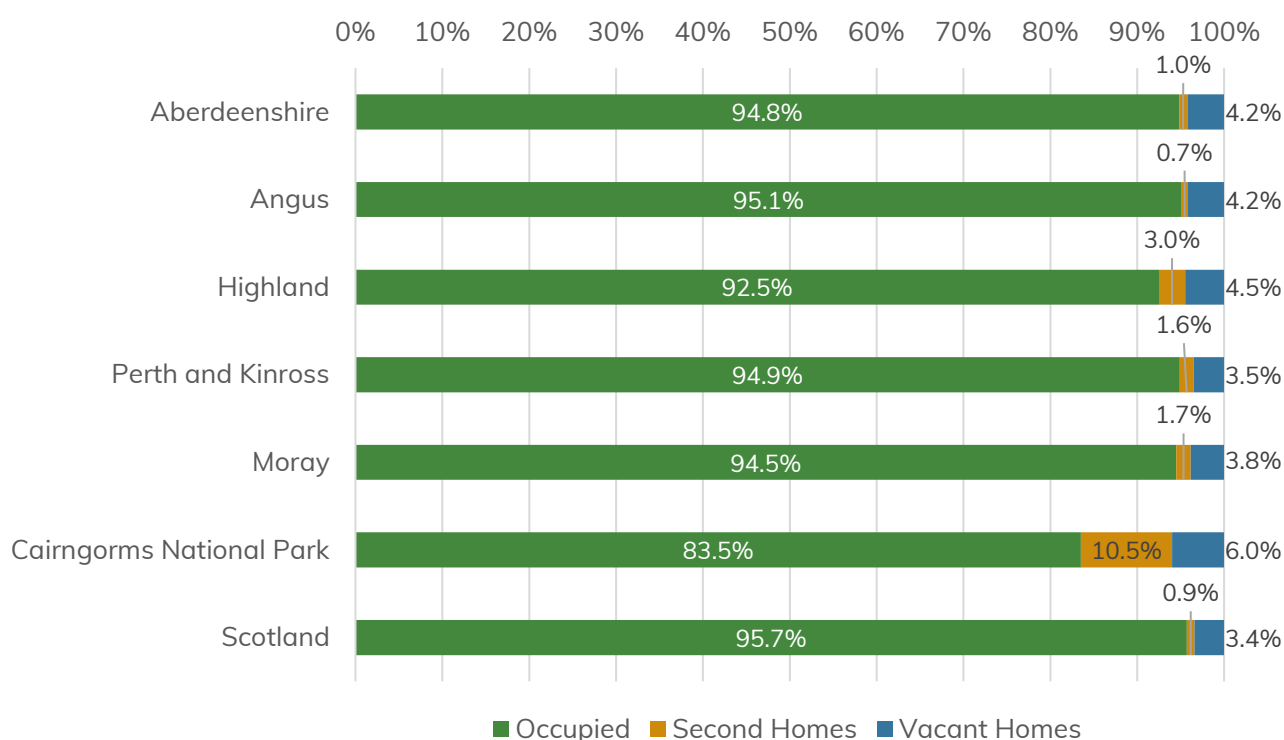


Figure 27 Percentages of effective and ineffective housing stock in the National Park, in Scotland, and in each constituent local authority area, based on 2023 data (statistics.gov.scot).

¹⁴ Rural and Islands Housing: Action Plan (2023)

¹⁵ This includes dwellings exempt from paying council tax because they are unoccupied and dwellings which are recorded on council tax systems as being long-term empty properties.



The historical data is informative. While between 2008 and 2023 the number of dwellings in the National Park grew from 9,722 to 10,542, an increase of around 10.5%, the number of occupied dwellings only grew by 8.5%, from 8,114 to 8,805. This is due to an increase in vacant dwellings, rather than second homes. As set out in Table 15 and Figure 28, between 2008 and 2023, the number of vacant dwellings increased from 359 to 632, while the number of second homes fell, from 1,245 to 1,105.

Table 15 Household estimates of the total dwelling stock and the number of occupied homes and ineffective stock (second and vacant) homes) in the Cairngorms National Park 2008-2023 (statistics.gov.uk).

Category	2008	2009	2010	2011	2012	2013	2014	2015
Total dwellings	9,722	9,789	9,888	9,932	9,985	10,055	10,094	10,188
Occupied	8,114	8,142	8,207	8,242	8,283	8,362	8,510	8,486
Second homes	1,245	1,270	1,266	1,263	1,267	1,241	1,192	1,210
Vacant	359	377	409	423	435	451	393	491
Ineffective stock	1,604	1,647	1,675	1,686	1,702	1,692	1,585	1,701

Category	2016	2017	2018	2019	2020	2021	2022	2023
Total dwellings	10,117	10,196	10,255	10,247	10,673	10,283	10,358	10,542
Occupied	8,455	8,567	8,654	8,621	8,642	8,643	8,683	8,805
Second homes	1,187	1,205	1,176	1,158	1,138	1,118	1,100	1,105
Vacant	474	422	421	469	493	522	575	632
Ineffective stock	1,661	1,627	1,597	1,627	1,631	1,640	1,675	1,737

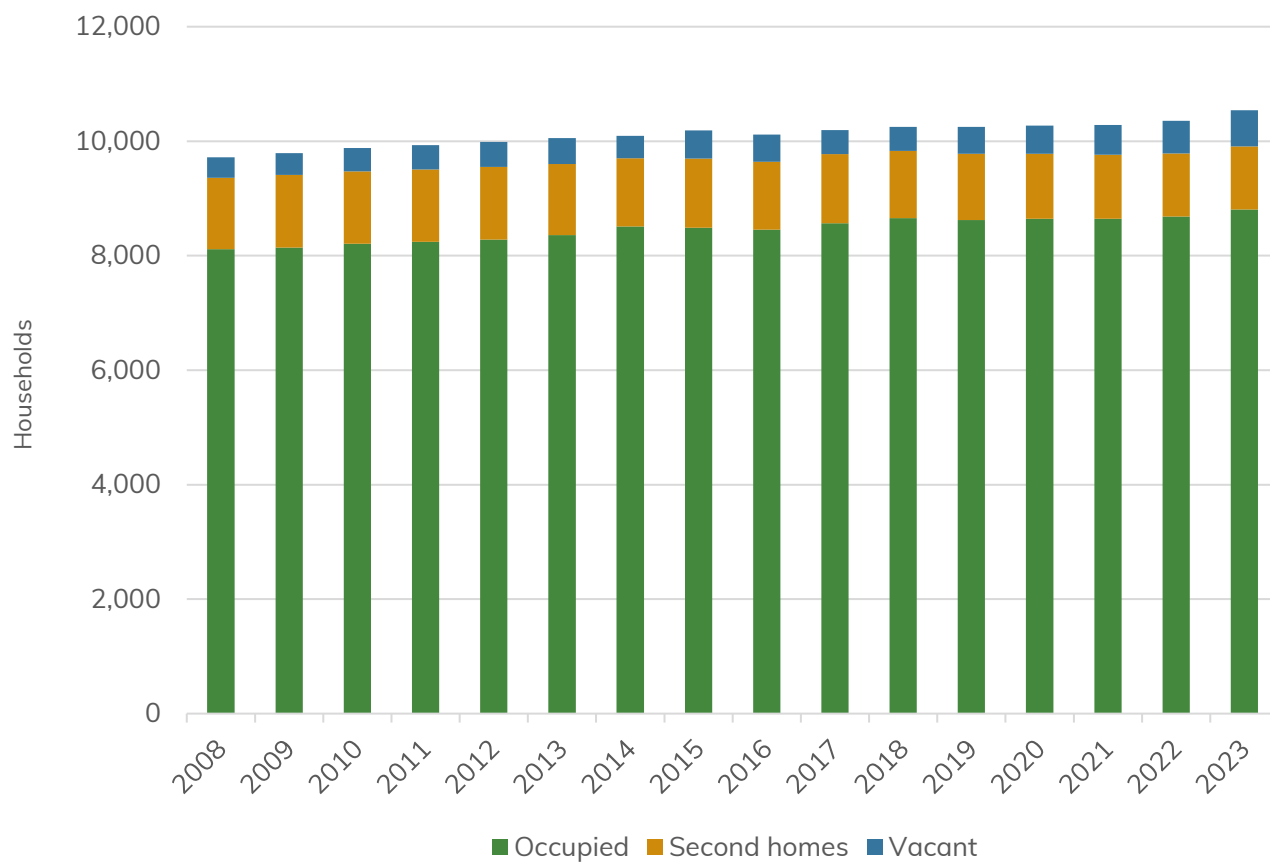


Figure 28 Household estimates of total dwelling stock in the Cairngorms National Park coloured to show the proportion of effective (occupied) and ineffective (second homes and vacant dwellings) housing stock for each year from 2008 to 2023 (statistics.gov.uk).



Second homes 2023

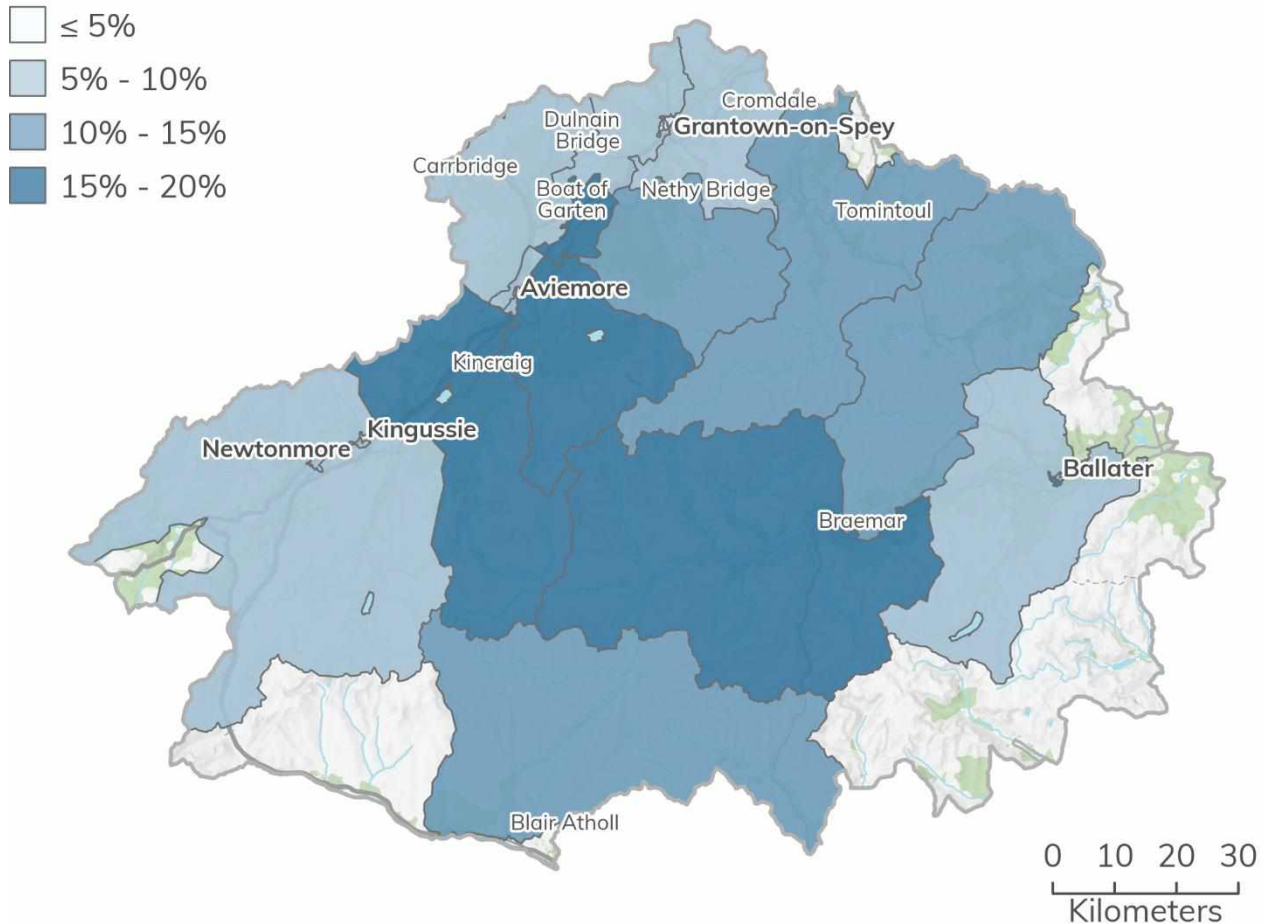


Figure 29 Proportion of second homes by 2011 datazone in the Cairngorms National Park in 2023. Reproduced by permission of Ordnance Survey on behalf of His Majesty's Stationery Office. © Crown copyright and database right 2025. All rights reserved. Ordnance Survey Licence number AC0000821810, Cairngorms National Park Authority. Contains data © National Records Scotland, 2025.

The distribution of second homes varies considerably throughout the National Park, with the highest levels occurring around parts of Aviemore and Glenmore (18%), parts of Ballater (17%), Boat of Garten (16%), Braemar (19%) and Kineraig (19%) (Figure 29). These areas also correspond with the areas with the highest levels of ineffective stock (Figure 30).



Ineffective stock 2023

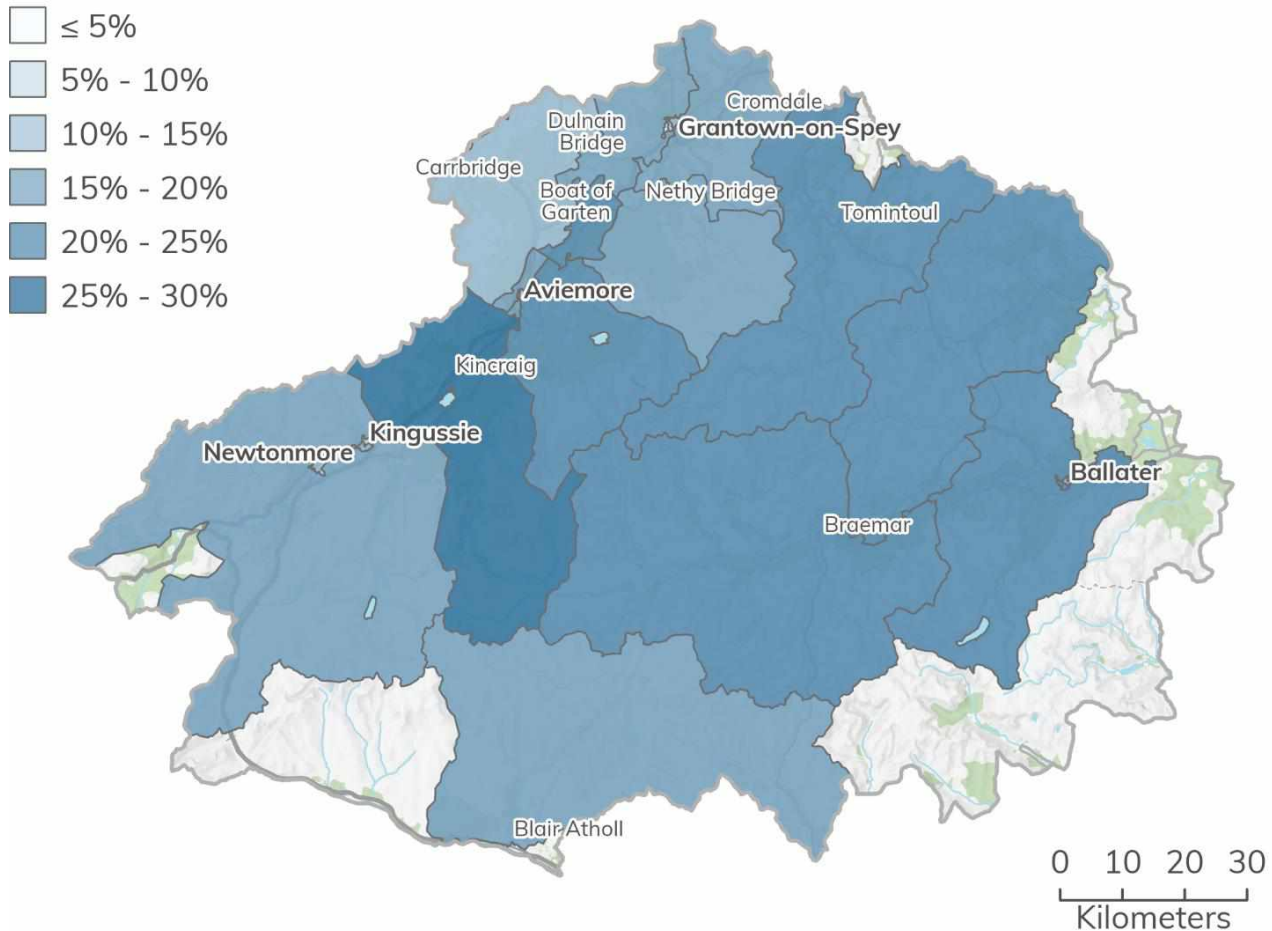


Figure 30 Proportion of ineffective stock by 2011 datazone in the Cairngorms National Park in 2023. Reproduced by permission of Ordnance Survey on behalf of His Majesty's Stationery Office. © Crown copyright and database right 2025. All rights reserved. Ordnance Survey Licence number AC0000821810, Cairngorms National Park Authority. Contains data © National Records Scotland, 2025.

The proposed plan will not be able to directly control the use of market residential properties as second homes, as planning permission is not required for changes to their use as primary or secondary residences. However, the use of affordable homes may be controlled based on the occupancy criteria and / or legal agreements attached to them. Therefore, with the Partnership Plan's ambition to deliver a 75% affordable housing target, the number of new homes capable of being used as second homes will be limited. See page 85 for further information on housing need and demand, including affordable housing.



Short-term letting

In addition to second homes, properties are also used as short-term holiday lets. Since October 2022, all hosts of short-term let properties must hold a short-term let licence and be registered. Each local authority must publish a public register. There are four types of licence. Home sharing and home letting concern the use of the host or operator's only or principal home whereas secondary letting makes use of a separate premises.

The public registers indicate that there are 1,075 registered short-term holiday let properties in the Cairngorms. 806 of these are in Highland, 204 in Aberdeenshire, 40 in Perth and Kinross, 22 in Moray and 3 in Angus. This data is shown graphically in Figure 31.

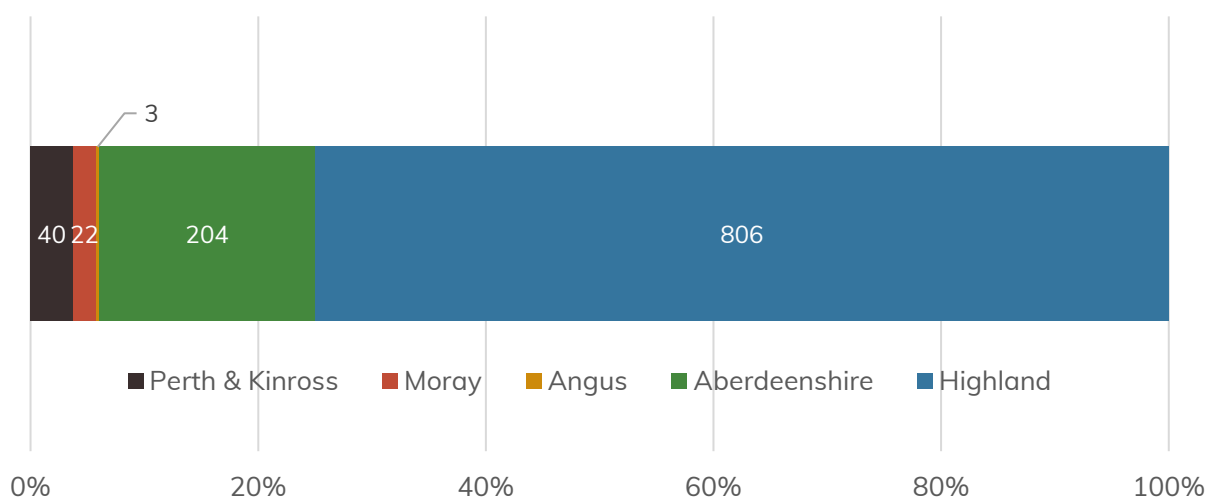


Figure 31 Number of publicly registered short-term holiday lets in the Cairngorms National Park, by local authority (licensing authority public registers, July 2024).

87% of short-term holiday lets in the Cairngorms National Park are registered as secondary lettings. This means that they are not primary residencies and are not part of the housing stock. In total, there are 942 properties registered as secondary lettings. Figure 32 shows that the proportions are similar for each constituent authority.

This data indicates that the number of short-term lets in the Cairngorms National Park, which are not also primary dwellings, is roughly equivalent to 9%¹⁶ of the total housing stock. Note that these properties are not part of the housing stock. However, this

¹⁶ It is not clear from the public register data whether the short-term let properties are purpose-built for this use or are former dwellings, however only 97 (around 10%) are recorded as being 'unconventional dwellings', which are less likely to be suitable for residential use.



indicates that in addition to 10.5% of the housing stock being second homes, there are roughly an equivalent number of properties outwith the housing stock used for holiday purposes.

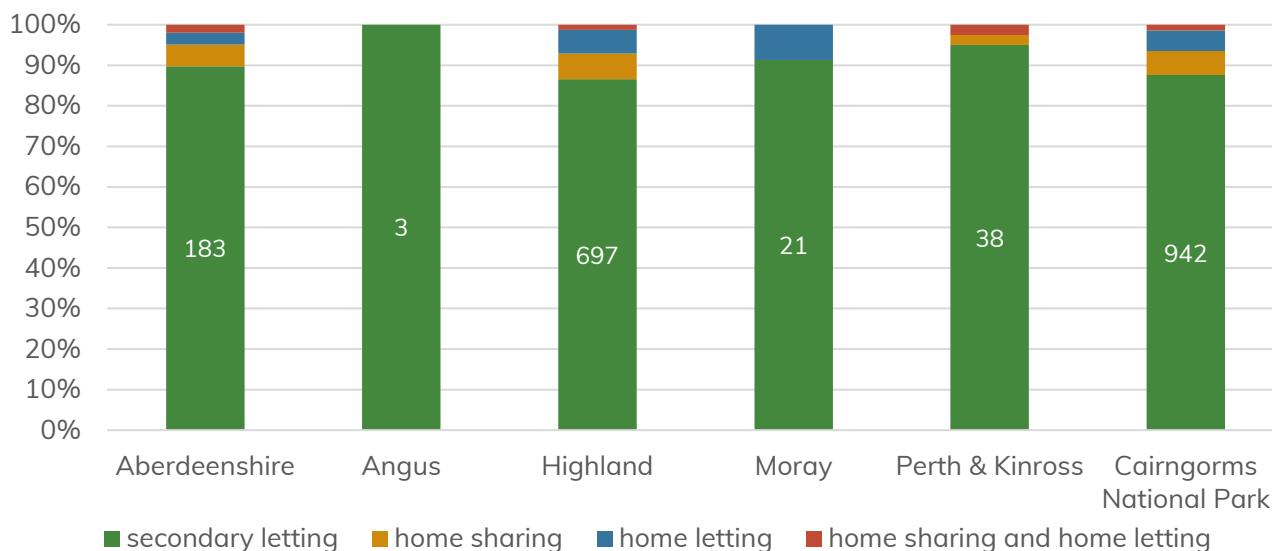


Figure 32 Proportion of secondary and principal home short-term holiday lettings for the Cairngorms National Park and for each licensing authority (licensing authority public registers, July 2024).

