

## SECTION 10

### SOCIO-ECONOMIC, COMMUNITY IMPACT and TOURISM & RECREATION

#### 10.1 Introduction

**10.1.1** This chapter provides an assessment of the potential Socio-Economic, Community, and Tourism and Recreation effects that could occur as a result of the development of the proposed project. As described in detail in Chapter 1, 2 & 3, the proposed An Camas Mòr development is a new planned and sustainable community, which would be developed in response to identified housing demand in the Badenoch & Strathspey area. An Camas Mòr would be designed as a sister community to Aviemore, providing houses, community, sports and business facilities and would facilitate projected population growth and enhance economic prosperity in the area.

**10.1.2** The approach to this assessment has been developed in accordance with the agreed methodology for the overall proposed project, as well as the outcome of specific consultation undertaken to inform the content of this chapter.

**10.1.3** The approach adopted in the preparation of this assessment includes a review and socio-economic and tourism profile of the existing baseline conditions in the survey area<sup>12</sup> and the surrounding area. Key issues, trends and the performance of the local Aviemore economy and tourism relative to Badenoch & Strathspey and Scotland are outlined; factors influencing these conditions; and any direct and indirect effects of the proposed development. It also considers the potential impact of the proposed project upon the socio-economic, community, tourism and recreation, and business resources within the overall survey area.

**10.1.4** The key objectives of the assessment are:

- To determine the socio-economic profile, and the associated issues, taking account of the local, regional, and Scottish context;
- To determine the nature of the tourism and visitor resources, and the associated tourism issues, taking account of the regional, Scottish, and wider context;
- To identify the principal socio-economic, community and tourism and recreation effects (both positive and negative) that may result from the proposed project and assess the significance of these effects;
- To recommend measures for preventing, reducing and offsetting any identified significant adverse effects, and / or enhancing any beneficial effects where possible; and
- To identify any residual adverse effects.

<sup>12</sup> The survey area for assessment of potential impacts of development upon the socio-economic structure was taken to be within the wider Aviemore and surrounding area; tourism and recreation activities and facilities, and community facilities in the area defined as 10km from the boundary of the proposed site of An Camas Mòr.

#### 10.2 Sources of Information

**10.2.1** The assessment included an extensive review of information sources to establish existing conditions and to identify current business, community activities and resources as well as tourism and recreational activities within the survey area. The datasets used in this document are those standard sources of socio-economic and demographic data from standard available datasets, including the Census, NOMIS, along with standard sources of tourist and visitor data found on VisitScotland's website on [www.scotexchange.net](http://www.scotexchange.net), and other individual research, reports, and surveys referenced throughout the chapter. A full list of these is provided in the Appendix F.

**10.2.2** A profile of the Aviemore / An Camas Mòr area in socio-economic terms was requested from HE113 and provided for the purposes of informing this assessment.

**10.2.3** In addition, a business survey of the business community in the surrounding area provided the business community's view and quantification of potential impacts and effects of the proposed development of An Camas Mòr.

#### 10.3 Methodology

**10.3.1** This assessment was carried out to establish the nature and conditions of the economy, demographic pressures and issues, community, tourism and recreational resources in the defined area. This involved a review of standard datasets and information sources, research and other reports; together with discussion and consultation with appropriate organisations, bodies, agencies, and authorities. The assessment is based upon a robust and well tested methodology employing a combination of web-based, desk-based, and visual survey, and information assessment and analysis. This approach has been previously robustly tested and accepted as valid through various stages of the development process and at public inquiry, and has also been the subject of testing with consultees as part of this process.

**10.3.2** The outline detail of the method and overall scope of works followed to produce this assessment are as follows:

##### Purpose & Remit

- The purpose and remit of these studies is to identify as part of the Environmental Impact Assessment (EIA) the potential impacts of the development upon the socio-economic structure within the wider Aviemore and surrounding area; and tourism and recreation facilities and activities, and community facilities within an area defined as 10 km from the proposed site of An Camas Mòr.

##### Overall scope of works

<sup>13</sup> "An Camas Mòr Socio-economic Profile", by Cogent Strategies International prepared for Highlands and Islands Enterprise, October 2008

- The overall scope of works for these assessments is undertaken on the following basis and through the following stages:
  - Baseline Assessment;
  - Consultations; and
  - Statement of Socio-Economic and Community Facility rationale.

### **Assessment of Impact – direct, indirect, and residual**

#### **10.3.3** The Baseline Assessment was undertaken as follows:

- Collection of baseline data and information setting An Camas Mòr in context at regional and local levels;
- Profiling of the Socio-Economic, and Tourism and Recreation circumstances, facilities, and activities, and Community Facilities in the area based upon publicly available sources of data and information, including on demographic change; employment; unemployment; wage levels; economic sectoral emphasis, strengths and weaknesses; current circumstances, events, and proposals for development; and opportunities and threats in the area; and
- Identification of the key issues experienced within the area, together with the key socio-economic and demographic trends and forecasts based upon publicly available sources of data and information.