62% of registered short-term holiday lets are detached dwellings and a further 17% semi-detached. Figure 33 shows that these proportions are similar for each constituent authority.

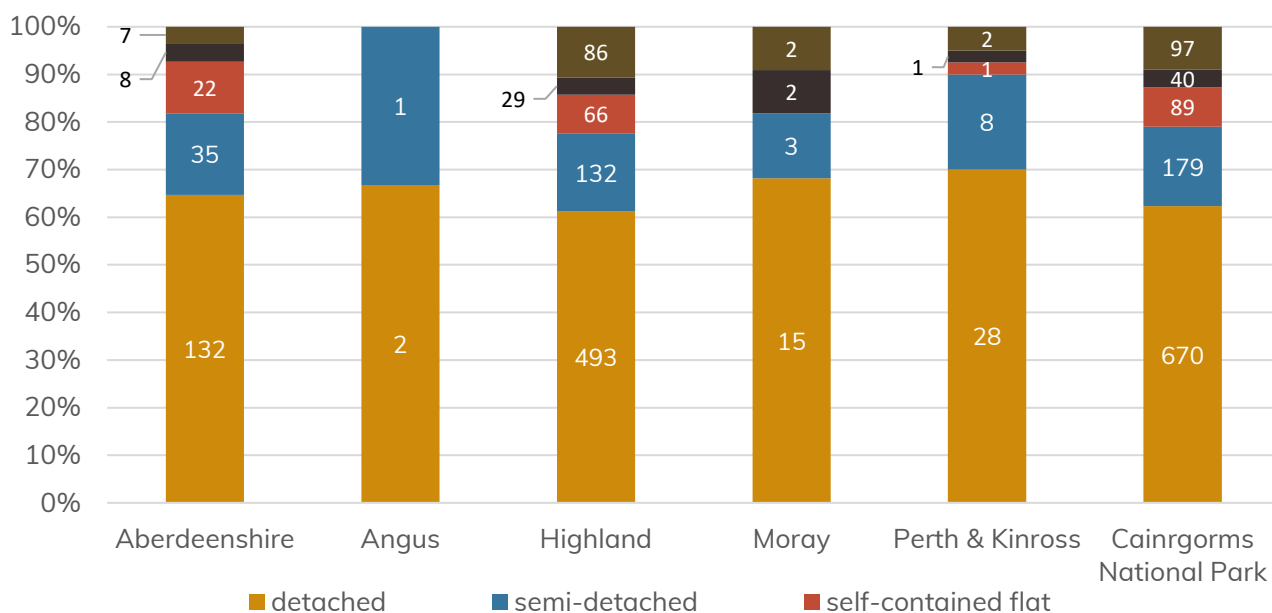


Figure 33 Number and proportion of short-term holiday lets in each dwelling type for each licensing authority (licensing authority public registers, July 2024).



Further information on the distribution of short-term lets is available from the Scottish Assessors Association (Figure 34). This data is derived from business rate valuations rather than the local authority licencing registers. The two data sets therefore do not match perfectly, however the map provides a good indication of where short-term lets are concentrated within the National Park.

Properties paying non-domestic rates

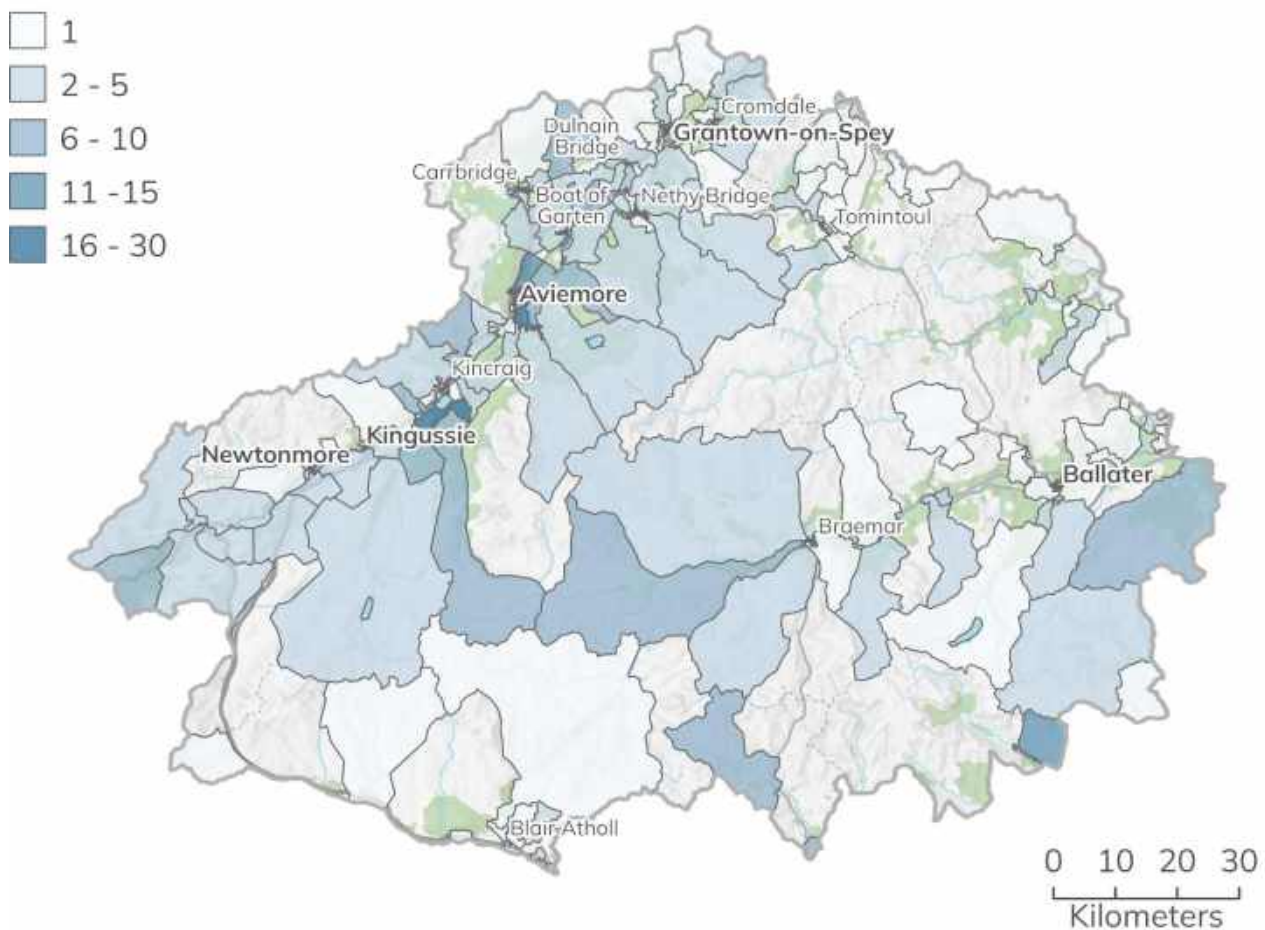


Figure 34 Proportion of properties paying non-domestic rates in the Cairngorms National Park by postcode area in 2023. Reproduced by permission of Ordnance Survey on behalf of His Majesty's Stationery Office. © Crown copyright and database right 2025. All rights reserved. Ordnance Survey Licence number AC0000821810, Cairngorms National Park Authority. Contains data © Scottish Assessors Association, 2025.

The Cairngorms Business Barometer – Quarter 1 2024, provides some insight into short-term lets from the business community with a lack of housing for the local population due to a high number of holiday homes noted.

In addition to requiring short-term lets to be licenced, the legislation (Section 26B of the Town & Control Planning (Scotland) Act 1997 as amended) also enables local



authorities to designate a 'Short Term Let Control Area' across all or part of its region to alleviate pressures in some areas and ensure homes can be utilised to meet local housing needs.

On 4 March 2024, the Highland Council designated a short-term let control area for the Badenoch and Strathspey area (Ward 20), the majority of which lies within the National Park. Highland Council's was that the number of short-term let properties in Badenoch and Strathspey 'is unduly restricting house supply for full time residents and increasing local house prices, all to the detriment of our local communities' (The Highland Council, Badenoch and Strathspey Short-term Let Control Area – Statement of Reasons).

This means that planning permission is required to change the use of a dwelling to a short-term let in Badenoch and Strathspey. Planning applications for short-term lets are assessed against relevant planning policies to determine whether they are acceptable.

Highland Council has introduced a 'non-statutory short-term lets within a control area planning policy'. It supports the use of an existing dwellinghouse as a short-term let where it falls into one of the following categories:

1. It is a long-term empty dwellinghouse that will be brought back into active use. Supporting evidence will be required to be submitted to demonstrate this.
2. The dwellinghouse is located above a commercial unit within a City, Town or Village centre.
3. The dwellinghouse has no fewer than four bedrooms, as it existed at the date of the establishment of the Control Area or, if constructed after the designation of the Control Area, as originally built.

The proposed plan will need to recognise the designation of the Ward 20 short-term let control area. This may include the inclusion of a policy similar to the non-statutory policy currently implemented by the Highland Council. The Park Authority will need to engage with the local authority's covering the National Park on the scope of the policy.

In May 2025, Perth and Kinross Council voted to start the process of creating a short-term let control area in Highland Perthshire and North Eastern Perthshire. The process is expected to take at least twelve months. Perth and Kinross Council introduced non-statutory planning guidance in relation to the change of use of residential property to short-term let in November 2023. The guidance advises that, where planning permission is required, proposals for the reuse of existing buildings for short term holiday letting will not be supported where the proposal will result in (i) an unacceptable impact on local amenity or the character of a neighbourhood or area or (ii) the loss of residential accommodation where such loss is not outweighed by demonstrable local economic



benefits. Six considerations under which proposals will be tested against the guidance are listed.

New housing

Completions

Between 2000 and 2008 the average completion rate in the Cairngorms National Park was just under 130 dwellings per year. However, the number fell sharply during the 2007 – 2008 financial crisis which resulted in an average annual completion rate of around 70 new dwellings between 2007 and 2021. The COVID-19 pandemic caused a greater dip in 2021, however 2022 marked a noticeable upturn, with 131 housing completions, and this rate was maintained in 2023, with 130 housing completions.

Figure 35 illustrates completion levels within each local authority area of the National Park as well as the total figure for the National Park.

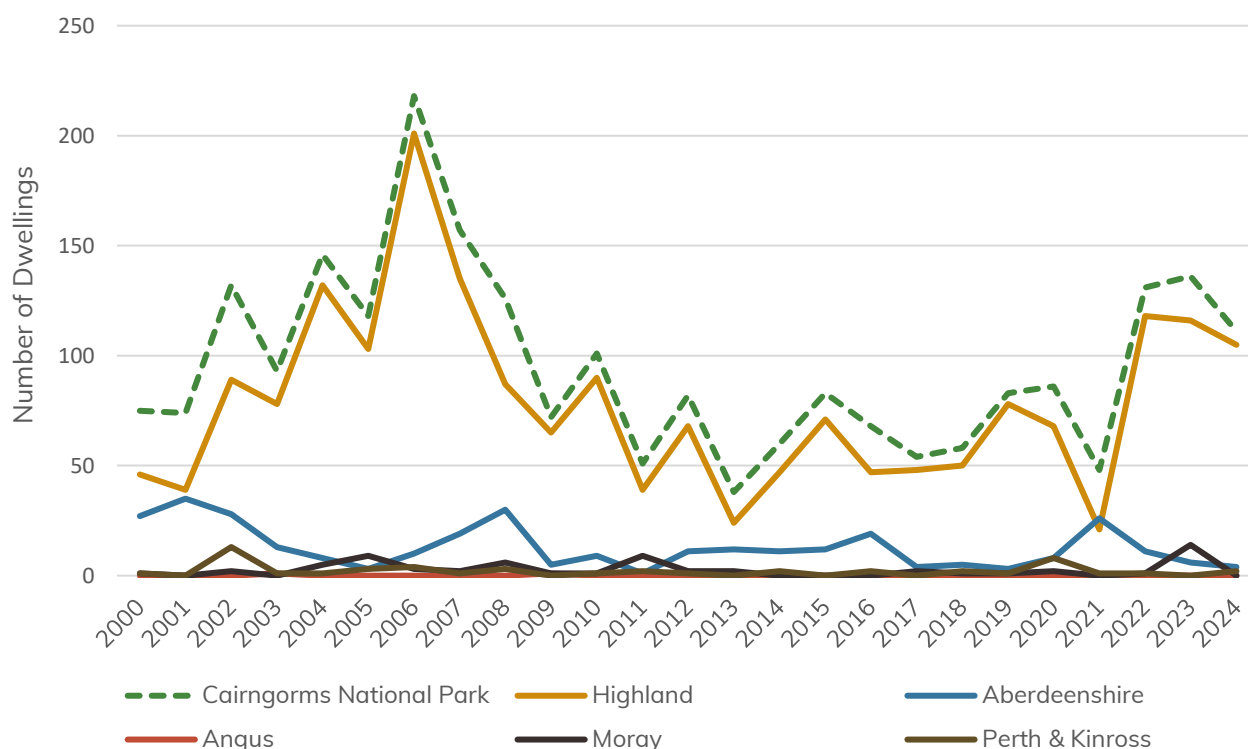


Figure 35 Housing completions in the Cairngorms National Park and for each constituent local authority area between 2000 and 2023 (local authorities).



Table 16 Housing Completions in Cairngorms National Park by constituent authority 2019 – 2023 (constituent authorities).

Year	Cairngorms National Park	Highland	Aberdeenshire	Angus	Moray	Perth and Kinross
2019	83	78	3	0	1	1
2020	86	68	8	0	2	8
2021	48	21	26	0	0	1
2022	131	117	11	0	1	1
2023	136	116	6	0	14	0
2024	111	105	4	0	n/a	2

The vast majority of new houses are built in Badenoch and Speyside, the part of the Cairngorms National Park within Highland Council. In the four years 2020 – 2023 (Table 17), 323 new houses were completed in Badenoch and Strathspey, 73 of which have been secured as affordable houses. This is 23% of the total number of houses built.

Table 17 Housing completions in Badenoch and Strathspey in 2020 – 2023 (Highland Council).

Tenure type	2020	2021	2022	2023	Total	% of total
Market	49	21	89	91	250	77%
Affordable	19	0	29	25	73	23%
Total	68	21	118	116	323	100%

Effective Housing Land Supply

The adopted Local Development Plan (2021) allocated a range of sites to meet its housing land requirement. This, together with windfall sites (non-allocated sites with planning permission) provides an established housing land supply which is monitored through the Local Development Plan Delivery Programme and each constituent local authority's Housing Land Audit.

The current effective housing land supply within the National Park, based on local housing audits is set out in Table 18.



Table 18 Estimated effective housing land supply based on local authority housing land audits (constituent local authorities)¹⁷.

Local authority	2024 - 2025	2025 - 2026	2026 - 2027	2027 - 2028	2028 - 2029	2029 - 2030	2030 - 2031	2031 - 2032	2032 - 2033	2033 - 2034		2034 - 2039
Highland Council	83	121	137	55	39	24	18	28	37	27		18
Aberdeenshire Council	1	48	34	30	24	13	0	0	0	0		0
Moray Council	0	0	4	4	0	4	4	0	0	0		0
Perth and Kinross Council	1	2	7	6	5	7	2	2	2	2		-
Total	85	171	182	95	68	48	24	30	39	29		18

¹⁷ Notes:

- Highland Council Housing Land Audit 2024 (March 2025) – yearly figures are for each financial year (April – March). Includes identified windfall sites.
- Aberdeen City and Aberdeenshire Council Housing Land Audit 2024 (March 2025) – yearly figures are for each financial year (April – March). There are no identified windfall sites in this part of the Cairngorms National Park.
- Moray Council Housing Land Audit 2024 / 25 (August 2024) - yearly figures are for each financial year (April – March). There are no identified windfall sites in this part of the Cairngorms National Park.
- Perth and Kinross Council Housing Land Audit 2023 (March 2023) – yearly figures are for each financial year (April – March). There are no identified windfall sites in this part of the Cairngorms National Park. Figure of 8 in audit for period 2030 – 2035 spread across years 2030 – 2031 to 2033 – 2034 above.



Housing need and demand

Housing need is an assessment of the number of households lacking their own housing, or who live in housing which is not suitable or adequate – and who are unlikely to be able to meet their needs in the housing market without some assistance. Housing demand is the quantity and type of housing which households wish to buy or rent and can afford.

Local housing authorities produce several key housing assessments, strategies and plans that to help them understand the housing characteristics and needs within their area and identify what actions are needed and should be prioritised. These comprise:

- Housing Need and Demand Assessments, which are designed to give broad, long-run estimates of what future housing need might be and provide an evidence-base to inform housing policy decisions in local housing strategies and land allocation decisions in local development plans.
- Housing Land Audits, which support housing delivery and monitor the progress of housing sites through the planning process.
- Local Housing Strategies, which set out a local authority's strategy, priorities and plans for the delivery of housing and related services within their area. It is informed by the evidence set out in the Housing Need and Demand Assessment.
- Strategic Housing Investment Plans, which set out how investment in affordable housing will be directed to achieve the priorities that have been identified in a Council's Local Housing Strategy.

Homes for Scotland's research paper 'Existing Housing Need in Scotland', published in January 2024, critiques the methodology used by the Housing Need and Demand Assessment tool to assess affordable housing need. The paper provides evidence that the need is much greater than the tool estimates. Nevertheless, it provides a consistent starting point.

As the Cairngorms National Park Authority is not a housing authority, it is not responsible for preparing the housing assessments, audits, strategies and plans that cover its area. Therefore, evidence of need and demand for the National Park must be drawn from the separate sets of housing assessments, audits, strategies and plans produced by its five constituent authorities – Aberdeenshire, Angus, Highland, Moray and Perth and Kinross. The reliance on evidence and data covering far wider geographic areas than the National Park's geography, makes identifying robust estimates for the type and tenure of housing required for the Cairngorms National Park complicated.



Housing market areas

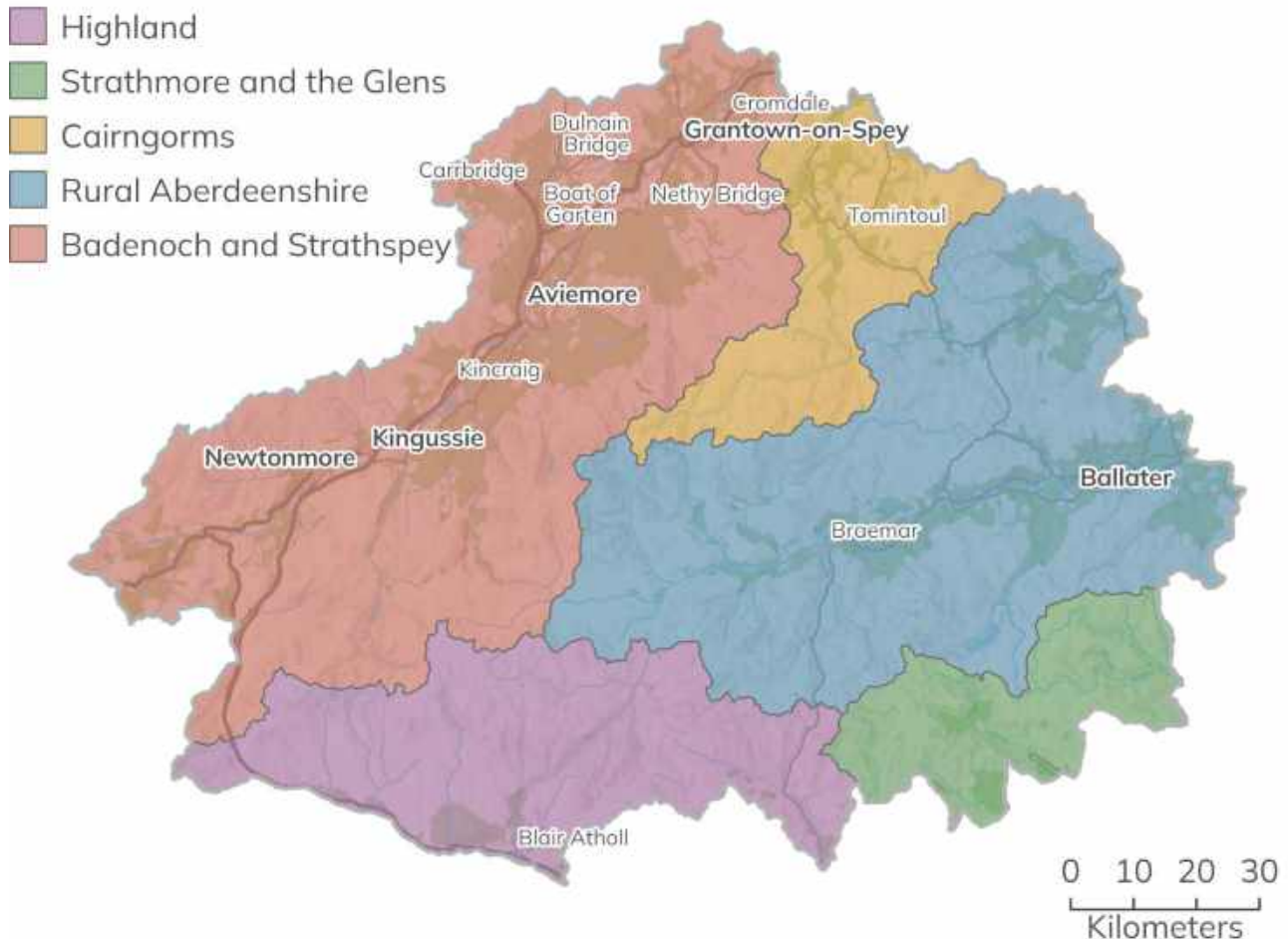


Figure 36 Housing market areas covering the Cairngorms National Park. Reproduced by permission of Ordnance Survey on behalf of His Majesty's Stationery Office. © Crown copyright and database right 2025. All rights reserved. Ordnance Survey Licence number AC0000821810, Cairngorms National Park Authority. Contains data © Aberdeen City Council, Aberdeenshire Council, Angus Council, Highland Council, Moray Council and Perth and Kinross Council, 2025.

Naturally, this means that assessments and strategies are produced over, and cover, different time periods and do not always contain compatible or consistent data. In addition, the five housing market areas¹⁸ that cover the Cairngorms National Park, relate to geographical regions of contrasting character and size (Figure 36) and relate to areas where the part within the Cairngorms National Park is often small and has different characteristics to the housing market area as a whole. Reconciling these studies is therefore often a difficult task in which gaps in information inevitably occur.

¹⁸ Housing market areas are functional areas that represent the spatial area where the majority of people moving house (without changing employment) search and purchase housing.



This paper sets out the evidence for need and demand according to the assessments and strategies of each local authority and their housing market areas:

- The Highland Council (see page 87)
- Aberdeenshire Council (see page 105)
- Moray Council (see page 116)
- Perth and Kinross Council (see page 123)
- Angus Council (see page 130).

In addition to the local authority data, evidence of need can also be drawn from the Cairngorms National Park resident and worker survey 2024 – 2025. While this data cannot be used to quantify need in terms of the housing land requirement, it does highlight the experiences, including barriers to finding affordable housing, of those living and working in the National Park. The survey findings, relevant to housing, are summarised on page 130.

The Highland Council

Highland Council Housing Need and Demand Assessment 2020

The greatest geographical area of the National Park falls within the Highland Council's local authority area. This area is also home to approximately 75% of the National Park's population and is the area that has experienced the greatest population growth.

The Highland Housing Needs and Demand Assessment 2020, third submission, was published in December 2021. The Centre for Housing Market Analysis advised that they considered the document to be 'robust and credible' in February 2022. The document provides estimates of future housing need and demand in Highland over the five years to 2024 and then in further five-year periods to 2039. It estimates the additional dwellings required to meet projected growth in the number of households as well as to meet existing affordable housing need. It provides evidence to inform Highland Council's housing strategy and local development plans, as well as the Cairngorms National Park local development plan.

The Highland Council has commissioned a new Housing Need and Demand Assessment, but its results will not be available until early 2026. The Cairngorms National Park Authority will take this into account in the preparation of its Proposed Plan.

The Highland Housing Needs and Demand Assessment 2020 identifies ten housing market areas, which are unchanged from those derived following the 2011 census. Badenoch and Strathspey is identified as a housing market area. Section 1.7 of the Housing Needs and Demand Assessment notes that small parts of the Badenoch and



Strathspey housing market area lie out with the Cairngorms National Park's boundary (an area around Advie, which contains 153 registered dwellings; two areas in the Monadhliath Mountains which have no dwellings; and an area around Laggan, which contains 20 registered dwellings).

The Housing Needs and Demand Assessment concludes that for most long-term planning purposes, the housing stock within the housing market area as a whole and the housing stock within the National Park can be considered to be equivalent.

Highland Council's Housing Needs and Demand Assessment (2020) highlights that the population projections produced by National Records Scotland are based on the continuation of trends over the last two decades and the Highland Market Partnership has raised concerns that planning on this basis might result in a shortage of housing land that would constrain future economic growth (The Highland Council, 2020).

The Housing Needs and Demand Assessment (paragraph 4.5.5) considers the 2018 household low migration, principal and high migration projections, concluding that the low migration and principal projections are unlikely to be correct, because of continuing expectations of net inward migration of over 1,000 people per year into the Highland Council area.

The Housing Needs and Demand Assessment acknowledges that different housing market areas have different demographic characteristics and growth across Highland is not consistent. However, the Badenoch and Strathspey housing market area has one of the highest expected population growths in Highland, behind Inverness and its immediate surroundings.

The Housing Needs and Demand Assessment also considers existing need (backlog of need), based on an assessment of the current living arrangements of each applicant on the Highland Housing Register. Each individual record has been examined to ascertain whether the application requires a stock addition (in which case they are included in existing need), or an in-situ solution, which does not need a stock addition. In total, the Housing Needs and Demand Assessment identifies, as at April 2020, that there is an existing need for 2,236 new housing units.

This figure is derived from the number of people identified who are currently either homeless, living in a hostel, living in a caravan, living in temporary accommodation, living or lodging with friends, or living with parents or relatives. Table 19 sets out these figures for both the Highland Council area and the Badenoch and Strathspey Housing



Market Area. In Badenoch and Strathspey, there is an identified existing need for 158 new housing units.

Table 19 Existing (backlog) need, by current housing situation, for Badenoch and Strathspey (Highland Council, Housing Needs and Demand Assessment 2020).

Reason for inclusion in backlog	Badenoch and Strathspey Housing Market Area	Highland Council
A – homeless	6	81
B – living in a hostel	6	61
C – living in a caravan	11	88
D – living in temporary accommodation	23	655
E – living or lodging with friends	33	233
F – living with parents of relatives	79	1,118
Totals	158	2,236

This existing need, which is for social rental affordable housing, is added to the first ten-years (2020 – 2029) of the low migration, principal and high migration projections to create three scenarios.

In addition, to identifying this ‘existing need’, the Housing Needs and Demand Assessment process recognised that despite the building of a significant number of affordable houses since 2015, the impact on the backlog of existing need has been minimal. This was considered by an ‘In Year Arising Need’ paper (Paper 2). It concludes that:

- There is an unprecedented level of need, that exceeds historic trends and is not captured in the trend-based projections used to identify changing numbers of households requiring housing.
- The need was never being met by the current system, as demonstrated by lower than required delivery of affordable tenure housing (against Housing Needs and Demand Assessment 2015 figures) and the failure to reduce the backlog of need that we have demonstrated through monitoring of annual snapshot figures.
- House price rises and increasing and private rental costs against income are making household formation less possible into these tenures.

The In Year Arising Need paper proposes that an additional figure of 194 dwellings per year (across the Highland Council area) is a reasonable estimate of arising need and



that this should be planned for in addition to existing need. This figure has been proportioned across the ten housing market areas based on the capacity of available stock in each housing market area to accommodate need.

The paper concludes that an additional 14 dwellings per year (for 2020 – 2039) should be added to the Badenoch and Strathspey housing market area, to represent the 'in year' shortfall. This figure is similar to the proportion allocated to Skye and Lochalsh and Lochaber housing market areas. The in year arising need is catered for in the social rent and below market rental sectors across the Highland Council area based on a 69% / 31% split that assumes that the Housing Needs and Demand Assessment tool tenure proportions will continue through the period of the projections. The closest approximation of this for the Badenoch and Strathspey housing market area is a 71% / 29% split (10 social rent and 4 below market rent) as set out in Table 20.

Table 20 Tenure split for in year arising need for Badenoch and Strathspey housing market area (Highland Council, Housing Needs and Demand Assessment 2020).

In Year Arising Need Tenure Split	Badenoch and Strathspey housing market area		
	10-year	5-year	annual
Social Rent – 69%	97	48	10
Below Market – 31%	43	22	4
Total	140	70	14

The derived need and demand dwelling numbers for each housing market area are based on the 2018 high migration household projections, which estimate the number of new households which are likely to form in the area, plus existing need (over a 10-year period to clear the backlog) plus in year arising need. This is referred to as scenario 22 in the Housing Needs and Demand Assessment.

In summary, for the Badenoch and Strathspey housing market area, the annual need and demand total for the high migration plus in year arising need is 64 new dwellings per year between 2020 and 2024, 52 new dwellings per year between 2025 and 2029 and 30 dwellings per year between 2030 and 2039. This is set out in Table 21. Within these totals, for the period up to 2029, 71% of the need is for affordable housing, with 50% of this need for social rented housing. The all-tenure housing figure reduces in each subsequent five-year period, because the projected rate of household growth slows down. This reduces the market housing demand over time.



Table 21 Five-year period need and demand totals for the Badenoch and Strathspey housing market area under scenario 22 (high migration plus 'in year arising' need) (Highland Council, Housing Needs and Demand Assessment 2020).

Badenoch and Strathspey housing market area	2020 – 2024		2025 – 2029		2030 – 2034		2035 – 2039	
All-tenure housing figure	318	100%	261	100%	150	100%	150	100%
Market housing	92	29%	56	21%	35	23%	30	20%
- Private rented stock	51	16%	32	12%	20	13%	20	13%
- Owner occupied	41	13%	24	9%	15	10%	10	6%
Affordable housing	226	71%	205	79%	115	77%	120	80%
- Social rented stock	158	50%	151	58%	70	47%	75	50%
Newly forming households	31		26		20		25	
Existing need	79		79		0		0	
In year arising	48		48		48		8	
- Below market	68	21%	54	21%	45	30%	45	30%
Newly forming households	46		32		25		25	
In year arising	22		22		22		22	
Annual housing figure	64		52		30		30	

Based on the figures in Table 21, the housing required for Badenoch and Strathspey as adjusted to align with the National Park's timescales for the next local development plan would be as set out in Table 22:

Table 22 Ten-year all-tenure, market and affordable housing figures for Badenoch and Strathspey based on scenario 19 (high migration plus existing need plus 'in year arising' need) adjusted to align with the Cairngorms National Park's timescales for the next local development plan. (Highland Council, Housing Needs and Demand Assessment 2020).

	Local development plan period 2027 – 2036	
All-tenure housing figure	366	
Market housing figure	87	22%
Affordable housing figure	286	78%
Annual housing figure	37	



Highland Council Local Housing Strategy 2023

The Highland Council's Local Housing Strategy was adopted in February 2023 and covers the five-year period of 2023 – 2028. It states that the annual housing supply target for Highland has been set at 1,840 dwellings per annum, with a 40% target for affordable housing and a 60% target for market housing.

This equates to an overall housing supply target of 9,200 dwellings during the five-year life of the Local Housing Strategy (2023 – 2028). This is approximately double the estimated level of housing need identified in the Housing Need and Demand Assessment, which, under scenario 22 - 'high migration plus in year need' – estimates a need for 9,037 new homes in Highland over 10 years (2020 – 2029).

Appendix 2 of the Local Housing Strategy provides the methodology for setting the housing supply targets. It explains that the Housing Need and Demand Assessment estimates identified a tenure split of 68% affordable housing and 32% market housing over the five-year period 2019 / 2020 to 2023 / 2024.

This is a reverse of the tenure delivery profile of historic completions between 2017 / 2018 to 2021 / 2022, which had a tenure split of 27% affordable housing and 63% market housing, because the delivery of affordable housing relies of contributions from market housing. Hence, if housing supply targets were based on unadjusted Housing Need and Demand Assessment estimates, the strategy argues that it is likely that while the market housing would be delivered, the amount of affordable housing would be much less than the Housing Need and Demand Assessment indicates is required.

This is true for completions in 2020 – 2023 (Table 17) which, as shown in



Table 23, exceed the overall Housing Need and Demand Assessment target by 26%, but provide only 40% of the affordable housing need target. This led to the construction of over three times as many market houses as the Housing Need and Demand Assessment calculates are required.



Table 23 2020 – 2023 housing completions for Badenoch and Strathspey housing market area, compared to market and affordable housing targets within the Housing Need and Demand Assessment, based on scenario 19 (high migration plus existing need plus 'in year arising' need) (Highland Council).

	2020 – 2023 completions	2020 – 2023 Housing Need and Demand Assessment target	% of Housing Need and Demand Assessment target
Market	250	76	329%
Affordable	73	180	41%
Total	323	256	126%

Therefore, the paper explains, the methodology for the housing supply targets should 'not assume market supply targets below the rate of historic completions as a baseline, whilst the estimated need for affordable housing should be projected and maintained in an attempt to address the backlog of housing need in Highland communities'.

The housing supply target methodology also adjusts the housing estimates for both market and affordable housing.

In relation to market housing, a 15% adjustment is added to each housing market area based on the economic development evidence. 30% is added to the East Ross, Inverness and Mid Ross housing market areas. This responds to draft proposals for the Inverness and Cromarty Firth Green Freeport.

Since the Local Housing Strategy was published, a detailed business case for the freeport has been developed. The Highland Council published, in June 2024, a briefing paper 'Inverness & Cromarty Firth Green Freeport Housing Supply Targets', to recalibrate the housing supply targets to take account of this business case. The paper, by Arneil Johnston, adopts a methodology used in a report published in November 2022 on the implications of East Midlands on housing need in North West Leicestershire. It is the only published example to date of aligning economic and housing growth assumptions to reflect the designation of Green Freeport status.

The paper explains that the detailed business case for the Inverness and Cromarty Firth Green Freeport estimates that 10,192 direct jobs will be created in the East Ross and Inverness Housing Market Areas and, taking into account existing jobs which may be lost or displaced during the 10-year period of the housing supply targets, estimates that 8,427 net direct jobs will result from the greenport proposals – again in the East Road



and Inverness housing market areas. The paper adjusts the housing supply targets for the East Road and Inverness housing market areas. While this significantly increases the housing targets for The Highland Council no adjustments are made to the housing targets for the Badenoch and Strathspey housing market area.

An adjustment is made to reflect current levels of second homes in each housing market area, to counter the expectation that a proportion of future house completions will be 'lost' from the residential market. In Badenoch and Strathspey 10% is added.

In relation to affordable housing, it uses weightings to adjust the distribution of affordable housing in each housing market area. 25% of the overall affordable housing estimate is adjusted to reflect affordable housing pressure ratios and 25% is adjusted to reflect economic growth aligned to Opportunity Cromarty Firth.

The result of these adjustments, as set out in the methodology paper, is listed in Table 24 for market housing and



Table 25 for affordable housing. The figures are provided for both the Badenoch and Strathspey housing market area and Highland Council as a whole.

In relation to affordable housing, 25% of the overall affordable housing supply target is distributed to East Ross, Inverness and Mid Ross housing market areas to reflect Opportunity Cromarty Firth. 6% of the overall affordable housing supply target is redistributed to the Badenoch and Strathspey housing market area to reflect housing pressure (by far the highest proportion redistributed to reflect housing pressure). The result is that an additional 89 dwellings are added to the Badenoch and Strathspey housing market area affordable housing supply target.

Further analysis was then performed to test the delivery potential of the housing estimates by housing market area and tenure, taking account of established land supply over a fifteen-year period (2021 – 2036).

The outcome for the Badenoch and Strathspey housing market area and the Highland Council area as a whole is provided in

Table 26. It indicates, for Badenoch and Strathspey that the five-year (2023 – 2028) housing supply target of 641 dwellings cannot be met by the current five-year (2021 – 2026) effective land supply of 586 dwellings. However, taking account of the ten-year established land supply, which straddles the delivery period for the housing supply target, there is a surplus of 382 dwellings. The housing land strategy concludes that there is 'scope to develop the land resources required' to meet the step change in housing supply the strategy proposes and that the five-year housing supply targets for each housing market area and for Highland as a whole can be delivered.

Based on this analysis, five-year housing supply targets (2023 – 2028) were set. Table 27 sets out the targets for the Badenoch and Strathspey housing market area and for Highland as a whole. The annual housing supply targets are set out in Table 28.



Table 24 Adjusted Housing Supply Targets for market housing for Badenoch and Strathspey housing market area and Highland Council as a whole (The Highland Council, Methodology Paper: Housing Supply Targets (Appendix 2 of the Highland Council Local Housing Strategy, 2023)).

	Proposed housing supply target starting point 2023 – 2028 (five-year housing market completions)	Housing market area percentage market tenure estimate	Adjustment for ineffective stock (second homes)	Allowanc e for ineffective stock	Adjustment for economic growth	Addition for economic growth	Adjusted market housing target 2023 – 2028
Badenoch and Strathspey	260	5.7%	10%	26	15%	39	325
Highland	4,535	100%		180		1,092	5,807



Table 25 Adjusted Housing Supply Targets for affordable housing for Badenoch and Strathspey housing market area and Highland Council as a whole (The Highland Council, Methodology Paper: Housing Supply Targets (Appendix 2 of the Highland Council Local Housing Strategy, 2023)).

	Housing Need and Demand Assessment Affordable Housing Need 2023 – 2028	Affordable Housing Need and Demand Assessment split: 50% weighting	Adjustment for housing pressure: 25% weighting	Housing pressure adjustment	Adjustment for economic growth: 25% weighting	Economic growth adjustment	Total adjusted affordable housing supply target 2023 – 2028
Badenoch and Strathspey	226	113	6%	202	0	0	315
Highland	3,396	1698	25%	849	25%	849	3,396

Table 26 Analysis of Adjusted Housing Supply Estimates for Badenoch and Strathspey housing market area and Highland Council as a whole (The Highland Council, Methodology Paper: Housing Supply Targets (Appendix 2 of the Highland Council Local Housing Strategy, 2023)).

	Adjusted five-year Housing Supply Target 2023 – 2028	Effective land supply 2021 – 2026	Housing land audit 2026 – 2031	Housing land audit 2031 – 2036	Ten-year established land supply 2021 – 2031	Fifteen-year established land supply 2021 – 2036	Shortfall / surplus five-year established land supply	Shortfall / surplus ten-year established land supply
Badenoch and Strathspey	641	586	437	229	1,023	1,252	-55	382
Highland	9,203	6,626	4,237	2,475	10,863	13,338	-2,577	1,660



Table 27 Five-year Housing Supply Targets 2023 - 2028 by tenure for Badenoch and Strathspey housing market area and Highland Council as a whole (Highland Council, Methodology Paper: Housing Supply Targets (Appendix 2 of the Highland Council Local Housing Strategy, 2023)).

	Adjusted affordable Housing Supply Target	Adjusted market Housing Supply Target	Total Housing Supply Target 2023 - 2028	Affordable Housing Supply Target (%)	Market Housing Supply Target (%)
Badenoch and Strathspey	300	350	650	46%	54%
Highland	3,400	5,800	9,200	37%	63%

Table 28 Annual Housing Supply Targets 2023 – 2028 by tenure for Badenoch and Strathspey housing market area and Highland Council as a whole (Highland Council, Methodology Paper: Housing Supply Targets (Appendix 2 of the Highland Council Local Housing Strategy, 2023)).

	Total Housing Supply Target	Affordable Housing Supply Target (%)	Market Housing Supply Target (%)
Badenoch and Strathspey	130	45%	55%
Highland	1,840	40%	60%

The Strategy also includes a delivery framework which comprises a series of more detailed Action Plans identifying the timescales, resources and partner responsibilities needed to progress and achieve these priorities.



Highland Council Strategic Housing Investment Plan 2023

The Highland Council's Strategic Housing Investment Plan was adopted in April 2023 and sets the targets for affordable housing and how resources will be used over the five-year period of the Plan to 2028.

The Strategic Housing Investment Plan sets a strategic target to deliver 3,400 affordable homes over the five-year period to 2028. This includes 300 affordable homes in Badenoch and Strathspey. For this area, Aviemore is listed (in Annex 1) as the highest priority for housing, with all other communities (excluding Dalwhinnie) listed as priorities.

An indicative planned investment programme to 2028 is included (Appendix 2). It plans for 246 affordable homes from 2021 - 2028, as set out in Table 29.



Table 29 Highland Council indicative planned investment programme for Badenoch and Strathspey 2023 – 2028 (Highland Council, Highland Strategic Housing Investment Programme, 2023 – Appendix 2).

	Tenure						% of total Highland Council							
	Social Rent The Highland Council	Housing Association Rent	Low Cost Home Ownership (ALL)	Mid Market Rent	Rural Housing Fund	Total		pre 2022 / 2023 - yet to complete	2022 / 2023	2023 / 2024	2024 / 2025	2025 / 2026	2026 / 2027	2027 / 2028
Aviemore, Aviemore Former School	16					16				16				
Aviemore, Reidhaven Estate (Dalfaber)			3			3					3			
Aviemore, regeneration (Morlich Court)		24		6		30				30				
Aviemore, North		30		10		40							40	
Carrbridge, Carr Road	5			6		11			11					
Carrbridge, Struan Hotel	6			4		10				10				
Cromdale	1					1		1						
Cromdale S75	2			2		4					4			
Dulnain Bridge					8	8				8				
Dulnain Bridge, Rose Cottage	6			4		10		10						
Grantown on Spey, Castle Road		20	7	8		8								35
Kincraig, Phase 1	6			4		10		10						



	Tenure						% of total Highland Council							
	Social Rent The Highland Council	Housing Association Rent	Low Cost Home Ownership (ALL)	Mid Market Rent	Rural Housing Fund	Total		pre 2022 / 2023 - yet to complete	2022 / 2023	2023 / 2024	2024 / 2025	2025 / 2026	2026 / 2027	2027 / 2028
Kincraig, Phase 2	6			4		10	5.9%			10				
Kinguissie	15			8		23			23					
Kinguissie, High Street (Badenoch House)	6					6			6					
Nethy Bridge, Laing	5			0		5				5				
Nethybridge, Lettoch Road		6		0		0						6		
Newtonmore		8	4	6		6				18				
Sub-total	74	88	14	62	8	246	5.9%	21	40	97	7	6	40	35



Badenoch and Strathspey Business Insights

Highland Council and Cairngorms Business Partnership commissioned 56 Degree Insight to undertake the 'Badenoch and Strathspey Business Housing Needs Survey' of businesses in 2021, to better understand why almost a third (29%) of businesses in the area predicted that a lack of affordable housing for staff to live in would be a major problem. The key findings were:

- 1 in 8 staff employed in the area live outside Badenoch and Strathspey.
- The number of positions businesses sought to recruit for had increased in 2018 – 2020, but the number of applicants had decreased, with 38% noting a decrease in local applicants, particularly in the hospitality and retail sectors.
- 56% of businesses indicated that from 2018 – 2020, they had experienced an individual not taking up a job offer, with over 50% of those candidates citing lack of accommodation and / or lack of transport options in the area.
- Overall, the survey estimates that this could mean 500 positions (30% of the total) will be difficult to fill over the next 12 months.
- Recruitment and retainment of vital roles such as cleaning and housekeeping, chefs and other kitchen staff is the issue of greatest concern raised, which often relates to middle income bands and younger people.
- Businesses also indicated that they are affected indirectly by this issue, such as hospitality venues opening shorter hours due to shortage of staff, a lack of tradespeople and a lack of affordable accommodation for contractors.

The Cairngorms Business Barometer – Quarter 1 (January to March) 2024 report indicates that the issue remains just as strong a concern with the lack of housing most often cited as the issue with recruiting staff.



Highland Council summary and indicative housing land requirement

The starting point for considering an indicative housing land requirement is the Scottish Government's ten-year minimum all-tenure housing land requirement for the Cairngorms National Park of 850 dwellings¹⁹. This is calculated by considering existing and projected housing need within the National Park in three constituent authorities, including Highland Council.

Table 30 Summary of the housing evidence figures relevant to the Highland Council part of the Cairngorms National Park, for the period of the local development plan 2027 – 2036. (Highland Council and Scottish Government).

All tenure	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	Total
Government minimum all-tenure housing land requirement (derived figure for Highland Council)	65	65	65	65	65	65	65	65	65	65	645
Housing Need and Demand Assessment 2020 – 2039	52	52	52	30	30	30	30	30	30	30	367
Housing Supply Target 2023 – 2028	130	-	-	-	-	-	-	-	-	-	-

Market housing	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	Total
Housing Need and Demand Assessment 2020 – 2039	11	11	11	7	7	7	7	7	6	6	79
Housing Supply Target 2023 – 2028	72	-	-	-	-	-	-	-	-	-	-

¹⁹ As set out under National Planning Framework 4 Policy 16. See: <https://www.gov.scot/binaries/content/documents/govscot/publications/strategy-plan/2023/02/national-planning-framework-4/documents/national-planning-framework-4-revised-draft/national-planning-framework-4-revised-draft/govscot%3Adocument/national-planning-framework-4.pdf>



Affordable housing	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	Total
75% of the Government minimum all-tenure housing land requirement (derived figure for Highland Council)	48	48	48	48	48	48	48	48	48	48	483
Housing Need and Demand Assessment 2020 – 2039	41	41	41	23	23	23	23	23	24	24	287
Housing Supply Target 2023 – 2028	59	-	-	-	-	-	-	-	-	-	-

Table 30 summarises the housing evidence relevant to the local development plan period 2026 – 2037 for the Highland Council part of the Cairngorms National Park in order to derive an indicative housing land requirement. The key points are that:

- In their methodology, the Scottish Government identifies a default 10-year figure ten-year housing need figure for Highland Council of 514 dwellings (76% of the total for Cairngorms National Park). Taking account of the 30% flexibility allowance and rounding to arrive at 850 dwellings, the Highland Council part of the 10-year all-tenure minimum local housing requirement is 645 dwellings.
- The Housing Need and Demand Assessment estimates a 10-year all-tenure housing need of 366 dwellings between 2027 – 2036. The affordable housing need represents around 78% of this total, averaging at 37 dwellings per year.
- The Local Housing Strategy sets a housing supply target for 2023 – 2028. It redistributes affordable housing need across the Highland Council's housing market areas to reflect where economic growth is expected and where there is greatest housing pressure. Badenoch and Strathspey housing market area is identified as the area with the greatest housing pressure. This results in a housing supply target of 59 affordable dwellings per year up to 2028. To meet this target and to respond to Highland's ambitions for economic growth, 72 market dwellings are targeted each year. This would result in 45% affordable housing and 650 new dwellings over the five-year period (130 dwellings per year).
- The evidence indicates that the Scottish Government's identified 10-year all-tenure minimum housing land requirement figure for Highland Council of 645 dwellings is ambitious and higher than the evidenced need and there is no evidence to set a higher requirement.



- Completions in the Highland area of the Cairngorms National Park averaged 69 dwellings per year between 2013 and 2023, but this has increased, with 118 completions in 2022 and 116 in 2023. 23% of these are affordable dwellings.
- Highland Council's housing land audit 2023 indicates that there is a five-year (2023 – 2028) effective land supply of 401 dwellings (80 dwellings per year), however this reduces to 204 dwellings (41 dwellings per year) between 2028 – 2032.
- While the affordable housing need within Badenoch and Strathspey is very high, the National Park Authority already successfully seeks 45% affordable housing provision on new development in its larger settlements and the Partnership Plan targets that 75% of new housing is for social rental, mid-market rental or other affordable categories that provide affordability in perpetuity.
- The identified affordable housing need, taking account of the Local Housing Strategy 2023 – 2028, is 304 affordable dwellings for the local development plan period. An appropriate affordable housing requirement can be set on a settlement by settlement basis.
- In the absence of more recent evidence indicating that a higher requirement is necessary, it is proposed that the indicative local housing requirement should be based on the Scottish government's minimum all-tenure housing land requirement. This would achieve both the identified affordable housing need and market housing demand for 2027 – 2036.

Aberdeenshire Council

Aberdeen City and Shire Councils Housing Need and Demand Assessment 3: 2023 – 2028

The Housing Need and Demand Assessment 3: 2023 – 2028 was published in January 2024 and signed off by the Scottish Government Centre for Housing Market Analysis as being robust and credible in January 2024.

It identifies two housing market areas – the Aberdeen housing market area comprising Aberdeen City (and a 20-mile radius) and the Rural housing market area which covers the rest of Aberdeenshire including the Cairngorms National Park.

The Cairngorms National Park forms a relatively small part of the Aberdeen City and Aberdeenshire area, with the estimated population of the National Park within the Aberdeenshire area totalling around 3,000 people in 2022, which is just 0.6% of the total in Aberdeen City and Aberdeenshire.



The Housing Need and Demand Assessment sets out annual household income by area and this highlights that median and lower quartile house prices are significantly higher in the Cairngorms National Park area of the Rural housing market area than in the Rural housing market area as a whole. Household incomes are also higher, but not proportionally so. This means houses are less affordable for local people in the Cairngorms National Park part of the Aberdeenshire Rural housing market area. This is shown in



Table 31, which extracts data from Tables 2.18 – 2.20 of the Housing Need and Demand Assessment.

Buying a house is unaffordable if the house price to household income ratio is more than four (coloured red), and affordable if it is below four (green). Using this measure, households with lower quartile income cannot afford to buy a lower quartile house in any part of Scotland and the ratio is significantly higher (7.5) in the Cairngorms National Park part of the Rural Housing Market Area. This reflects the housing market context analysis earlier in this evidence report.

It is informative to note that the Housing Need and Demand Assessment states that the ratio in Aberdeenshire as a whole, including in the Rural housing market area is lower and hence affordability better now than at the time of the last Housing Need and Demand Assessment. It is not clear that this applies to the Cairngorms National Park part of Aberdeenshire however, where lower quartile house prices remain unaffordable for those on median household incomes.

More fine-grained analysis in the Housing Need and Demand Assessment shows that there is considerable variation in house prices within the Rural housing market area and that generally, lower prices (a lower quartile house price of less than £100,000) are found in the more peripheral parts of the housing market area. The Housing Need and Demand Assessment suggests that this may enable households to find houses that they can afford in other parts of the Rural housing market area, if they are able to move. However, these examples are mainly in the north of Aberdeenshire (Peterhead, Fraserburgh, Banff / Macduff, Turriff and Huntly), not in the peripheral parts of the Rural housing market area within the Cairngorms National Park.



Table 31 House price to income affordability ratios by area (Aberdeenshire Housing Need and Demand Assessment 3: 2023 - 2028). Buying a house is unaffordable if the house price to household income ratio is more than four (coloured red), and affordable if it is below four (green).

Geography	House price 2019 / 2020		Annual household income by area 2018		House price to income affordability ratios by area		
	Lower quartile price	Median price	Lower quartile income	Median income	Lower quartile price / lower quartile income	Lower quartile price / median income	Median price / median income
Scotland	£100,000	£156,000	£17,160	£28,600	5.8	3.5	5.5
Aberdeenshire rural housing market area	£110,000	£165,000	£18,720	£32,240	5.9	3.4	5.1
Cairngorms National Park part of the rural housing market area	£156,875	£195,300	£20,800	£34,320	7.5	4.6	5.7

The Housing Need and Demand Assessment provides commentary on the numbers of second homes. Broadly, the average proportion of second homes in Aberdeenshire is 1%, similar to the Scotland average proportion of 0.9%. However, the assessment highlights that the proportion rises to 2.45% in the Marr administrative area. Marr includes Ballater and Braemar. It also includes smaller villages (including Dinnet and Strathdon) where, the Housing Need and Demand Assessment states, the availability of social rented stock is limited and there are also very few private rentals.

The assessment advises that local intelligence suggests that many people work locally in Braemar and Ballater and do not want to travel further. The assessment also highlights that the main employment sectors in this area are hospitality, accommodation and retail, which is typically seasonal and low paid work, meaning private rental properties, if available, would not be affordable for most. Note also that Ballater and Braemar are identified as two of the 'most pressured settlements in Aberdeenshire'. These settlements have been identified by ranking all settlements based on housing



need (based on average waiting list demand and turnover of stock). Ballater ranks 15th most pressured and Braemar 24th²⁰.

The Housing Need and Demand Assessment models four different population and household growth scenarios which comprise the Housing Needs and Demand Assessment Tool's Default (scenario 1), Principal Growth (scenario 2), High Migration (scenario 3) and High Migration Plus (scenario 4).

The Housing Needs and Demand Assessment advises (pages 143 and 172) that a high migration plus scenario was deemed necessary due to concerns that the 2018 National Records for Scotland's projections (which are also used by the Scottish Government to calculate the All-Tenure Minimum Housing Land Requirement) were relatively outdated and may underestimate future growth. The High Migration Plus scenario shares similar assumptions and variables to the high migration scenario, but with a household growth adjustment of 0.2% for the Aberdeenshire Rural housing market area between 2023 – 2028. It aims to provide an alternative estimate which factors in the short-term impact of future need from refugees, asylum seekers and resettlement groups (for example from Ukraine).

The default scenario calculates an existing need for 880 dwellings across Aberdeen City and Aberdeenshire using the Housing Need and Demand Assessment tool. A local authority generated existing need figure of 1,236 dwellings (247 dwellings for the Rural housing market area) has also been calculated and added to the first ten-years of the housing estimates calculated for scenarios 2, 3 and 4.

These scenarios, set out in

²⁰ Table 4 and explanatory text in the draft Aberdeenshire Local Housing Strategy, May 2024.



Table 32, estimate an annual existing and future housing need for the Rural housing market area of between 352 and 517 new dwellings over the period 2023 – 2027, and between 226 and 300 for the 2028 – 2032 period.

The Housing Need and Demand Assessment does not identify a preferred scenario, instead highlighting that the results will be monitored through the Local Housing Strategy and a mid-term review of the Housing Need and Demand Assessment. It does note that there is a substantial increase in the number of dwellings required in scenario 4 when compared to scenarios 1 and 2, as well compared to scenario 3.



Table 32 Additional housing units needed, per annum, for each five-year band in the Aberdeenshire Rural housing market area, for scenarios 1 – 4 (Aberdeenshire Council, Housing Needs and Demand Assessment 3: 2023 – 2028).

Scenario	2023 – 2027	2028 – 2032	2033 – 2037	2038 – 2042
Scenario 1 (Default)	371	226	178	158
Scenario 2 (Principal growth)	352	251	178	158
Scenario 3 (High migration)	386	300	237	228
Scenario 4 (High migration plus)	517	300	237	227

Table 33 sets out the figures for each tenure for the principal (scenario 2) and high migration (scenario 3) options. It estimates the need for high levels of affordable housing of 49% over the first 10 years (2023 – 2032) and 43% over the next ten years (2033 – 2042).

Table 33 Additional housing units needed, per annum, for each five-year band by tenure, in the Aberdeenshire Rural Housing Market Area, for scenarios 2 and 3 (Aberdeenshire Council, Housing Needs and Demand Assessment 3: 2023 – 2028).

Aberdeenshire rural housing market area	2023 – 2027		2028 – 2032		2033 – 2037		2038 – 2042	
Scenario 2 (Principal growth)	352		251		178		158	
All-tenure housing figure								
Market per year	181	52%	127	52%	101	57%	90	57%
- Private rented stock	75		51		39		34	
- Owner occupied	106		76		62		56	
Affordable per year	171	49%	124	49%	77	43%	68	43%
- Social rent	100	28%	77	31%	40	22%	33	21%
Newly forming households	75		52		40		33	
Existing Need	25		25		0		0	
- Below market	71	20%	47	19%	37	21%	35	22%
Scenario 3 (High migration)	386		300		237		228	
Market per year	200	52%	154	52%	132	57%	130	57%
- Private rented stock	83		62		52		49	
- Owner occupied	117		92		82		81	



Aberdeenshire rural housing market area	2023 – 2027		2028 – 2032		2033 – 2037		2038 – 2042	
Affordable per year	186	48%	146	48%	103	43%	98	43%
- Social rent	108	28%	88	29%	54	22%	48	21%
Newly forming households	83		63		54		48	
Existing Need	25		25		0		0	
- Below market	78	20%	58	19%	49	21%	50	22%

Housing need is not provided at the Cairngorms National Park level, so the Aberdeenshire Rural housing market area is the closest equivalent for calculating need for the Cairngorms National Park's Local Development Plan.

One crude method of estimating housing need in the Cairngorms National Park from the Housing Need and Demand Assessment figures, is to disaggregate the figure based on population. 2.2% of the population of the Rural housing market area lives in the Cairngorms National Park, therefore it could be assumed that 2.2% of the housing need is in the Cairngorms National Park. Table 34 sets out the likely need and demand for the Cairngorms National Park for the high migration scenario using this population-based method. The figures relate to the timeframe for the Local Development Plan (2027 – 2037).

Table 34 Ten-year scenario 3 (high migration) need and demand figures for the Cairngorms National Park part (based on population) of Aberdeenshire rural housing market area adjusted to align with the Cairngorms National Park's timescales for the next local development plan (Aberdeenshire Council, Housing Needs and Demand Assessment 3: 2023 – 2028).

Housing Need and Demand Assessment 2023 - 2028 rural housing market area (population-based proportion – 2.2%) – high migration	Local development plan period 2027 – 2036	
All-tenure housing figure	62	
Market housing figure	33	53%
Affordable housing figure	29	47%
Annualised housing figure	6	



Aberdeenshire Council Local Housing Strategy 2024 – 2029

The Local Housing Strategy 2024 – 2029 was published in September 2024. It uses evidence from the Aberdeen City and Aberdeenshire Housing Needs and Demand Assessment 2023 – 2028 to inform the strategy and enable a supply of housing across all tenures.

The strategy includes a housing supply target Methodology Paper, which sets housing supply targets for Aberdeenshire for the next five-, ten- and twenty-year periods. It utilises the high migration scenario and highlights that the recent Homes for Scotland report on existing housing need in Scotland would support this. The strategy advises that the High Migration Plus scenario is not used as the basis for setting the housing supply target because of the uncertainty over likely future numbers of refugees and asylum seekers and the very high numbers of additional houses it generates in the first five years, which is considered unrealistic from a delivery perspective.

An average housing supply target for Aberdeenshire of 1,000 dwellings per year over the 20-year period has been set, with a target of 250 affordable dwellings per annum and 750 market dwellings. The methodology to generate this target is set out in Appendix 2 of the Local Housing Strategy.

It highlights that the target for market dwellings per year (750 dwellings for the whole of Aberdeenshire) is well in excess of the number identified in the Housing Need and Demand Assessment high migration scenario 20-year average market dwellings per year (283 dwellings) and has been calculated to achieve 250 affordable dwellings per year. It is noted that the affordable housing need identified in the Housing Need and Demand Assessment for the first five years (2023 – 2028) is significantly higher than past delivery (a need for 326 affordable dwellings per year, with a delivery rate of around 200 dwellings per year), but that after the first five years the affordable need drops to 255 dwellings per year from 2028 – 2032, then 181 in 2033 – 2037, then 172 dwellings in 2038 – 2042. This gives an average need of 234 dwellings per year over the whole 20-year period. A target of 250 affordable housing completions per year is proposed to 'consistently address the level of need arising over the whole period' and to 'be realistic in terms of delivery in the short term'.

The 1,000 dwelling housing supply target has been split 55 / 45 between the Aberdeen and Rural housing market areas, leading to the housing supply target for the Rural housing market area set out in Table 35. If the target for the Cairngorms National Park of Aberdeenshire is calculated by population size (2.2% of the population of the rural Aberdeenshire rural housing market area), the housing supply target would be as set



out in Table 36. This would be a housing supply target of 100 dwellings for the local development plan 10-year period, with 28% to be secured as affordable housing.

Table 35 Annualised draft housing supply target for Aberdeenshire Rural housing market area (Aberdeenshire Council, Aberdeenshire Council Local Housing Strategy 2024 – 2029: Appendix 2: Housing supply target methodology paper).

	For each year from 2023		Total 2023 – 2042
Market housing per year	338	75%	6,750
Private rent	179	40%	3,577
Owner-occupied	159	35%	3,173
Affordable housing per year	112	25%	2,250
Social rent	101	22%	2,025
Below market	11	3%	225
Total per year	450		9,000

Table 36 Proportional (based on 2.2% population) housing supply target for the Cairngorms National Park part of Aberdeenshire's rural housing market area, aligned for the local development plan time period (Aberdeenshire Council, Aberdeenshire Council Local Housing Strategy 2024 – 2029: Appendix 2: Housing supply methodology paper).

Local Housing Strategy 2024 – 2029 Housing land supply rural housing market area (population-based proportion – 2.2%)	For each year from 2024 – 2042	Local Development Plan period 2027 – 2037
Market housing – 75%	7.5	75
Affordable housing- 25%	2.5	25
Total	10	100

Aberdeenshire Council Local Development Plan 2029 Evidence Report - Quality Homes Topic Paper (September 2024)

The topic paper prepared for Aberdeenshire Council's evidence report, proposes an indicative ten-year housing land requirement for Aberdeenshire. To set this, the housing supply target is first adjusted to exclude the Cairngorms National Park area. This adjusted figure is 9,800 for a 10-year period. This adjusted figure is based on the assumption that the Cairngorms National Park Authority will set a figure of 200 dwellings over 10 years as its housing land requirement for the Aberdeenshire part of the Cairngorms National Park Authority in its next Local Development Plan.



The topic paper notes that the Scottish Government's minimum all-tenure housing land requirement for the Cairngorms National Park is 850 dwellings and that related method paper assumes that approximately 20% of the minimum figure (which equates to 170 units) will be in Aberdeenshire.

The topic paper does recognise that The Cairngorms National Park Authority figure will be subject to land availability in Ballater, Braemar and Dinnet, which is known to be constrained and that Aberdeenshire Council and the Cairngorms National Park Authority will need to continue to work together to meet housing need.

Aberdeenshire Council Strategic Housing Investment Plan 2023 – 2028

Aberdeenshire Council's Strategic Housing Investment Plan, published in November 2023, sets out the investment priorities for affordable housing over the five-year period from 2024 to 2029. The Strategic Housing Investment Plan does not apportion investment resources to specific locations however it does identify settlements with increased housing pressure and in respect of the National Park, Ballater is identified as a medium priority.

The Strategic Housing Investment Plan notes that there is significant pressure on 1-bedroom units and larger 3-, 4- and 5-bedroom units and particular needs housing stock. Aberdeenshire Council identify that at least 15% of affordable new build housing will be allocated to particular needs households. Of this 15%, 10% is required to be wheelchair accessible and they will encourage 10% of all new private housing developments of more than 20 units to be wheelchair accessible.

The Strategic Housing Investment Plan identifies the potential for 1,972 new affordable homes, of which 445 will be delivered through existing landbanks owned by the affordable housing providers. The other 74% will be through contributions from private housebuilders, highlighting the dependence on consistent delivery of market housing to generate affordable provision.

Aberdeenshire has taken a collaborative approach to bringing empty properties back into use during 2022 / 2023. This includes a registered social landlord converting an empty property in Ballater into 12 energy efficient affordable homes for social rent, three of which are suitable for particular needs housing.

The related Project Plan anticipates that 15 mid-market rent affordable homes will be constructed on the Kindrochit Court site at Braemar (Local Development Plan 2021 housing site H3). Five of these will be particular needs housing and two will be



wheelchair accessible. It is anticipated that construction will start in 2025 / 2026 and complete in 2026 / 2027.

Aberdeenshire Council summary and indicative housing land requirement

The starting point for considering an indicative housing land requirement is the Scottish Government's ten-year minimum all-tenure housing land requirement for the Cairngorms National Park of 850 dwellings. This is calculated by considering existing and projected housing need within the National Park in three constituent authorities, including Aberdeenshire Council.

Table 37 Summary of the housing evidence figures²¹ relevant to the Aberdeenshire Council part of the Cairngorms National Park, for the period of the local development plan 2027 – 2036. (Aberdeenshire Council and Scottish Government).

All tenure	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	Total
Government minimum all-tenure housing land requirement (derived figure for Aberdeenshire Council)	17	17	17	17	17	17	17	17	17	17	170
Housing Need and Demand Assessment 3 (2.2% population-based figure)	8	7	7	7	7	7	5	5	5	5	62
Housing Supply Target 2023 – 2042 (2.2% population-based figure)	10	10	10	10	10	10	10	10	10	10	100

Market Housing	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	Total
Housing Need and Demand Assessment 3 (2.2% population-based figure)	4	3	3	3	3	3	3	3	3	3	33
Housing Supply Target 2023 – 2042 (2.2% population-based figure)	7.5	7.5	7.5	7.5	7.5	7.5	7.5	7.5	7.5	7.5	75

²¹ All figures rounded to nearest whole number.



Affordable Housing	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	Total
75% of the Government minimum all-tenure housing land requirement (derived figure for Aberdeenshire Council)	13	13	13	13	13	13	13	13	13	13	128
Housing Need and Demand Assessment 3 (2.2% population-based figure)	4	4	3	3	3	3	2	2	2	2	29
Housing Supply Target 2023 – 2042 (2.2% population-based figure)	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	25

Table 37 summarises the housing evidence relevant to the local development plan period 2026 – 2037 for the Aberdeenshire Council part of the Cairngorms National Park in order to derive an indicative housing land requirement. The key points are that:

- In their methodology, the Scottish Government identifies a default 10-year figure ten-year housing need figure for Aberdeenshire Council of 135 dwellings (20% of the total for Cairngorms National Park). Taking account of the 30% flexibility allowance and rounding to arrive at the total of 850 dwellings, the Aberdeenshire Council part of the 10-year minimum all-tenure local housing requirement is 170 dwellings.
- If the housing figures are proportioned based on 2.2% of the population of the Aberdeenshire rural housing market area being within the Cairngorms National Park, then the Housing Need and Demand Assessment estimates a 10-year all-tenure housing need of 62 dwellings between 2027 – 2036. Significantly below the minimum all-tenure local housing requirement for Aberdeenshire Council.
- The Local Housing Strategy sets a Housing Supply Target for 2024 – 2042. Based on 2.2% of the population of the rural housing market area residing in the National Park, the housing supply target for the Cairngorms National Park part of Aberdeenshire Council would be 100 dwellings over a 10-year period. Significantly below the minimum all-tenure local housing requirement for Aberdeenshire Council.
- Completions in the Aberdeenshire part of the National Park averaged 12 dwellings per year (120 for 10-years) between 2013 and 2023 and this average has remained similar in recent years. This is also below the minimum all-tenure local housing requirement for Aberdeenshire Council.
- The housing land audit 2023 indicates that there are 75 dwellings in the five-year effective housing land supply. There are a further 84 dwellings in the following five-



years of the audit. This means that there is a current ten-year pipeline of 159 dwellings (16 dwellings per year).

- The evidence indicates that the Scottish Government's identified 10-year all-tenure minimum housing land requirement figure for Aberdeenshire Council of 170 dwellings is ambitious and higher than the evidenced need.
- Aberdeenshire Council, in their Quality homes topic paper, make an assumption that the Cairngorms National Park Authority will set a figure of 200 dwellings over 10 years as its housing land requirement for the Aberdeenshire part of the Cairngorms National Park Authority in its next Local Development Plan. However, this figure is significantly higher than the evidenced need and the historic completion rate and is not considered to be achievable.
- The affordable housing need identified in the Housing Need and Demand Assessment of 29 dwellings, however the Housing Need and Demand Assessment's estimate of need is for the whole Rural Aberdeenshire housing market area, over which it is recognised that need varies significantly. An appropriate affordable housing requirement can be set on a settlement by settlement basis.
- In the absence of more recent evidence indicating that a higher requirement is necessary, it is proposed that the indicative local housing requirement for the Aberdeenshire Council part of the Cairngorms National Park should be based on the Scottish Government's minimum all-tenure housing land requirement. This would achieve both the identified affordable housing need and market housing demand for 2027 – 2036. A higher requirement is not justified by the evidence, nor achievable.

Moray Council

The Moray Housing Need and Demand Assessment Final Report was published in December 2023. The Scottish Centre for Housing Market Analysis advised in December 2023 that the process and methodology used to produce the Moray Housing Needs and Demand Assessment are robust and credible.

The Housing Needs and Demand Assessment concludes that the housing market area boundaries used in the 2017 Housing Needs and Demand Assessment remain robust. Moray is considered to be a self-contained area, with a functional housing market area, within which six housing market sub-areas exist, including the Cairngorms housing market sub-area.

However, the Cairngorms housing market sub-area is notably different to the five other housing market sub-areas, in that it is dominated by inward migration. An analysis²² of

²² Page 21 of the Moray Housing Need and Demand Assessment.



the origins of households purchasing residential properties in the Cairngorms housing market sub-area reveals that:

- Just 20% of property purchasers in the Cairngorms housing market sub area originate from the Cairngorms area therefore the sub-area area cannot be regarded in any way as a self-contained housing market.
- The remaining housing market sub areas in Moray, exert limited influence on the Cairngorms housing market sub-area with just 14% of all transactions arising from purchasers in the wider Moray area.
- Elsewhere, the Highland Council area has some influence on the operation of the Cairngorms housing market sub-area, with 11% of purchasers originating from this area.
- The Cairngorms National Park is most influenced by a wider national and internal market with inward migration from across Scotland, the UK and beyond substantial at 56%.

The Housing Needs and Demand Assessment models three scenarios to provide an upper and lower range of housing estimates for the period up to 2042 – the principal scenario, high migration scenario and Moray growth scenario. The Moray growth scenario responds to the ambitious Moray Growth Deal, which seeks to drive migration to the area as a result of investment in jobs and infrastructure. This scenario applies a 0.25% uplift to the principal projection for households over the 20-year projection period (2023 and 2042).

These scenarios result in a housing estimate range for the Cairngorms housing market sub-area of between 44 and 59 dwellings between 2022 and 2041 (section 5.7, page 58); 29-33 of which are estimated to be required by 2026.

By tenure, across the Moray area, the Housing Need and Demand Assessment (page 53) estimates that:

- 53% – 58% of housing estimates should be met by social housing.
- 10% – 11% of housing estimates should be met by below market housing.
- 15% – 17% should be met by market rented housing.
- 17% – 19% should be met by market housing.

Under the growth scenario, the all-tenure housing estimate is 3,568 dwellings between 2022 – 2026, falling to 1,080 between 2027 – 2031, 1,084 between 2032 – 2036 and 998 between 2037 and 2041. The 2022 – 2026 total includes 2,160 dwellings to meet the identified existing need. These figures are set out in Table 38.



The Housing Need and Demand Assessment calculation shows that, in the Cairngorms housing market sub-area, over the next 20 years, 59 dwellings are needed to meet household growth. This includes 21 dwellings to meet existing housing need. 42% of households will require social housing to meet their housing need and a further 14% below market housing, meaning that 56% of housing needs to be in the form of affordable homes. The figures for the sub-areas are not broken down into five-year periods. The available figures are set out in Table 39. The figures are approximately 1% of the totals for Moray housing market area.

Table 38 Additional housing units needed, for each five-year band, in the Moray housing market area for scenario 3 (growth 0.25%) (Moray Council, Housing Needs and Demand Assessment, 2023).

Moray housing market area Scenario 3 (growth 0.25%)	2022 – 2026	2027 – 2031	2032 – 2036	2037 – 2041
Newly forming households	1,408	1,080	1,084	998
Existing Need	2,160	0	0	0
Total	3,568	1,080	1,084	998

Table 39 Additional housing units needed, for the twenty-year band by tenure, in the Cairngorms housing market sub-area, for scenario 3 (Moray Council, Housing Needs and Demand Assessment, 2023).

Cairngorms housing market sub-area Scenario 3 (growth 0.25%)	2022 – 2041	
All-tenure housing figure	59	
Market per year	26	44%
- Private rented stock	10	17%
- Owner occupied	16	27%
Affordable per year	33	56%
- Social rent	25	42%
Newly forming households	4	
Existing Need	21	
- Below market	8	14%



Table 40 Ten-year scenario 3 (growth 0.25%) need and demand figures for the Cairngorms housing market sub-area adjusted to align with the Cairngorms National Park's timescales for the next local development plan (Moray Council, Housing Needs and Demand Assessment 2020).

Housing Need and Demand Assessment 2023 - 2028 Cairngorms housing market sub-area Growth scenario	Local development plan period 2027 – 2036	
All-tenure housing figure	30	
Market housing figure	13	44%
Affordable housing figure	17	56%

Moray Council Local Housing Strategy 2019 – 2024

Moray's current Local Housing Strategy was published in 2019 covering until 2024. It is based on the Moray Housing Need and Demand Assessment 2017. It targeted ten affordable homes between 2019 and 2024. Work on the next Strategy is ongoing while awaiting the adoption of the next Housing Needs and Demand Assessment.

Moray Council Strategic Housing Investment Plan 2024 / 2025 – 2028 / 2029

Published in November 2023, the investment plan, sets out the levels of affordable housing over the last five years. There were no affordable housing completions in the Cairngorms housing market area. However, 14 were completed on the former school site in Tomintoul after publication. The affordable housing supply programme 2024 / 2025 – 2028 / 2029 includes no sites in the Cairngorms housing market sub-area.

Moray Council Evidence Report – Moray Local Development Plan 2027

The evidence report explains that the local housing land requirement is based on the Housing Need and Demand Assessment growth scenario. The growth scenario responds to Moray's ambitious growth deal. This means that Moray's housing supply target for the 15-years from 2022 and 2037 is 5,732 dwellings. Taking account of housing completions in 2022 and 2023, the evidence report sets out that the Housing Land Requirement is 4,850 dwellings. In line with the Housing Need and Demand Assessment, the Cairngorms housing market area's proportion of this total is 1% - a housing land requirement of 48.5 dwellings between 2024 and 2037. This equates to 3.7 dwellings per year and 37 dwellings over the ten-year period of the Cairngorms Local Development Plan.

Note that the Moray evidence report does not take account of the Cairngorm housing market sub-area's specific completions or existing need and is a higher figure than the growth scenario figure for the Cairngorm housing market sub-area in the Housing Need



and Demand Assessment – which is 59 dwellings over 20-years, 44.25 over 15 years and 29.5 over ten-years.

The evidence report also lists an annual housing completion of 440 units (based on the growth scenario) and an 'annual effective housing land supply target' of 500 units. This would equate to fifty dwellings per year for the Cairngorms housing market sub-area, or five dwellings per year.

The evidence report identifies that no additional land is needed between 2024 – 2037. However, it is proposed to require further evidence and viability of sites as part of the ongoing plan preparation process. This could identify additional brownfield land designations and would review the indicative capacities of existing sites to reflect a significant increase in the number of small households and the need for single storey homes. In addition, sites could be removed as allocations if sufficient evidence of both the effectiveness and viability of sites is not forthcoming.

The evidence report highlights that the Housing Need and Demand Assessment estimates that 53% – 58% of housing estimates should be met by social housing, and a further 10% – 11% should be met by below market housing. However, it is proposed to continue with the current policy requirement for sites of four or more dwellings to provide 25% affordable units.

Moray Council summary and indicative housing land requirement



Table 41 summarises the housing evidence relevant to the local development plan period 2026 – 2037 for the Moray Council part of the Cairngorms National Park to derive an indicative housing land requirement. The key points are that:

- In their methodology, the Scottish Government identifies a default 10-year figure ten-year housing need figure for Moray Council of 27 dwellings (4% of the total for Cairngorms National Park). Taking account of the 30% flexibility allowance and rounding to arrive at 850 dwellings, the Moray Council part of the 10-year all-tenure minimum local housing requirement is 35 dwellings.
- The Housing Need and Demand Assessment estimates a 10-year all-tenure housing need of 29.5 (rounded to 30) dwellings between 2027 – 2036.
- The Moray Council evidence report identifies a local housing requirement for 2024 – 2037 of 48.5 dwellings (1% of the total) for the Cairngorms housing market sub-area. This equates to 37 dwellings over the ten-year period of the Cairngorms Local Development Plan. However, Moray Council's requirement is based on an affordable housing policy of 25% (Moray Council's current and proposed requirement). This would deliver nine affordable homes.
- Completions in the Moray Council part of the National Park averaged 2.3 dwellings per year between 2013 and 2023.
- The housing land audit 2023 indicates that there are 16 dwellings in the effective housing land supply up to 2030. These are the two allocated sites in Tomintoul.
- The evidence indicates that the Scottish Government's identified 10-year all-tenure minimum housing land requirement figure for Moray Council of 35 dwellings is ambitious and higher than the evidenced need.
- The affordable housing need identified in the Housing Need and Demand Assessment of 17 dwellings. An appropriate affordable housing requirement should be set on a settlement by settlement basis.
- In the absence of more recent evidence indicating that a higher requirement is necessary, it is proposed that the indicative local housing requirement should be based on the Scottish government's minimum all-tenure housing land requirement. This would achieve both the identified affordable housing need and market housing demand for 2027 – 2036.



Table 41 Summary of the housing evidence figures²³ relevant to the Moray Council part of the Cairngorms National Park, for the period of the local development plan 2027 – 2036. (Moray Council and Scottish Government).

All tenure	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	Total
Government minimum all-tenure housing land requirement (derived figure for Moray Council)	3	3	3	3	3	3	3	3	3	3	35
Housing Need and Demand Assessment 2023(Cairngorms sub-housing market area)	3	3	3	3	3	3	3	3	3	3	30

Market Housing	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	Total
Housing Need and Demand Assessment 2023 (Cairngorms sub-housing market area)	1	1	1	1	1	1	1	1	1	1	13

Affordable Housing	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	Total
75% of the Government minimum all-tenure housing land requirement (derived figure for Moray Council)	3	3	3	3	3	3	3	3	3	3	26
Housing Need and Demand Assessment 2023 (Cairngorms sub-housing market area)	2	2	2	2	2	2	2	2	2	2	17

²³ All figures founded to nearest whole number.



Perth and Kinross Council

Perth and Kinross Housing Market Partnership Housing Need and Demand Assessment Final Report, November 2022

Perth and Kinross Council is one of four housing market partners who have come together to produce the Tayside Housing Need and Demand Assessment. It was published in November 2022 and confirmed as robust and credible by the Centre for Housing Market Analysis on 9 May 2023.

The Perth and Kinross Council area includes six housing market areas, of which parts of the Highland Perthshire and Eastern (Strathmore and Glens) housing market areas are within the National Park.

Three baseline scenarios have been produced – ‘Principal’, ‘High Migration’ and ‘High Migration + Perth and Kinross Growth’. The ‘high migration’ scenario assumes 7% growth in Perth and Kinross over the next 25 years, while the ‘high migration plus Perth & Kinross growth’ scenario anticipates a higher rate of household migration of 13% (0.5% per annum) over the next 15 years – based on higher productivity rates than the rest of the region and likely job growth, which would enhance migration beyond the trend-based data.

However, in the Highland and Eastern housing market areas, this growth would be driven by the settlements of Pitlochry, Aberfeldy and Dunkeld/Birnam (Highland Perthshire) and Blairgowrie, Alyth and Coupar Angus (Eastern). Hence, the majority (if not all) of the growth in Perth and Kinross will be outwith the National Park. The Housing Needs and Demand Assessment guidance requires information to be gathered and analysed at a functional housing market area level.

The settlements of Blair Athol and Calvine are within the Highland Perthshire housing market area. Highland Perthshire has approximately 8% of the population of Perth and Kinross, but the population of Highland Perthshire which is also in the Cairngorms National Park is also only around 8%. This means that the population of Perth and Kinross which is in the National Park is around 0.06% of the population.

The Housing Needs and Demand Assessment’s growth scenario estimates a housing requirement over the 20-year period 2021 – 2040 of 10,205 dwellings. This is set out in Table 42. In the first-five years, an existing housing need of 1,328 dwellings is included. This creates a tenure split of 47% market housing and 53% affordable housing. The affordable housing need is then less (because the existing need has been satisfied), in subsequent five-year periods to 33%, then 30%, then 28%. The five-year period



estimates also show that the rate of household growth reduces over the twenty-year period.

Table 42 Additional housing units needed, for each five-year band, in the Perthshire and Kinross housing market areas for scenario 3 (growth) (Perth and Kinross Council, Housing Needs and Demand Assessment, 2022).

Perth and Kinross housing market areas	2021 – 2025		2026 – 2030		2031 – 2035		2036 – 2040	
Scenario 3 (growth)								
All-tenure housing figure	4,742		2,708		2,279		867	
Market per year	2,221	47%	1,826	67%	1,600	70%	627	72%
- Private rented stock	1,129		920	34%	813	36%	314	36%
- Owner occupied	1,092		906	33%	787	34%	313	36%
Affordable per year²⁴	2,520	53%	882	33%	679	30%	240	28%
- Social rent	1,882	40%	393	15%	306	14%	107	12%
- Below market	639	13%	489	18%	373	16%	133	15%

The extrapolated figures for the Cairngorms National Park part (0.06% of the overall population) of the Perth and Kinross housing market areas are set out in Table 43 for the Local Development Plan period (2027 – 2036). Note that this therefore doesn't include the higher affordable housing need in years 2021 – 2025.

Table 43 Ten-year scenario 3 (growth) need and demand figures for the Cairngorms National Park part (based on population) of the Perth and Kinross housing market areas, adjusted to align with the Cairngorms National Park's timescales for the next local development plan (Perth and Kinross Council, Housing Needs and Demand Assessment 2022).

Housing Need and Demand Assessment 2022 Perth and Kinross housing market sub-area Growth scenario (population-based proportion – 0.06%)	Local development plan period 2027 – 2036	
All-tenure housing figure	30.3	
Market housing figure	20.9	69%
Affordable housing figure	9.4	31%

²⁴ Includes existing need for 1,328 dwellings in 2021 – 2025.



Perth and Kinross Local Housing Strategy 2022 – 2027

The strategy spans a five-year period from 2022 up to 2027. It was formally published in March 2023 (due to admin delays) but has been in place since 2022 and covers all work up to March 2027.

The strategy favours the Housing Need and Demand Assessment's growth scenario. It sets an annual Housing Supply Target of 654 dwellings per year, with a target for 32% affordable housing (210 dwellings). This is a 40% increase on the affordable housing target in the Local Housing Strategy 2016 – 2021 and meets the Council's key priorities to provide more affordable homes, in the right place at the right cost. Of the 210 affordable homes, 131 of the affordable houses would be social rent and 79 affordable houses below market.

The Local Housing Strategy advises that further analysis and research will be undertaken to disaggregate the Housing Supply Target by housing market sub-area.

The Local Housing Strategy's Appendix sets out the rationale for the Housing Supply Target. It explains that the affordable housing figures derived by the Housing Need and Assessment's growth scenario for the first five-year period are not achievable given the limited availability of Scottish Government funding and the land supply needed. It proposes to deliver the affordable housing component over a 20-year period. This includes addressing the backlog of existing need over the full twenty-year period rather than the first five years as assumed in the Housing Need and Demand Assessment.

The overall Housing Supply Target compared to Housing Need and Demand Assessment estimates are set out in Table 44.



Table 44 Annualised housing supply target derivation for Perth and Kinross Housing Market Areas (Perth and Kinross Council, Local Housing Strategy 2022 – 2027 Appendix: Housing Supply Targets 2022+).

Perth and Kinross housing market areas	Housing Need and Demand (2021 – 2025 five-year period) (annualised)		Housing Need and Demand (2021 – 2040 twenty-year period) (annualised)		Housing Supply Target (2022 – 2027) (annualised)	
All tenure housing	948		510		654	
Market housing	444	47%	300	59%	444	68%
Owner-occupied	226				218	33%
Private rent	218				226	35%
Affordable housing	504	53%	210	41%	210	32%
Social rent			131		131	20%
Below market			79		79	12%

Table 45 Annual housing supply target 2022 – 2027 for the Cairngorms National Park part of the Perth and Kinross Housing Market Areas (Perth and Kinross Council, Local Housing Strategy 2022 – 2027 Appendix: Housing Supply Targets 2022+).

Cairngorms National Park derived housing supply target (population-based proportion – 0.06%)	Housing Need and Demand (2021 – 2025 five-year period) (annualised)		Housing Need and Demand (2021 – 2040 twenty-year period) (annualised)		Housing Supply Target (2022 – 2027) (annualised)	
All tenure housing	6.2		3.3		4.3	
Market housing	2.9	47%	1.9	58%	2.9	68%
Owner-occupied	1.4				1.4	33%
Private rent	1.5				1.5	35%
Affordable housing	3.3	53%	1.4	42%	1.4	32%
Social rent			0.9		0.9	20%
Below market			0.5		0.5	12%



Perth and Kinross Council Strategic Housing Investment Plan 2025 / 2026 – 2029 / 2030

The investment plan aligns with the outcomes set out in the Local Housing Strategy 2022 – 2027. The plan's programme seeks to deliver 1,152 dwellings (230 dwellings per year) on defined project sites over the five years of the plan. This is above the Local Housing Strategy target of 210 new affordable homes. Delivery is subject to restoration of funding through the Scottish Government's Resource Planning Assumption for Perth and Kinross to pre-cut levels. There are no sites within Cairngorms National Park.

Perth and Kinross Council Housing Evidence Topic Paper No. 020, July 2024

The paper summarises the key information about housing in Perth and Kinross. It concludes that the local issues identified were already considered in the identification of the Scottish Government's minimum all tenure housing land requirement (8,500 dwellings over ten years) and that there is no individual factor or clear piece of evidence which justifies increasing indicative housing land requirement beyond this figure.

Nevertheless, the topic paper proposes two options – option 1 which proposes no increase on the minimum all tenure housing land requirement and option 2 which increases the housing land requirement to 10,000 dwellings. The topic paper states that this is an arbitrary figure for which there is no specific evidence. However, it reflects the higher figure set by the previous Strategic Development Plan for Perth and Kinross and which was previously considered a realistic option, albeit that the rate of housing completions required (1,000 dwellings per year) was never achieved.

There is no reference to the Cairngorms National Park in the evidence report.

Housing Needs Survey Report for Blair Atholl and Struan Community Council (November 2024)

This survey and report, by the Communities Housing Trust, offers a snapshot of housing need at the time of publication. 57 resident households responded as well as 17 people who did not live in the area, but wanted to. The results show that there is a need for affordable homes for existing residents, home leavers and businesses. The report concludes that a community-led project could be considered in the locality, where communities have more control over who will be offered a home.

Based on the evidence provided by respondents, the report recommends the provision of up to 20 homes in the Blair Atholl and Struan Community Council area. It also advises that, subject to funding conditions, there may also be an option, where open market housing can be provided, of reinvesting the surplus from these sales as a cross-subsidy



to help finance affordable housing developments – either as part of the same project or elsewhere.

A broad range of housing tenures are recommended, with a mix of two and three-bedroom low-cost rental and purchasing options, to help to encourage more collaborative partnership working and inward investment opportunities. It advises that this in turn will help to support the existing local economies, services, infrastructure and businesses to be more sustainable, thereby enhancing the opportunities for growth.

Perth and Kinross Council summary and indicative housing land requirement

Table 46 summarises the housing evidence relevant to the local development plan period 2026 – 2037 for the Perth and Kinross Council part of the Cairngorms National Park in order to derive an indicative housing land requirement. The key points are that:

- In their methodology, the Scottish Government does not identify a default 10-year figure ten-year housing need figure for the Perth and Kinross Council. Part of Cairngorms National Park. However, the evidence below indicates that there is a need and demand for new housing.
- The Housing Need and Demand Assessment estimates a 10-year all-tenure housing need of 30.3 (rounded to 30) dwellings between 2027 – 2036. Note that this does not include the first five-year period (2021 – 2025) of the Housing Need and Demand Assessment which includes the identified existing affordable housing need. For this period, 53% of all-tenure housing needs to be in the form of affordable housing.
- The Local Housing Strategy 2022 – 2027 sets a housing supply target which aims to deliver the market housing identified in the first five-year period, but the affordable housing averaged over twenty-years (including existing need). This is because it is not considered realistic to achieve the affordable housing need identified in the first five-years. From this a twenty-year (2022 – 2041) affordable housing target of 1.4 dwellings per year can be derived for the Cairngorms National Park part of Perth and Kinross Council.
- Completions in the Perth and Kinross part of the National Park averaged 1.7 dwellings per year between 2013 and 2023.
- The Housing Needs Survey Report for Blair Atholl and Struan Community Council indicates a current need for up to 20 dwellings and a mix of low cost home ownership, rental and open market homes.
- The housing land audit 2023 indicates that there are 29 dwellings in the effective housing land supply up to 2030. This includes part of the sites identified in Blair Athol and Calvine in the Local Development Plan 2021.



- The affordable housing need identified in the Housing Need and Demand Assessment is 9 dwellings. An appropriate affordable housing requirement should be set on a settlement by settlement basis.
- Based on the evidence, an all-tenure housing land requirement figure of 39 dwellings for the Perth and Kinross Council part of the Cairngorms National Park would achieve both the identified affordable housing need and market housing demand for 2027 – 2036. This has been calculated by adding 30% flexibility to the Housing Need and Demand Assessment 10-year all-tenure housing need estimate of 30.3 (rounded to 30).

Table 46 Summary of the housing evidence figures²⁵ relevant to the Perth and Kinross Council part of the Cairngorms National Park, for the period of the local development plan 2027 – 2036. (Perth and Kinross Council and Scottish Government).

All tenure	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	Total
Housing Need and Demand Assessment 2021 (0.06% of the Perth and Kinross housing market areas)	4	4	4	4	3	3	3	3	3	1	30

Market Housing	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	Total
Housing Need and Demand Assessment 2021 (0.06% of the Perth and Kinross housing market areas)	2	2	2	2	2	2	2	2	2	1	21

Affordable Housing	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	Total
Housing Need and Demand Assessment 2021 (0.06% of the Perth and Kinross housing market areas)	1	1	1	1	1	1	1	1	1	0	9

²⁵ All figures founded to nearest whole number.



Angus Council

Angus Council is one of four housing market partners who have come together to produce the Tayside Housing Need and Demand Assessment. It was published in November 2022. There are four market areas. The West Angus Housing Market Area includes the settlements of Forfar, Kirriemuir and Letham and stretches north to include the Angus Glens (Glen Esk, Glen Clova, Glen Prosen and Glen Isla). There are only 42 dwellings in the Angus area of the National Park, which lead the Council's housing market analysis to conclude that house buyers from the Cairngorms National Park have no influence on the operation of the West Angus Housing Market Area (which contains the settlements of Kirriemuir and Forfar), or any other housing market areas in Angus.

No quantitative conclusions relating to the National Park can be drawn from the housing need and demand assessment, therefore in this area the Park Authority must take into account any other information available to determine the needed land supply. Given the extremely small size of the population and the number of households within the area, it is clear that a quantitative analysis of need is not possible.

In addition, the area's relative geographical isolation to the rest of the National Park, means that this population is unlikely to generate any demonstrable housing need and demand that needs to be met at a strategic level. Therefore, a policy-based approach to housing provision is considered to be the most robust option within the area, with no overall level of housing set and applications considered on a case by case basis. Under such circumstances, the onus would be on the applicant to demonstrate need, just as would be the case in any other out of settlement locations within the National Park. This area can therefore be excluded from consideration in the overall assessment of housing need and demand.

Cairngorms National Park residents and workers survey 2024 – 2025

In addition to the local authority data, evidence of need can also be drawn from the Cairngorms National Park resident and worker survey 2024 – 2025. While this data cannot be used to quantify need in terms of the housing land requirement, it does highlight the experiences, including barriers to finding affordable housing, of those living and working in the National Park.

The research was conducted by M·E·L Research's using their online survey platform. The survey was open from 17 July 2024 until 31 January 2025. In total, 1,294 responses were received from residents living within the National Park (either as their primary residence, or one of two or more residences, excluding holiday homes), and 63 were



received from those who live outside of the National Park. The profile of respondents was broadly similar to that taken from the 2022 Census in terms of area lived in, age, ethnicity, sex and gender, and health conditions and caring responsibilities.

Relevant findings are summarised below:

- 60% of residents surveyed reported that they had found it difficult to find an affordable place to live in the Cairngorms National Park, with 28% saying that it was very hard. A higher percentage of younger resident sub-groups reported finding it difficult, as follows (percentage who found it difficult in brackets): those aged 16 to 34 (77%), 35 to 44 (78%) and 45 to 54 (71%), compared to those aged 55 to 64 (55%) and 65+ (42%). By gender, a greater percentage of female residents found it difficult (64%) compared to male (54%) residents.
- Among those living outside the National Park, but working within it, 50% cited the difficulty of finding affordable housing as a reason (although note that this was a small sample size and that 25% stated that they hadn't looked or were not interested in living within the National Park).
- One third (32%) of residents surveyed, indicated that they would like to move home in the next few years ('in next 2 years' and 'in next 3+ years'). This compares to 21% of residents across Scotland (as found in the Scottish household survey 2023).
- 63% of residents who would like to move identified low supply of housing ('not available or limited supply where I want or have to live') as a barrier preventing them from moving into their most preferred accommodation. This compares with only 12% who stated this was the case in the Scottish household survey 2023. In addition, only 18% of National Park residents identified being unable to raise a sufficient deposit as a barrier, compared to 43% in the Scottish household survey. Both these answers suggest that low supply is the primary barrier within the Cairngorms National Park.

The results of the survey may be viewed in full, here:

- <https://cairngorms.co.uk/document-collection/resident-and-worker-survey-results-2024-25>

Affordable housing viability

To inform the local development plan's affordable housing requirements, the District Valuer Service have been commissioned to undertake assessments of viability of both delivering affordable housing on development sites and commuted sums.



Valuation Report for: Housing sites within Cairngorms National Park (October 2024)

This report explores the effect that increasing affordable housing contributions in the Cairngorms National Park to align with Objective C2 of the Cairngorms National Park Partnership Plan would have on development viability.

The external valuer has carried out a valuation of six sites in the Cairngorms National Park. These vary in location and size and are all allocations that were proposed within the draft version of the current Local Development Plan. Only one of the sites has an extant planning permission and so hypothetical development scenarios have been adopted.

Two individual residual valuations have been undertaken for each site. The first considers the current Local Development Plan Policy 1.5 affordable housing requirement (either 25 or 45% of the total number of dwellings on the site) and the second valuation considers the requirement for 75% affordable housing.

Gross development values have been calculated for the market housing element of each development, by anticipating the sale prices of completed homes based on house sales in the locality of the site and further afield.

Development costs for the market housing element have then been calculated and this all-cost total is deducted from the gross development value. The all-cost total includes estimated build costs (based on Building Cost Information Service construction data); external works costs (20% of gross development value); contingencies (5%); professional fees (6%), agents and legal selling costs; land acquisition costs; finance costs (8.5%); and profit (20%).

A similar exercise was carried out for the affordable housing element, with gross development value calculated based on available grant funding and rental income. Development costs were calculated in a similar way as above, but with higher build costs and an assumed 6% profit level.

The residual values calculated under the current policy requirement for either 25% or 45% affordable housing support land values ranging from £92,021 to £252,000 an acre. This compares well with expected land values for medium sized sites which are in the region of £100,000 to £150,000 an acre. With a 75% affordable housing requirement, while developments would be viable (in that they are calculated to procure a return to a



developer within the expected range), land values are diminished considerably, with land values calculated at around £40,000 to £50,000 an acre. The external valuer advises that, while the value would be higher than agricultural value, there is a 'high probability that landowners will be less likely to release land in the short term at least'.

The report does advise that, over time, there may be a correction in the market and sites will start being released, albeit for a lower return for the landowner. In conclusion, the external valuer advises that 75% affordable housing might be aspirational and 50% might be a more realistic figure that balances the requirement for affordable housing against landowner expectations.

The report and its appendices may be viewed here:

- <https://cairngorms.co.uk/uploads/documents/Local-Development-Plan-Evidence-Report/Supporting-Documents/Cairngorms-National-Park-Affordable-housing-viability-report-2024.zip>

Valuation Report for Cairngorms National Park Authority: Affordable Housing Land / Commuted Sum Valuations (August 2024)

This report updates previous valuation advice (November 2020) in relation to commuted sum payments, which is defined as a 'financial contribution to affordable housing'.

The same benchmark approach and assumptions have been made, with the valuation based on a single development plot, with services located close-by, for the erection of a standard new build four apartment / three-bedroom detached house of approximately 96sqm (gross internal value) with private garden, off-street parking, but no garage. This methodology is in line with the Royal Institute of Chartered Surveyors Professional Standard.

The external valuer has calculated a private housing plot value for each of the five constituent local authority areas within the National Park. The calculated value is considered to reflect the amount the housing association or local authority would have to pay over and above the affordable housing land value to obtain the alternative plot (Table 47). The commuted payments are slightly higher than the 2020 valuations.



Table 47 Benchmark commuted sum payment values as at 9 August 2024.

Local authority area	Affordable housing plot value	Private housing plot value	Commuted payment
Aberdeenshire	£0	£35,000	£35,000
Angus	£0	18,250	18,250
Highland	£0	21,500	21,500
Moray	£0	£19,500	£19,500
Perth and Kinross	£0	£33,500	£33,500
Cairngorms National Park (average of five local authorities)	£0	£25,500	£25,500

The report may be viewed here:

- <https://cairngorms.co.uk/uploads/documents/Local-Development-Plan-Evidence-Report/Supporting-Documents/Cairngorms-National-Park-Commuted-sums-report-2024-redacted.pdf>

In the adopted Local Development Plan, Policy 1.5 requires proposals for fewer than four market dwellings to make a contribution towards affordable housing. The level of contribution is set out in the Cairngorms National Park's Housing Supplementary Guidance and has been set at 10% of the full market cost of delivering affordable housing. The Proposed Plan will need to consider the thresholds for commuted sums as well as the value of the commuted sum to be levied.

Other sources of information

Existing Housing Need in Scotland, Homes for Scotland, 2024

This report, published in January 2024, commissioned by Homes for Scotland and written by The Diffley Partnership and Rettie and Co aims to assist planning authorities with the evidence gathering process. It seeks to understand housing need across Scotland, as well as at individual local authority level where possible. It uses a broader definition of existing household need than that currently used by default within the Housing Need and Demand Assessment (that relate to homeless households in temporary accommodation; and overcrowded households that include at least one concealed family).

A survey of 13,690 Scottish households was conducted which found that 28% of Scottish households currently have some form of housing need. A significant proportion can afford market housing, but, when combined with secondary data analysis, the



report estimates that 330,000 households require affordable housing (i.e. are in net household need and represent a backlog that need an affordable housing solution). This is significantly higher than the figure of just under 31,000 (based on those living in temporary accommodation or in concealed and overcrowded households) captured by the Scottish Government definitions and the report states that their survey demonstrates that levels of existing housing need are more complex and much higher than is currently accounted for through the Housing Need and Demand Assessment tool.

The report does not contain any information directly relating to the Cairngorms National Park. Furthermore, as set out in Stirling Council's Evidence Report, under Topic Paper 10, pages 104 to 107, there are multiple failings in Home's for Scotland's evidence. The Reporter assigned to the gatecheck on Stirling Council's evidence report also concluded that Home's for Scotland's evidence 'cannot be taken to override other evidence or assume additional weight to fill the gap left by [Stirling Council's] expired housing need and demand assessment. Therefore, the Park Authority does not consider that the Proposed Plan can draw any implications from the Homes for Scotland Report referenced in this topic paper.

Conclusions: Local Housing Land Requirement

The Cairngorms National Park is only covered by two housing market areas that may be regarded as contiguous with its boundary, namely Badenoch and Strathspey housing market area in Highland Council and Cairngorms housing market area in Moray Council. Four other housing market areas, namely Aberdeenshire's Rural Housing Market Area, Perth and Kinross' Highland Housing Market Area and Eastern (Strathmore and the Glens) Housing Market Areas and Angus' West Housing Market Area, include areas of the National Park, but their functional market areas are mostly located in settlements outwith the National Park's boundary (Figure 36).

Evidence made available since the publication of the Government's Minimum All-Tenure Housing Land Requirement consists of each constituent authority's housing need and demand assessments, local housing strategies and housing supply targets.

In broad terms, the housing supply targets of local housing strategies' increase the relevant housing need and demand assessment figures to take account of planned economic growth, affordable housing pressures and the impact of second homes of housing stock. However, except for Aberdeenshire Council, the housing supply targets



cover a five-year period and do not provide housing figures for the 10-years of the next Cairngorms National Park Local Development Plan.

Table 48 brings together and summarises the assessment of housing need and demand within these areas as pertains to the Cairngorms National Park, according to the following sources of evidence:

- The 'default 10-year figures' for each local authority from Annex J of the Scottish Government minimum all-tenure housing land requirement methodology paper.
- Each constituent local authority's Housing Need and Demand Assessment.
- Housing completions over the last ten years.
- The adopted local development plan 2021 housing land requirement for the ten-year period from 2020 to 2029.
- The ten-year all-tenure housing land requirements set by the Scottish Government's Minimum All-Tenure Housing Land Requirement.

The table highlights that the Scottish Government's Minimum All-Tenure Housing Land Requirement for the Cairngorms National Park (850 dwellings) is higher than the evidenced total need and demand for housing as set out in the local housing authorities' housing need and demand assessments (486 dwellings).

The Government's Minimum All-Tenure Housing Land Requirement is also broadly in line with completions over the past ten years (845 dwellings) and the Cairngorms National Park's planned for growth to 2029 (819 Dwellings), as set out within the adopted Cairngorms National Park Local Development Plan 2021.

Assessing the figures at a local authority level, the 'default 10-year figures' for each local authority stated in Annex J of the Scottish Government minimum all-tenure housing land requirement methodology paper are higher than the evidenced need and demand figures, with the exceptions of Moray Council and Perth and Kinross Council. In Moray Council, the evidenced need is 30 dwellings, and the default 10-year figure is 27 dwellings.

For Perth and Kinross Council, the Scottish Government's minimum all-tenure housing land requirement methodology paper advised that the data zones involved are mainly on the Council side of the border and no figure was derived for the Cairngorms National Park part. However, this part of the National Park includes the intermediate settlement of Blair Atholl and it is important that a local housing land requirement is set for this area. The Housing Need and Demand Assessment 2022 indicates a need for 30 dwellings. With a 30% flexibility allowance, this figure would be 39 dwellings.



Table 48 Summary of alternative all-tenure housing figures for the Cairngorms National Park (Scottish Government, local authorities' assessments).

Source of information	Highland	Aberdeenshire	Angus	Moray	Perth and Kinross	Cairngorms National Park Authority Total
Scottish Government 10-year default figures ²⁶	514	135	0	27	0	676
Housing Need and Demand Assessments ²⁷	366	62	0	30	30	488
Local Development Plan 2021 ²⁸ (2020 – 2029 figures)	580	137	0	54	48	819
Completions 2013 – 2023	688	117	0	23	17	845
Minimum All-tenure housing land requirement ²⁹	646	170	0	34	0	850

This means that there is no evidence that the Cairngorms National Park Authority should set a higher local housing requirement and shows that the government derived figure is already ambitious, particularly given the National Park's statutory aims to conserve and enhance the natural and cultural heritage of the area, to promote sustainable use of the natural resources of the area, and to promote understanding and enjoyment (including enjoyment in the form of recreation) of the special qualities of the area by the public.

It is proposed that the indicative local housing requirement should be based on the Scottish government's minimum all-tenure housing land requirement (850 dwellings), with a figure for Perth and Kinross Council area added, based on evidenced need. As set

²⁶ Scottish Government 10-year default figure as published in Annex J of the Scottish Government minimum all-tenure housing land requirement methodology, 2021.

²⁷ Figures derived from each constituent authority's Housing Need and Demand Assessment, aligned to the new local development plan ten-year period of 2027 - 2037 and based on their preferred projection scenario.

²⁸ Housing Land Requirement figures, based on a generosity level of 10% above the housing supply target.

²⁹ Scottish Government minimum all-tenure housing land requirement, broken down into market areas based on the proportional distribution set out in Annex J of the Method Paper, February 2021.



out in Table 49, this sets an indicative local housing land requirement of 889 dwellings, this is 4% (39 dwellings) higher than the Minimum all-tenure housing land requirement.

Table 49 Indicative Housing Land Requirement based on the government's minimum all-tenure housing land requirement.

Local Authority	Local development plan period 2027 - 2036
Highland Council	645 dwellings
Aberdeenshire Council	170 dwellings
Moray Council	35 dwellings
Perth and Kinross Council	39 dwellings
Total	889 dwellings

While the affordable housing need within the National Park is very high, the National Park already successfully seeks 45% affordable housing provision on new development in its larger settlements and the Partnership Plan targets that 75% of new housing is for social rental, mid-market rental or other affordable categories that provide affordability in perpetuity. This includes using the next local development plan to identify further locations where more than 25% affordable housing is required.

External valuer advice from the Valuation Office Agency's Development Valuation Service, which tests a range of development site scenarios in the Cairngorms National Park, is that, with a policy requirement for 75% of new housing to be provided as affordable housing on each development, while the value would be higher than agricultural value, there is a 'high probability that landowners will be less likely to release land in the short term at least'. The external valuer advises that 75% affordable housing might be aspirational and 50% might be a more realistic figure that balances the requirement for affordable housing against landowner expectations.

Meeting the 75% Partnership Plan target will require a range of initiatives, including an achievable planning policy requirement for affordable housing and direct investment in the delivery of affordable housing.



Specialist housing needs

This section covers matters relating to the following types of need:

- Gypsy and Travellers (page 139)
- Older people and disabled people (page 145)
- People in further and higher education (page 148).

Gypsy and Travellers

The Scottish government committed to a 10-point action plan to ensure that Gypsy / Travellers have a stronger voice in guiding the future development of their places. This includes reviewing the role of the Housing Need and Demand Assessments; updating Gypsy / Traveller Scottish government planning guidance; and amending the Planning Bill to ensure that planning authorities properly involve Gypsy / Travellers in planning the future of their places.

The Scottish government ran a consultation 'local development plan evidence report – defining Gypsy and Travellers' from December 2022 to February 2023 and published an analysis of responses received on 24 March 2024. No further documents have been published.

Section 16B(4)(a)(ii) of The Town and Country Planning Act (Scotland) 1997 (as amended) requires the local development evidence report to state the steps taken to seek the views of the public at large, including Gypsies and Travellers. In addition, section 16B(3)(c)(i) and (ii) requires the local development evidence report to summarise the actions taken by the planning authority to meet the accommodation needs of Gypsies and Travellers and an analysis of the extent to which the action has helped to meet those needs.

Local Development Plan Policy 1.10, adopted in March 2021, supports proposals for the development of sites for Gypsies, Travellers and Travelling Show People, where the need and location has been identified in the relevant Local Authority Housing Strategy.

The Cairngorms National Park Authority engaged the services of Conyach to carry out engagement with the Gypsy / Traveller communities living within the National Park (Figure 37). The work was undertaken in the winter and spring of 2023 – 2024. The engagement explored the needs and aspirations of the community and heard the wisdom and experience already within it. The number of Gypsy and Travellers living in the Cairngorms National Park, either permanently or temporarily, is difficult to estimate with the 2022 Census estimating a population of just six individuals. However, this



estimate is unlikely to be representative of the true picture, with a total of 76 people identifying as Gypsy / Travellers engaged through this project.

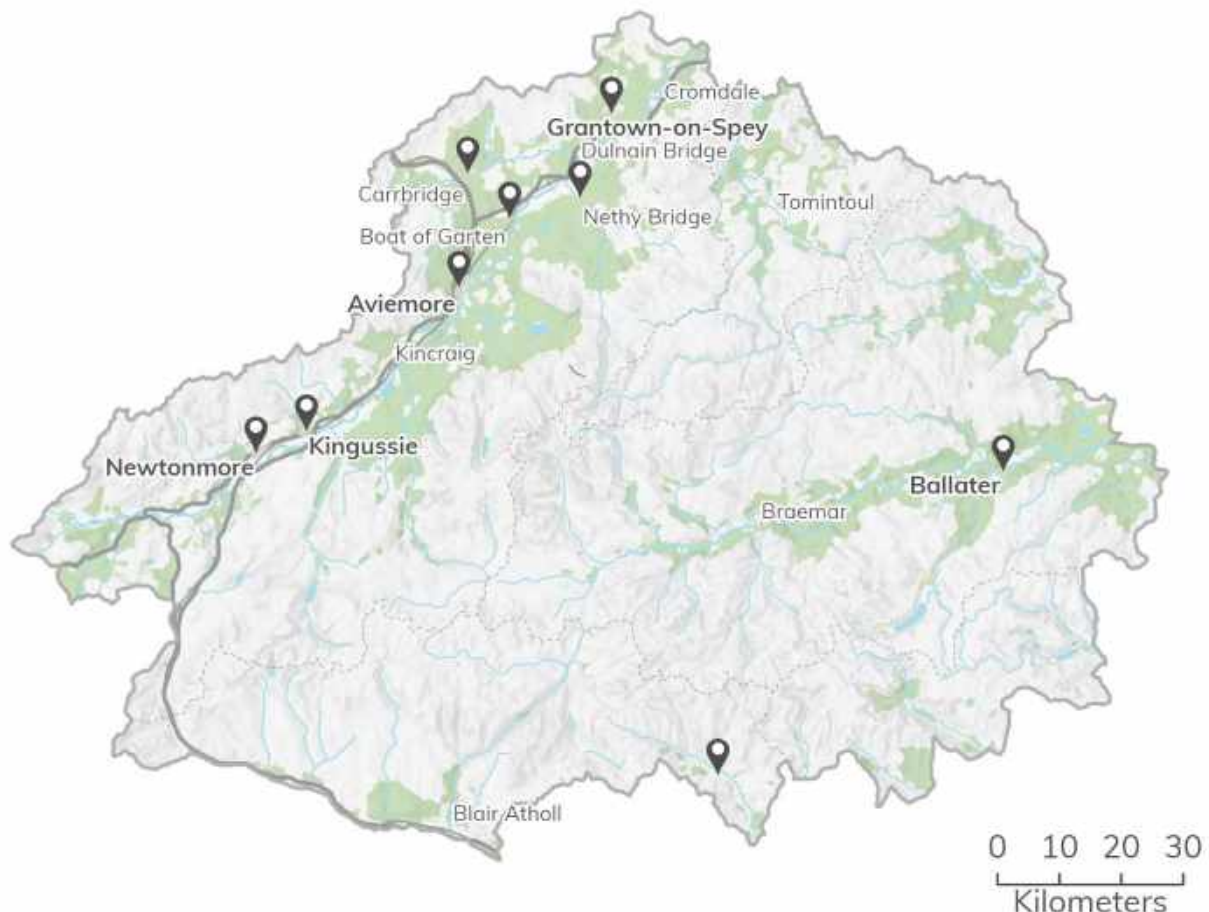


Figure 37 Localities where Gypsy and Traveller communities engaged with by the Park Authority are based. Reproduced by permission of Ordnance Survey on behalf of His Majesty's Stationery Office. © Crown copyright and database right 2025. All rights reserved. Ordnance Survey Licence number AC0000821810, Cairngorms National Park Authority.

The Place Standard approach to community workshops was used to generate a rich conversation in relation to social issues as well as spatial. It highlighted that Gypsy / Travellers feel safe and have a strong sense of identify and belonging within the Cairngorm National Park as well as good access to nature facilities and services. Less strongly, issues were identified with the spatial components of moving around, public transport, influence and sense of control, housing and community, and play and recreation.

Many spoke of family connections in the Cairngorms National Park going back generations and a strong sense of belonging due to a presence in the area for centuries.



There is a community heritage related to ancestral camps in the National Park passed on through the intergenerational nature of learning and the ancestry of creativity.

The three themes of National Planning Framework 4 – sustainable places, liveable places and productive places – were utilised to generate thoughts, actions and recommendations. The outcomes are summarised as follows:

Sustainable Places

- The communities felt that more needs to be done to highlight their culture and heritage in the area, including development of a heritage centre in the east of the national park and increased communication to protect and highlight areas of oral heritage – particularly ancestral stopping places – from development.
- The communities expressed frustration at the lack of access to waste recycling, public toilets and portaloos on the road.
- It was suggested that renewable energy stations could be provided at stopping places, reducing the need for petrol generators and that public transport could be better connected.

Liveable Places

- There is a lack of entertainment for young people and affordable shopping. There could be more inclusive funding for development of community-based facilities such as community gardens and play spaces.
- Safe camping places are becoming harder to find and new development is pushing Gypsy / Traveller communities to the margins. Gypsy / Traveller stopping places could be included within each new housing development.
- No specific need for new permanent accommodation was identified, instead there was a desire for more consideration through the planning process for travelling routes, including the protection of culturally and historically important stopping sites from development.

Productive Places

- Accessing employment can be difficult due to distances between Gypsy/ Travellers sites and towns and villages.

The engagement included a workshop focussed on designing the perfect camp. This responded to a suggestion that each new housing development should include a stopping place for the Gypsy / Traveller community. This would provide safe places, close to facilities and services that would enable young Gypsy / Travellers to travel and continue to experience their culture, traditions and history.



The full engagement report may be viewed here:

- <https://cairngorms.co.uk/uploads/documents/Local-Development-Plan-Evidence-Report/Supporting-Documents/Cairngorms-National-Park-Gypsy-Traveller-Community-Engagement-2024.pdf>

Local authorities' data

The five constituent local authorities have considered the needs of Gypsies and Travellers in their geographical areas, including within the Cairngorms National Park. These documents are summarised below.

Highland

The Housing Needs and Demand Assessment states that the Highland Council owns and manages four Gypsy / Traveller sites, with a total capacity of 47 pitches. One of the sites – Laggan Park (6 pitches) is in the Cairngorms National Park. In recent years, on average 41 roadside camps are reported to the council. Most temporary camps are reported in a cluster of locations around Inverness and Nairn, the Black Isle and south-eastern Ross-shire.

Highland Council's Local Housing Strategy (2023) identifies the action to 'work with Gypsy / Traveller community members to have a better understanding of their accommodation needs and preferences and explore and develop workable solutions'. Identified milestones to achieve this are:

- Continue to develop engagement opportunities with Gypsy / Traveller community to assess housing and support needs.
- Organise engagement events/surveys per annum.
- Deliver improvement works to council owned sites.
- Pilot delivery of proposed solutions where feasible such as negotiated stopping.
- Develop and implement gypsy / traveller action plan.

The Strategic Housing Investment Programme acknowledges the ongoing need and demand for appropriate accommodation and facilities to meet the needs of the Gypsy / Traveller community. Part of this includes identifying options to improve Highland Council sites, including Laggan Park, Newtonmore which lies within the National Park.



Aberdeenshire

Aberdeen City Council and Aberdeenshire Council published the Grampian Regional Equalities Council Research Paper: Accommodation Needs of Ethnic Minorities, Gypsy / Travellers and Travelling Showpeople in 2022. This summarises and takes account of earlier studies such as the Aberdeenshire Gypsy/Traveller Site Provision Strategy 2021 2026 and proposals in the Aberdeenshire local development plan 2017.

The paper explains that Aberdeenshire Council currently provides two public sites. Both sites have consistently high occupancy levels. It recommends that Aberdeenshire Council should prioritise development of four new sites in its future accommodation provision (as identified in the local development plan 2017); with a focus on a site in Buchan and a site from which the city is more easily accessible (Inverurie was suggested as a suitable location).

There were 17 unauthorised encampments in Aberdeenshire in 2021, up from just five the previous year as the pandemic restricted movement among the community. The paper advises that while there is a spread of encampments across five of the six administrative areas within Aberdeenshire, the majority of unauthorised camps have been in the Buchan area and overall, unauthorised encampments by area reflect the movement patterns of Gypsy / Traveller communities along the A90, A93, A96 and A947. No reference is made to the Cairngorms National Park area.

The Aberdeenshire Housing Need Demand Assessment 3: 2023 - 2028 explains that Aberdeenshire's local development plan 2023 identifies three potential areas for new sites (two halting and one transit), but notes that as the land is privately owned, the build-out rate is dependent on private developers and is unlikely to meet any identified need in the short term.

Angus

The Angus Housing Market Partnership's 2021 Tayside Housing Need & Demand Assessment advises that the 2016 Tayplan concluded that over a five-year period, there was a -7 to -15 shortfall in Gypsy / Traveller site pitches. The Strategic Housing Investment Plan advises, in paragraph 3.14, that the housing need and accommodation of Gypsy / Traveller communities will be closely monitored and opportunities to improve and extend existing provision will be considered.



Moray

The 2023 Housing Need and Demand Assessment advises that Moray does not have any permanent, temporary or halting sites for Gypsy / Travellers. There were 13 unauthorised encampments across Moray in 2022. There has been a declining number of encampments from a peak of 58 in 2013.

The 'Accommodation Needs of Gypsy / Travellers and Travelling Showpeople' research study was undertaken in 2023. It advised that there is an estimated need for one or two public sites offering a combined occupancy (permanent and temporary) of 15-20 pitches. Buckie and Elgin should be prioritised for site development. The study contains no discussion on the need for sites in the Cairngorm National Park area.

Perth and Kinross

Gypsy / Traveller accommodation needs are considered in the Perth and Kinross Housing Market Partnership Tayside Housing Need & Demand Assessment 2022. Core Output 3: Specialist Housing Provision states that in 2016 there was projected to be a - 2 shortfall to a 4 surplus in Gypsy / Traveller site pitches over the next five years. Page 57 of the Housing Needs and Demand Assessment advises that 'Tayside partners are committed to using the evidence provided in Housing Needs and Demand Assessment Core Output 3 as a starting point to robustly evidence future requirements for each form of specialist provision within the development and delivery of their future Local Housing Strategies'.

The Perth and Kinross Local Housing Strategy 2023 commits to consulting with Gypsy / Travellers to understand their long-term needs and preferences in more detail, with a view to updating the Gypsy / Traveller Action Plan. The Perth and Kinross Council housing topic paper (April 2024) notes that the accommodation needs of Gypsy / Travellers and Travelling Showpeople is in need of updating and that an updated needs assessment is programmed to be carried out in 2025 / 26.

Conclusion

Because neither the engagement with Gypsy and Travellers nor the local authority need assessments identified a specific need for new permanent accommodation within the Cairngorms National Park, it is unlikely that the proposed plan will need to allocate land for such a purpose and a policy approach is likely to be the best way of meeting Gypsy and Traveller need. The Park Authority will continue to engage with Gypsy and Traveller communities throughout the preparation of the proposed plan.



Older people and disabled people

Section 16B(3)(b)(i) and (i) of The Town and Country Planning Act (Scotland) 1997 (as amended) requires the local development evidence report to set out a summary of the action taken to support and promote the construction and adaptation of housing to meet the housing needs of older people and disabled people, and an analysis of the extent to which the action has helped to meet those needs.

The Cairngorms National Park has adopted Local Development Plan 2021 policies (Policies 1.4 and 3.3), housing supplementary guidance and design and place-making non-statutory guidance which support housing that is designed for specialist needs. The design and place-making guidance includes an 'Adaptable' section, which promotes development that can accommodate future change and adaptable design that takes into account how people use places differently depending on their age, gender and personal mobility (an increasingly important factor given the rising proportion of elderly people in our communities) and how properties can be adapted to meet the needs of an aging population or those with a disability.

Part of the Cairngorms National Park's response to supporting an aging population is the recognition that greater connection with nature and the outdoors can improve mental and physical health and wellbeing. Cairngorms National Park Partnership Plan objective B9 seeks to install green health referral programmes in all GP practices in the National Park. Taking preventative action, such as this, at an early stage, can have an impact on long-term public health outcomes and on ensuring people remain healthy for longer as they age. Specific responses through the Cairngorms 2030 projects comprise:

- Creating the country's first outdoor resource centre specifically designed to support people living with dementia, their families and carers – enabling enjoyment and exploration of the outdoor environment.
- Working with NHS Highland and partners to deliver a unique public health programme focussed on improving health and wellbeing through access to nature and the outdoors.
- Developing a new economic model for the National Park that benefits people and nature, whilst protecting the planet's resources and special qualities for future generations.

The National Records of Scotland data, summarised in this report, estimates that the population of people of pensionable age in the Cairngorms National Park is projected to rise by 46.3% from 4,629 in 2018 to 6,773 in 2043. This is significantly higher than across Scotland, where the population of pensionable age is expected to rise by 35.5%. There is a need for a diverse range and choice of housing with appropriate options for



care and support in the Cairngorms National Park. This also includes sheltered housing and very sheltered housing options along with care home provision and support for those living with dementia.

Summaries of the evidence of the five constituent authorities is set out below. The full evidence base from which these summaries are taken will be utilised in the formulation of planning policy, in consultation with our local authority partners:

Accessible, adapted and wheelchair housing

Highland Council's Housing Need and Demand Assessment finds that there is a relatively high proportion of adapted stock in their area, particularly in the social rented sector, but with lower adapted stock in the private rented sector. However, the number of houses and bungalows within existing stock provides opportunities for in-situ solutions. While current needs are being met, future needs are likely to require additional provision including new build, adaptations and care at home services. There is a shift from care homes to care at home. This will have significant implications for housing and home-based care and support services.

Aberdeenshire's Housing Need and Demand Assessment highlights that there is a lack of accessible accommodation, with over 900 people waiting for wheelchair / ground floor accessible accommodation. It is estimated that 3,000 properties require adaptations across all tenures. There is an identified lack of accommodation for people with complex care needs and new housing is required.

Angus's Housing Need and Demand Assessment states that current requirements for accessible housing will increase with the aging population. Where adaptations cannot take place, alternative housing options may be required.

Moray's Housing Need and Demand Assessment also notes that there is likely to be an increase in demand for adapted housing, but states that there was a decrease in demand between 2015 and 2019. It is likely that demand on care and support services will increase. Given longer life expectancy, cases are likely to become more complex with increases being seen across a range of client types

Perth and Kinross's Housing Need and Demand Assessment states that unmet need for accessible housing is expressed by almost 2,000 households. 639 of households surveyed have an unmet need for wheelchair accessible housing. Based on the last three years, the average annual turnover of wheelchair properties was three wheelchair properties becoming available each year. The Council and its partners are fully



committed to increasing the supply of wheelchair accessible affordable housing through the Local Housing Strategy with a 10% target set through the Strategic Housing Investment Paper.

Supported provision

Highland Council's Housing Need and Demand Assessment advises that, with the increase in older person population projected resulting in much higher numbers of people aged 75+, demand for sheltered housing and specialist accommodation models is likely to increase. There will be an ongoing need to provide both temporary and permanent accommodation for women suffering from domestic abuse.

Aberdeenshire's Housing Need and Demand Assessment estimates that there will be a shortfall in capacity for older people's care home accommodation. Work is ongoing to determine the needs for people with mental health issues and for sheltered and very sheltered housing services.

Angus's Housing Need and Demand Assessment states that the number of residents in care homes reduced by 5% between 2007 and 2017. There is an unmet need for more flexible specialist older people's housing, such as housing with care. Models such as sheltered and very sheltered housing have become less popular. There is evidence of unmet need for specialist housing for care groups such as mental health, learning disabilities, older people with addictions and sensory impairment. 'Core and cluster' and housing with care models were identified as most suitable for future commissioning.

Moray's Housing Need and Demand Assessment advises that the number of registered places in care homes for all adults fell by 7% between 2012 – 2022. The number of care homes reduced by 30% between 2012 – 2019, a greater reduction than across Scotland. The number has since remained static.

Perth and Kinross's Housing Need and Demand Assessment states that 62.6% of specialist homes managed by social landlords provide housing for older people including sheltered accommodation and 29% of specialist homes provide accessible housing for people with mobility needs. There are 257 waiting list applications for housing for older people amounting to 7.14% of all applications. This equates to 10 applications for every available tenancy. There were 45 care homes in Perth and Kinross in 2017 which was a 20% reduction from 2007. The occupancy rate is the lowest in the Tayside region at 84%. There is an estimated need for 144 health and social care partnership commissioned supported housing tenancies, primarily for households with autism, followed by mixed use client groups.



Non-permanent housing

Highland Council's Housing Need and Demand Assessment highlights that there will be a requirement to provide housing for seasonal / key workers associated with economic growth or providing essential public services in rural areas. There is also an ongoing need to provide temporary accommodation for single homeless people.

Aberdeenshire's Housing Need and Demand Assessment notes that it is difficult to predict future needs, particularly for refugees and migrants. Young single males, prison leavers, care experienced young people and people experiencing domestic abuse are at a higher risk of homelessness.

Angus's Housing Need and Demand Assessment states that there has been a reduction in homeless applications between 2011-12 and 2019-20. It is one of the main regions for migrant workers.

Moray's Housing Need and Demand Assessment advises that there was a 10% increase in homeless applications between 2020 / 2021 and 2021 / 2022, however the amount of time spent in temporary accommodation is reducing.

Perth and Kinross's Housing Need and Demand Assessment states that seasonal agricultural worker registrations have traditionally been the highest in Scotland.

The Proposed Plan will need to take account of the evidence within the local authority housing need and demand assessments and local housing strategies and ensure that specialist needs can be met.

People in further and higher education

There are no further or higher education institutions within the Cairngorms National Park. There are therefore no identified housing needs within the National Park arising from such institutions.

In the absence of demonstrable need, any proposals for housing relating to further or higher education in the National Park may be addressed on policy basis. There are therefore no implications for the Proposed Plan.

Housing delivery

As part of the preparation of the Proposed Plan, the Park Authority will need to prepare a Delivery Programme that will set out how the Park Authority proposes to implement



the local development plan. The Delivery Programme is part of the project management toolkit, helping to focus development planning resources on delivery as well as plan-making. It is instrumental to achieving an outcomes focussed approach to development planning. It should support delivery of the Local Development Plan and achievement of its intended outcomes, rather than being focussed on noting progress of particular actions.

According to Scottish Government's local development planning guidance, ideally, delivery programmes should:

- Clearly indicate how sites are prioritised.
- Specify actions and timescales to deliver sites, including any interventions required, and identifying any costs and constraints and a clear pathway to addressing them e.g. funding sources, timescales / phasing.
- Specify how and when developer contributions will be sought, collected and become available over time to support the delivery of development.
- Establish a deliverable housing land pipeline for the Local Housing Land Requirement.
- Identify a pathway to delivery for longer term allocations.

In terms of housing delivery, the purpose of the housing land pipeline is to provide a transparent view of when land will be brought forward, setting out phasing across the short (1 – 3 years), medium (4 – 6 years) and long-term (7 – 10 years). The adopted Cairngorms National Park Local Development Plan is supported by a Delivery Programme which contains information on the status of currently adopted sites. This was informed by the housing land audits of the planning authorities covering the Cairngorms National Park. The Delivery Programme may be viewed, here:

- <https://cairngorms.co.uk/documents/delivery-programme-2025>

This information will help inform the preparation of the Proposed Plan, while it will also be important that the Proposed Plan's site assessment methodology gathers sufficient information on ownership, constraints, infrastructure and viability to understand the deliverability of sites. This is covered in the Site Assessment Methodology topic paper³⁰.

Rural development

Policy 29 of National Planning Framework 4 states that local development plans should identify the characteristics of rural areas within the plan area, including the existing

³⁰ See Site assessment methodology topic paper: <https://cairngormsldp.commonplace.is/en-GB/proposals/v3/site-assessment-methodology?step=step1>



pattern of development, pressures, environmental assets, community priorities and economic needs of each area. The policy directs local authorities to use the Scottish Government's 6 fold Urban Rural Classification 2020 to identify remote rural areas.

Urban Rural Classification 2022

While National Planning Framework 4 directs local authorities to use the 2020 6-fold Urban Rural Classification, since then a 2022 classification has been released. In the interest of using the most up-to-date data available, the 2022 classification will be the basis for identifying remote rural areas in the National Park.

The Urban Rural Classification provides a consistent approach to defining urban and rural areas across Scotland. The classification is based upon two main criteria:

- Population, as defined by the National Records of Scotland.
- Accessibility, based on drive time analysis to differentiate between accessible and remote areas in Scotland.

The classification is available in multiple forms, including a 6-fold classification which distinguishes between urban, rural, and remote areas through six categories, and an 8-fold classification which further distinguishes between remote and very remote regions.

Population

The population criteria are derived from the Settlements dataset produced by National Records of Scotland, which defines areas of contiguous high-density postcodes that make up a Settlement. There are no large urban areas (populations of 125,000 or more) or other urban areas (populations of 10,000 to 124,999) in the National Park.

Accessibility

Accessibility is measured in terms of drive times to an urban area. This is done by calculating 30 and 60-minute drive times from the population weighted centroids of Settlements with a population of 10,000 or more (for example Large and Other Urban Areas). The results allow areas to be classified in terms of accessibility by the following categories:

- Accessible - areas within a 30-minute drive time of a Settlement with a population of 10,000 or more.
- Remote - areas that are more than a 30-minute drive time (6-fold classification), or areas that have a drive time between 30 and 60 minutes (8-fold classification) from a Settlement with a population of 10,000 or more.
- Very Remote - areas that are more than a 60-minute drive time from a Settlement with a population of 10,000 or more (8-fold classification only).



By combining both the population and accessibility measures, the Scotland-wide Urban Rural Classification is defined.

According to the Scottish Government's 6 fold Urban Rural Classification 2022, the vast majority of the Cairngorms National Park is classified as remote rural, therefore the rural characteristics of the National Park are set out throughout the evidence base for the local development plan (Figure 38). Only Carrbridge and Grantown-on-Spey are classified differently – as Accessible Rural.

6-fold urban rural classifications 2022



Figure 38 Scottish Government's 6 fold urban rural classifications (2022) within the Cairngorms National Park. Reproduced by permission of Ordnance Survey on behalf of His Majesty's Stationery Office. © Crown copyright and database right 2025. All rights reserved. Ordnance Survey Licence number AC0000821810, Cairngorms National Park Authority. Data © Scottish Government, 2025.

Development in the Cairngorms National Park mainly relates to agriculture, estate management, tourism and residential dwellings. Other activities do occur, however, including forestry and commercial activity.



The rural characterises of the Cairngorms National Park are covered in the Land use, soil and resources topic paper:

- <https://cairngormsldp.commonplace.is/en-GB/proposals/land-use-soil-and-resources-survey>

With respect to housing, National Planning Framework 4 and the Town and Country Planning (Scotland) Act 1997 outline two key considerations:

- The desirability of allocating land for the purposes of resettlement.
- The identification of tailored approaches to rural housing and, where relevant, include proposals for future population growth – including provision for small-scale housing such as crofts and woodland.

Tailored approaches to rural housing delivery

National Planning Framework 4 Policy 16 encourages authorities in rural and island areas to set out, in local development plans, tailored approaches to housing which reflect locally specific market circumstances and delivery approaches. This will feed into the local development plan's delivery programme, which is expected to establish a deliverable housing land pipeline for the local housing land requirement.

Since the majority of the National Park is classified as remote rural according to the Scottish Government's 6-fold Urban Rural Classification 2022, the entire approach of the next local development plan should be tailored to that rurality. This includes the Partnership Plan's ambition to deliver 75% affordable housing, the spatial strategy as set out within the Partnership Plan and other policy measures that may support the delivery of rural housing need.

Two recent research papers commissioned by the Scottish Land Commission on housing land supply in rural Scotland and summarised below, provide useful research and recommendations and indicate that further subsidy is often required to service or unlock land in rural areas and that understanding the effectiveness or deliverability of a piece of land is important when allocating land.



The Role of Land in Enabling New Housing Supply in Rural Scotland, Scottish Land Commission (2020)

This paper aimed to investigate and consider the role of land in enabling or preventing the supply of new housing and put forward solutions and recommendations. The issues found were grouped as follows:

- Landowners and land price - there is generally a lack of activity by mainstream builders in rural Scotland and therefore a lack of published land transaction data. This means it is hard for landowners to establish best value leading in some cases to unrealistic land price expectations. However, in most rural locations, land is a small element of the overall cost of a project – sometimes less than 10% (it may account for 30% of the cost in urban areas). The research also found that landowners were not frustrating the supply of housing land and often actively engaged with communities and developers.
- Speculative housebuilding – this model does not work in most rural areas because there is not sufficient depth of demand nor value to allow developers to generate adequate levels of profit. This leads to a distinct lack of ‘mid-market’ new build supply.
- Development cost -outside of market ‘hot spots’, the cost of building a home can be greater than the value of the home once built and more than many people living and working in rural areas can afford.
- Not-for-profit organisations – community development companies, housing associations and local authorities, supported by public sector grant subsidies, are active in rural Scotland.
- Site effectiveness / deliverability – further subsidy is often required to service or unlock land. This is compounded where sites are allocated in local development plans without first understanding if that land is deliverable. The research suggests that understanding the effectiveness or deliverability of a piece of land is far more important than simply having a willing seller or buyer of land.
- Community development companies – while they play a unique and important role, they need support to help steer them through the challenging land procurement process, to ensure that projects are optimised and are viable.
- Grant funding regimes – subsidies are necessary to address market failure. A stable funding regime is needed for more homes to be delivered.
- The planning system – the research found that the system can be overly protective and ‘relatively static’ in rural areas, although there are great examples of innovative policy and practice. A lack of deliverable land, particularly in areas of high demand and ‘hot spots’ can also place upward pressure on house prices and land prices.



- Availability of tools – The research that there are many tools and examples of good practice in rural Scotland that could help unlock new land opportunities and break down existing barriers.

A series of case studies are presented. This includes a former sawmill site in Rothiemurchus (in the Cairngorms National Park). This summarises the community-led development of four self-build plots by four local families, financed by the sale of two serviced plots on the open market. This therefore was a 'no subsidy' or 'cross-subsidy' model made possible by a willing landowner and highlights how a collaborative partnership approach can unlock projects. However, it also highlights that the project moved very slowly, demonstrating the complexity of rural housing delivery (in this case partly due to an environmentally sensitive site) and the need for community groups to have more support and resource at an early stage.

Land Supply for Housing in Rural Scotland, Scottish Land Commission (2024)

The aim of this research was to pick-up where the 2020 research (above) left-off and make practical recommendations to help deliver a 10-year pipeline of developable land in rural Scotland. The paper makes recommendations under four headings, summarised as follows:

- Delivering housing land – while a national housing land agency (like Homes England) to assemble land was supported by some participants in the research, their conclusion is that an agency may have no clear role and the new local development plan process of preparation and adoption should ensure that public interest in rural housing delivery is achieved without an agency. It recognises that this will require collaboration between key partners and that delivery plans will need 'tight prioritisation of projects'.
- Alternative governance models – flexible models are suggested that can blend the advantages of the national and local set-up. It does recommend that if a national agency is progressed, that the Scottish Land Commission is well-placed to consider its constitution, structure, financing and appropriate powers.
- Local Place Plans – the values of these to provide place-based community-led bottom-up evidence are recognised, however the report recommends that financial support from Scottish Government is needed to support local place plan production to make them effective.
- Increased support to expand existing provision – a 'carrot and stick' approach to tackling problematic concentrations of land ownership is identified. Their research (contrary to the first paper above) is that there is an unwillingness of some key landowners to release land and that this is one of the main barriers to new housing development. Tax incentives for landowners are recommended, where a local need



for housing has been identified. Wider use of compulsory purchase orders could also be used to deliver public good, with the paper recommending that the Scottish government should consider new land acquisition powers for local authorities. Masterplan consent areas could also be a useful tool. It also recommends that the Scottish Government could ring-fence council tax revenues from long-term empty properties for the delivery of affordable homes. Finally, it, like the first research paper, notes the absence of volume housebuilders and demonstrates the crucial role of community-led initiatives and rural housing enablers such as Rural Housing Scotland and the Communities Housing Trust. It recommends that housing enablers and small and medium enterprise builders and contractors continue to be supported by the Scottish government.

The adopted Cairngorms National Park Local Development Plan 2021

Within the adopted Cairngorms National Park Local Development Plan, Policy 1: New housing development includes several tailored approaches that may be carried forward, in an original or amended form, into the next local development plan to meet this aim. Notably, these are:

- Policy 1.2: Housing development in existing rural groups, which allows for the modest addition of new housing in locations outwith settlements.
- Policy 1.3: Other housing in the countryside, which seeks to support rural businesses and make use of previously development land.
- Policy 1.5: Affordable housing, which sets out the affordable housing requirement within settlements, including 45% in Aviemore, Ballater, Braemar and Blair Atholl.
- Policy 1.6: Affordable housing exception sites, which sets out for criteria for delivering affordable housing outwith of settlements.

Policy 1, alongside all other policies of the adopted Local Development Plan, is undergoing review as part of the preparation of the evidence report.

It is considered that the current approaches can facilitate the measures of delivery suggested by National Planning Framework 4, including delivery of housing on crofted land³¹.

³¹ See the topic paper on Land use, soil and resources for information of croft land within the Cairngorms National Park: <https://cairngormsldp.commonplace.is/en-GB/proposals/v3/land-use-soil-and-resources-survey?step=step1>



Resettlement and fragile communities

Section 15(5)(cc) of The Town and Country Planning (Scotland) Act 1997, as amended, requires the local development plan to consider the desirability of allocating land for the purposes of resettlement.

National Planning Framework 4 Policy 17 requires local development plans to set out tailored approaches to rural housing and, where relevant, include proposals for small-scale housing such as crofts and woodland crofts and the appropriate resettlement of previously inhabited areas. It advises that local development plans should identify, in the spatial strategy, previously inhabited areas that are suitable for resettlement.

Policy 17c supports new homes in remote rural areas where the proposal 'supports and sustains existing fragile communities; supports identified local housing outcomes; and is suitable in terms of location, access, and environmental impact'. Similarly, Policy 29 encourages development that will contribute to rural economies and communities and National Planning Framework 4's cross-cutting outcome to achieve rural revitalisation requires greater constraint in areas of pressure and a more enabling approach in rural areas with fragile communities. This requires local development plans to identify existing fragile communities.

Population shrinkage

As set out in Scottish Government's Migration and Population Expert Advisory Group's report on Place-based policy approaches to population challenges (2022), Scotland is not alone in exhibiting a rising interest in population trends and related policy. Concern is manifest across the developed world. Total fertility rates across most of Europe are now well below replacement levels, and nobody really knows whether what lies ahead for national populations is a steady state, or a slow decline. A report (ESPON 2020) found that almost two-thirds of rural regions³² across Europe, containing 40% of Europe's population, are 'shrinking'.

Based on census estimates, the Cairngorms National Park appears to have experienced population decline between 2011 and 2022. However, it is difficult to ascertain the extent of this decline with any degree of certainty, due to the limitations set out on page 44 of this topic paper³³.

³² Defined as predominantly rural and intermediate according to a Eurostat urban-rural classification.

³³ For further information, see: <https://cairngorms.co.uk/uploads/documents/Local-Development-Plan-Evidence-Report/Supporting-Documents/Statistical-areas-used-in-the-analysis-of-the-Cairngorms-National-Park.pdf>



The report by the Migration and Population Expert Advisory Group investigates methods of identifying of geographical patterns of population change using small area population estimate data. It identifies two ways in which a 'shrinking' population as an embedded and sustained process can be distinguished from other random fluctuations:

- Duration
- Intensity.

In the case of duration, the peak year for each data-zone was identified for 2011 data zones. The number of years since that peak was used as an indicator of duration. The average annual percentage population change since the peak year was calculated (and mapped), as an indicator of intensity.

It should be noted that the precise thresholds of duration and intensity which may define shrinking data zones are a matter of judgement. The report therefore presents an illustrative analysis using thresholds 'which seem reasonable, but we offer no specific scientific justification for them'. The report's intention was not to identify specific target zones for policy, but rather to demonstrate the strengths and weaknesses associated with a replicable and evidence-based selection procedure, based upon available small area population estimate data, but also informed both by an understanding of complex shrinking, and the associated policy requirements.

Therefore, for the purpose of illustrating how such data may be used to identify a set of data zones most affected by sustained population decline the report combines the duration and intensity criteria. It proposed that a shrinking data-zone is one which has been shrinking for more than 10 years, at a rate of at least 1% per annum. The analysis did not identify any data zones which fall within the statistical areas used in the analysis of the Cairngorms National Park as meeting this definition.

It should be noted that the report was compiled before the release of the 2022 census estimates and the subsequent revisions to Scotland's annual small area mid-year population estimate data. Repeating the analysis using rebased population estimates for 2011 – 2022, eight data zones are identified as meeting the definition of a shrinking population (Figure 39).



Shrinking criteria satisfied

- Neither
- One
- Both

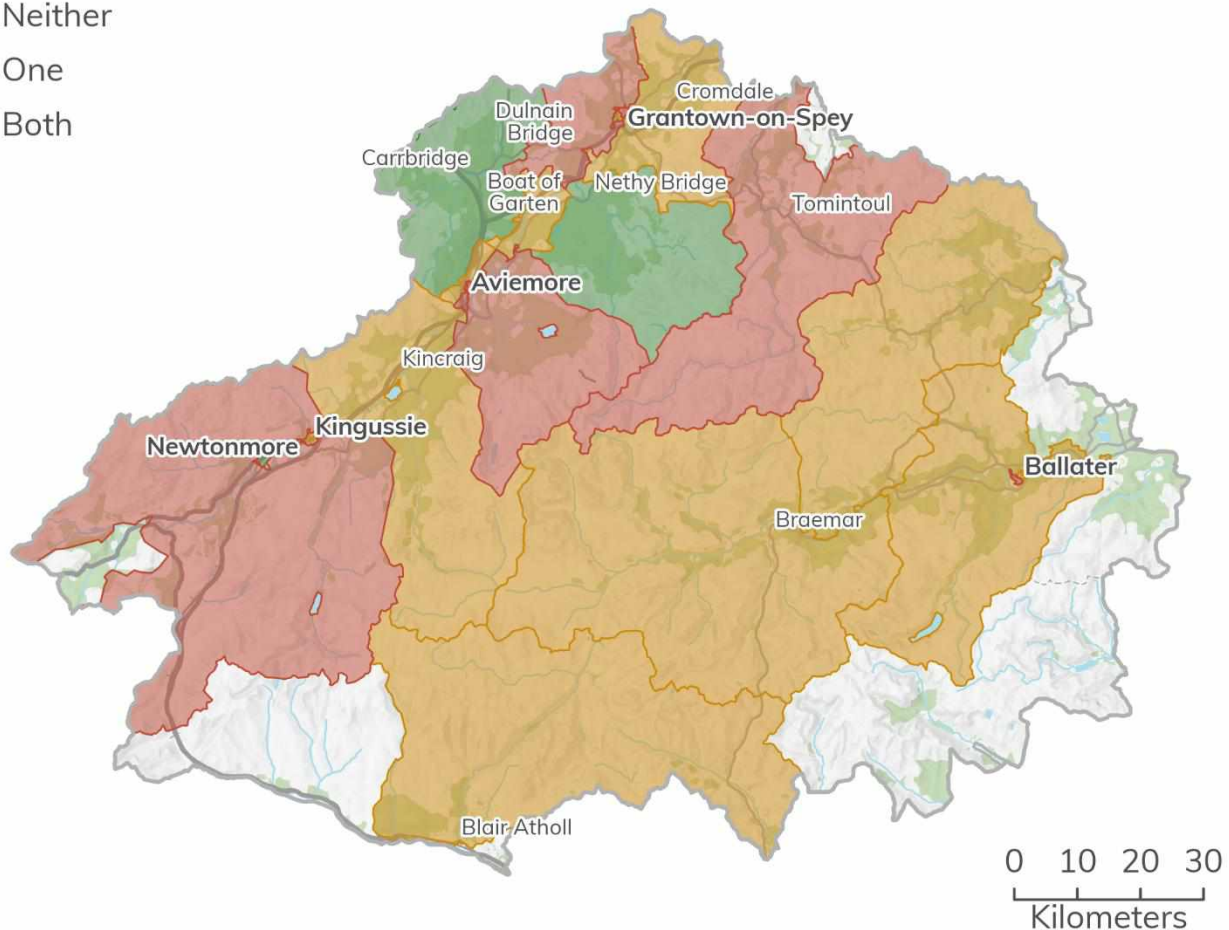


Figure 39 Data zones within the Cairngorms National Park according to whether or not they satisfy the shrinking population criteria – has been shrinking for more than 10 years, at a rate of at least 1% per annum – in 2022. Reproduced by permission of Ordnance Survey on behalf of His Majesty's Stationery Office. © Crown copyright and database right 2025. All rights reserved. Ordnance Survey Licence number AC0000821810, Cairngorms National Park Authority. Contains data © National Records Scotland, 2025.

When considering the matter of a shrinking population against National Planning Framework 4's requirement for local development plans to consider identifying previously inhabited areas that are suitable for resettlement, it is necessary to consider the nature of population decline. In the Cairngorms National Park, it is not that areas have become depopulated and in need of resettlement; rather it is that deaths exceed births and net migration (see Table 6), while the number of households increased (see Figure 10) – leading to lower average household sizes (see Figure 11). Therefore, the Park Authority cannot identify any previously inhabited areas that are suitable for resettlement in the proposed plan's spatial strategy. However, it is necessary to consider whether or not a shrinking population is a marker of community fragility.



Fragile communities

While national and international reports and studies attempt to identify characteristics of fragility, there is no universally established definition of what constitutes a 'fragile community'. The definition of 'community' within this context is also not universally established and the term may be applied to a range of social relationships, which may or may not relate to a specific geography. There is however a range of diverse data available that may be used to characterise 'rural areas' according to their relative socio-economic performance, wellbeing, deprivation or fragility. This data may be used by planning authorities to provide a nuanced, complex and place-specific understanding of the needs and challenges, opportunities and assets of different areas.

To aid the application of National Planning Framework 4, the Park Authority has therefore undertaken an analysis of quantitative methods and data to help identify fragile rural areas within its plan area. This is covered in detail in the following supporting document and summarised in this topic paper:

- <https://cairngorms.co.uk/uploads/documents/Local-Development-Plan-Evidence-Report/Supporting-Documents/Identifying-fragile-rural-areas-in-the-Cairngorms-National-Park-2025.pdf>

The data used in the analysis is also available to download, here:

- <https://cairngorms.co.uk/uploads/documents/Local-Development-Plan-Evidence-Report/Supporting-Documents/Identifying-rural-fragile-areas-data.xlsx>

Based on the review of existing measures of rural characteristics, with a focus on those that may indicate fragility, and a review of small area statistical datasets that are currently publicly available, the following indicators, which are grouped into four broad indicator types, have been identified used to determine whether an area is likely to be fragile.

Population

- Population shrinkage
- Old-age dependency ratio
- Change in old-age dependency ratio

Economic

- Unemployment rate
- Median gross household income per week



- Proportion of low-income households
- Number of industries

Access to services

- Drive times to a general practitioner
- Drive times to a retail centre
- Drive times to a primary school
- Drive times to a secondary school
- Public transport times to a general practitioner
- Public transport times to a retail centre

Housing

- Median house price to median household income ratio
- Proportion of second homes
- Proportion of long-term empty homes
- Change in proportion of long-term empty homes

To be identified as a fragile area according to this analysis, a data zone is classified as a fragile area if the thresholds are met for:

- One population indicator, and at least
- One economic, access to services or housing indicator.

The analysis found that there are eight data zones within or overlapping the Cairngorms National Park's boundary that meet the classification.



Meets one population and one economic, access to services or housing indicator

- Fragile area
- Not fragile area

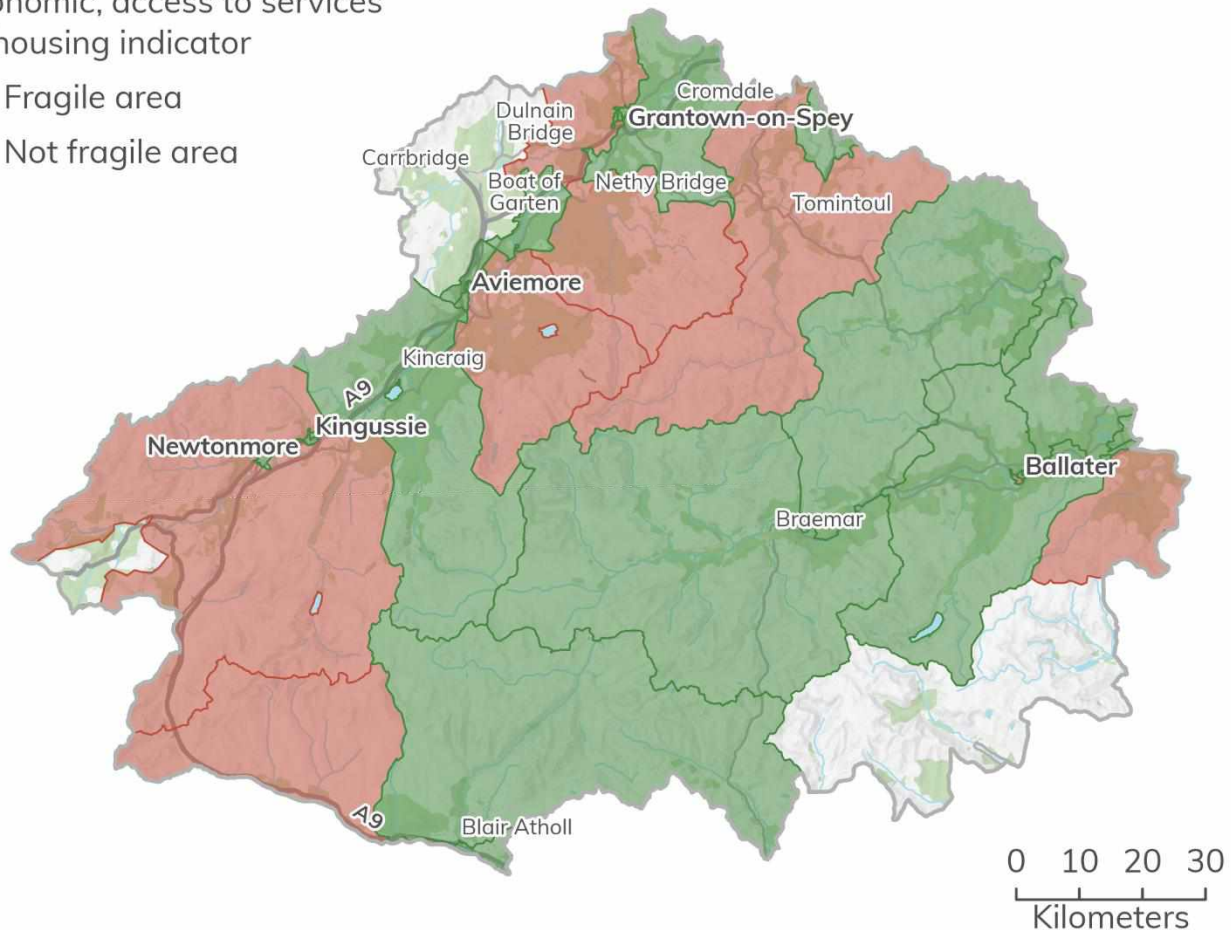


Figure 40 Remote rural and remote small town data zones within or overlapping the Cairngorms National Park boundary that meet one population and one economic, access to services or housing indicator and therefore meet the fragile rural area classification. Cairngorms National Park Authority © Crown copyright and database rights 2025 Ordnance Survey AC0000821810.

Table 50 provides a summary of the indicator types that were met by each of the areas. Full information may be found in:

- <https://cairngorms.co.uk/uploads/documents/Local-Development-Plan-Evidence-Report/Supporting-Documents/Identifying-rural-fragile-areas-data.xlsx>



Table 50 Data zones within or overlapping the Cairngorms National Park boundary that meet the fragile rural area classifications.

Data zone reference number	Data zone name	Council area name	Population indicator met	Economic indicator met	Access to services indicator met	Housing indicator met
S01006789	East Cairngorms - 01	Aberdeenshire	✓	✗	✗	✓
S01006797	Aboyne and South Deeside - 04	Aberdeenshire	✓	✗	✓	✗
S01010532	Badenoch and Strathspey South - 02	Highland	✓	✗	✓	✓
S01010539	Badenoch and Strathspey Central - 04	Highland	✓	✗	✗	✓
S01010542	Badenoch and Strathspey North - 01	Highland	✓	✗	✗	✓
S01010543	Badenoch and Strathspey North - 02	Highland	✓	✗	✓	✓
S01011045	South Speyside and the Cabrach - 01	Moray	✓	✗	✓	✓
S01012016	Rannoch and Aberfeldy - 04	Perth and Kinross	✓	✗	✓	✗

The population weighted centroid of two of these data zones (S01012016 – Rannoch and Aberfeldy – 04 and S01006797 – Aboyne and South Deeside – 04) fall outwith the National Park boundary. This means that the majority of their populations live outwith the National Park and that the impact of any policy approaches adopted by the Park Authority are unlikely to have a significant impact on these areas. The areas within the National Park are however worth considering when identifying fragile rural areas in the National Park context, as it will mean that any policy approaches identified in the Proposed Plan may be consistently applied.

The settlements named within the Cairngorms National Park Partnership Plan's 2022 – 2027 spatial strategy, which fall within these data zones are:

- Aviemore (part)
- Ballater (part)



- Coylumbridge
- Dalwhinnie
- Dulnain Bridge
- Glenlivet
- Glemmore
- Inverdrue
- Laggan
- Nethy Bridge
- Tomintoul.

The proposed plan should consider how the boundaries of identified fragile rural areas are drawn, particularly within the context of settlements that are partially identified in this analysis. For example, due to the small size of the two data zones covering Ballater, it may worth identifying Ballater as a fragile area in its entirety. This would simplify the application of policy and should make policy outcomes, for example the delivery of affordable housing, easier to achieve.

From a practical perspective, the analysis is limited by the availability of data for small areas. More up-to-date data is due to be published next year (or example, the 2026 Scottish Index of Multiple Deprivation) and this should be taken account of during the preparation of the Proposed Plan.

The analysis is also entirely quantitative in nature and is not informed by qualitative data, such as that that may be gathered through public engagement. Therefore, the identification of fragile rural areas may be informed and refined during the preparation of the Proposed Plan, which will include direct community engagement, with a focus on placemaking.

The key output of this analysis, therefore, is the framework for analysis that will be used and refined during the preparation of the Proposed Plan, with the aim of identifying fragile rural areas within its spatial strategy.

The report supporting this topic paper³⁴ forms part of the local development plan's evidence report engagement material. The Park Authority will consider comments made during the engagement and the approach to identifying fragile rural areas may be amended as a result.

³⁴ See <https://cairngorms.co.uk/uploads/documents/Local-Development-Plan-Evidence-Report/Supporting-Documents/Identifying-fragile-rural-areas-in-the-Cairngorms-National-Park-2025.pdf>



In conclusion, the Proposed Plan should identify fragile rural areas within its spatial strategy based on the analysis carried out in this report. This should include some refinement of boundaries to reflect practical factors such as the implementation of policy. It should also include refinement through direct community engagement carried out during the Proposed Plan's preparation, as this may provide more qualitative information to inform the assessment of fragility.

The identification of fragile rural areas should aid the implementation of National Planning Framework 4. The Proposed Plan may also consider its own policy approach for development within these areas, for example by setting higher thresholds for affordable housing.

Housing in town centres

All settlements within the National Park are small, with correspondingly small town and village centres. The five designated strategic settlements have identified town centre boundaries which are tightly drawn and have little in the way of vacant or derelict land³⁵. Nevertheless, it may be possible to provide a proportion of the local development plan's housing land requirement in these town centres, to respond to National Planning Framework 4 Policy 27, and this will be proactively pursued through the call for ideas and sites process and through ongoing monitoring of the settlements, future town centre health checks and review of the town centre boundaries.

A town centre health check was undertaken in 2023³⁶. It identified, with the exception of Aviemore, that there is already significant residential use in each strategic settlement, with 53% of premises in residential use in Ballater, 52% in Grantown-on-Spey, 73% in Kingussie and 73% in Newtonmore. In Aviemore, 5% of properties are in residential use.

Self-build housing

The Planning (Scotland) Act 2019 (Section 16E) requires planning authorities to prepare and maintain a self-build register. The Cairngorms National Park opened its self-build register in March 2024, inviting people with an interest in acquiring land for self-build across the authority's area to register their interest.

³⁵ Further information of vacant and derelict land is contained within the Landuse, soil and resources topic paper: <https://cairngormsldp.commonplace.is/en-GB/proposals/land-use-soil-and-resources-survey>

³⁶ See Retail topic paper: <https://cairngormsldp.commonplace.is/en-GB/proposals/v3/retail-and-town-centres?step=step1>



There are (as of 1 July 2025) 115 individuals (this includes families and households) and two groups on the register. Their responses to the registration questionnaire can be summarised as follows:

Characteristics of those on the register:

- 105 of those on the register have stated that they have not signed up to a register in another local or national park authority.
- Nearly half of those on the register (48%) already live in the Cairngorms National Park.
- 44% state that they work in the Cairngorms National Park and 3.5% indicate that they are retired.
- 61% are owner-occupiers of their current house, with 15% in private rental accommodation and 10% live with their parents, other relatives or with another household. 5% are in worker accommodation and 3% in social rental accommodation.

Preferences of those on the register (respondents could choose multiple options):

- 71% indicated that they would look to build in Highland Council, 41% in Aberdeenshire, 27% in Moray, 21% in Perth and Kinross and 13% in Angus.
- 72% of those on the register selected a preference for an individual self-build project, 54% an individual developer build (custom build), 28% a community / group self-build, 12% a developer-led group project and 17% co-housing.
- Asked to state whether they would consider a self or custom build plot as part of a larger new build development, 31% said yes and 45% said maybe. 23% said no.
- 73% indicated that they would look for a rural countryside location, 63% a woodland croft, 51% a strategic settlement, 50% a village, 40% an agricultural croft, 21% a countryside housing group and 13% a specific settlement or location.
- 59% stated that they would be interested in a plot with the rural housing burden.
- 30% indicated that they were unsure what size of plot they were seeing and 28% indicated that they didn't mind. 27% indicated that they were seeking over 1500m², 18% 1,000 – 1,500m², 17% 750 – 1,000m², 20% 400 – 750m² and 14% under 400m².
- 82% stated that they would consider conversion of an existing traditional building (such as an agricultural steading), with a further 16% stating that they maybe would. Less than 2% said that they would not.
- 87% indicated, when asked to tick all that apply, that they want to build a detached house, 41% a detached house with ancillary residential accommodation, 28% a bungalow, 7% a semi-detached house and 4% a house with specialist adaptive needs. 9% ticked 'other'.



- 35% stated that they require three bedrooms, 27% two bedrooms, 21% four bedrooms, 4% five bedrooms plus and 4% one bedroom.
- 31% stated that they had an overall budget of £300,000 and 16% £200,000 - £250,000. 14% had a budget of £250,000 – £300,000 and 13% under £100,000.

The information contained within the register will be used to inform the proposed plan, which may include its policy approach to rural housing delivery as well as the provision of self-build plots on allocated sites.

Summary of implications for proposed plan

The proposed plan needs to be prepared in accordance with:

- The four aims of the National Park as set out in The National Parks (Scotland) Act 2000), in particular the first aim 'to conserve and enhance the natural and cultural heritage of the area'.
- The spatial strategy and principles of National Planning Framework 4, in particular by:
 - Supporting a planned response to minimise the impact of second homes on local communities.
 - Ensuring new homes are affordable and meet local needs.

In its preparation the proposed plan should:

- Align with the Cairngorms National Park Partnership Plan 2022 – 2027. In particular through:
 - Following the spatial strategy by consolidating the role of the strategic settlements as the most sustainable places for future growth and the focus for housing land supply and providing any additional flexibility in future land supply for housing at small sites around a wider range of settlements.
 - Supporting the objective B1 target that the proportion of young and working-age people increases relative to the total resident population, which remains stable;
 - Supporting the objective C1 target that a maximum of 15% of all housing stock in the National Park will be second homes, vacant or short-term let properties by 2040.
 - Supporting the objective C2 target that by 2030, 75% of new housing is for social rental, mid-market rental or other affordable categories that provide affordability in perpetuity.
 - Supporting objective C3 target that the percentage of developable land in community or public body ownership is increasing.



- Take account of the priorities of community action plans.
- Have regard to the constituent local authorities' local housing strategies.
- Have regard to the list of persons seeking to acquire land in the Cairngorms National Park for self-build housing.
- Identify gaps in housing provision, including in relation to self-provided homes; accessible, adaptable and wheelchair accessible homes; build to rent; affordable homes; size of homes; homes for older people, including supported accommodation, care homes and sheltered housing; homes for people undertaking further and higher education; and homes for other specialist groups.
- Propose a 10-year local housing land requirement of around 889 new homes.
- Identify sufficient deliverable land to meet the 10-year local housing land requirement in locations that create quality places for people to live.
- Continue to engage with Gypsy / Travellers and travelling showpeople on their housing needs and consider whether there is a need to identify land to ensure provision of accommodation for Gypsy / Travellers and travelling showpeople.
- Prepare a local development plan delivery programme to establish a housing land pipeline.
- Set out tailored approaches to rural housing, which may include provision for small-scale housing such as crofts and woodland crofts.
- Following the approach set out in this report, identify fragile rural areas in the spatial strategy.
- Identify opportunities for meeting housing need within town centres.