#### **10.3.4** These data and information are to be derived from a mixture of published sources and also from the responses to consultations (see below).

#### **10.3.5** Consultations were undertaken as follows:

- Identification of key consultees and local stakeholders, which are able to provide data, and their views upon key issues in the area;
- Consultation letter sent to consultees informing them of the background, purpose and remit, scope of the assessments, and seeking data and their views upon key issues in the area, and also the method of approach taken;
- The consultations to be undertaken on the basis of face to face, telephone, and email based discussions; and
- The responses of the consultees fed into both the baseline assessment and also contribute to the assessment of impact in terms of both quantitative and qualitative factors.

#### **10.3.6** The Statement of Socio-Economic & Community Rationale provides the following:

- Statement of socio-economic and activity mix – to provide sufficient and appropriate employment opportunities within the development to maximise locally based working, and while recognising commuting between home and workplace would occur, to minimise where possible the prospects and necessity for such commuting;

- Statement of employment and economic focus and target sectors – to target high value, high quality investment and employment opportunities, to provide a well-balanced mixture of employment and self-employment activities; and to promote environmental sustainability as a theme creating an exemplary project within the Cairngorms National Park area; and
- Provision of benchmark or other comparative case study experience – to demonstrate the viability and compelling business case supporting the project.

#### **10.3.7** The Assessment of Impact was undertaken as follows:

- A Business Survey of the widest range of business interests within the surrounding area undertaken to determine the business community's views of the potential impact of An Camas Mòr, measured in terms of turnover, employment, investment, level of trade, and ease of recruitment of staff;
- Reference made to comparative case study experience, and how such new development might / might not impact upon the development's local and wider context;
- The impact assessment analyses and addresses the potential socio-economic impacts, tourism & recreation impacts, community facility impacts, and key conclusions for each;
- The assessment takes the view that potential mitigation of the impact of the proposed An Camas Mòr development in a socio-economic context, would be achieved through the provision of a mixture of locally based employment space to create an environmentally sustainable development, and induce a reduction in commuting into and out of An Camas Mòr; and
- The output of the assessment is a statement of residual socio-economic, tourism and recreation, and community facility impacts / effects, based upon a range of impact evaluation criteria, and specifying such impacts in terms of major, moderate, slight negative or positive, and neutral or no impact predicted.

#### **10.3.8** The baseline assessment covers all socio-economic and tourism aspects, setting a context for the remainder of the assessment, and against which any impacts and residual effects can be set.

#### **10.3.9** In addition to the data and research review, a Business Survey of all businesses within the memberships of the local Cairngorms Chamber of Commerce and Aviemore & District Business Association was carried out during September – October 2008. The survey was undertaken via the business organisations, with a brief survey form being distributed to the organisations' members.

#### **10.3.10** This information and responses from the business community has been used to establish the potential scale of impact and effect – positive or negative – which would be likely to occur as a result of the development of An Camas Mòr.

#### **10.3.11** The Business Survey however did not attempt to provide 100 % business coverage in all areas within the survey area as this would have been impractical in the absence of an existing comprehensive business database. However the coverage of businesses across the survey area is viewed as being reasonably representative of the business structure of the area, and the

response is used as a proxy for these businesses' customer and client base, and users of the facilities within the area.

10.3.12A copy of the Business Survey questionnaire is provided in the Appendix F.

10.3.13The results of the assessment have been drawn together in the form of summary conclusions on quantitative and qualitative effects. Supporting detailed information and data have been included as Appendices to substantiate the conclusions.

### Baseline Assessment

10.3.14This baseline assessment details the key aspects and issues within the area's economy. Thereafter it outlines the position of the immediate and surrounding area where the development would take place, providing a base against which any future impacts and effects from the development can be measured.

## 10.6 Socio-Economic Baseline Conditions

10.6.1 The analysis below outlines the structure of the Aviemore economy, its strengths, weaknesses, and key sectors relative to the wider sub-region of Badenoch & Strathspey, and Scotland overall.

### Population Structure

10.6.2 The population of Aviemore increased by 10.5 % between 1991 and 2001 and stood at 2,657 at the last census count (2001). The area of Badenoch & Strathspey, and Scotland also increased during this period but by a smaller rate of 6.9 % and 1.2 % respectively. Furthermore, the An Camas Mòr Socio-economic Profile<sup>14</sup> indicates that local growth between 2001 and 2006 was c.9 %, five times higher than the growth in the Highlands and Islands population and more than eight times the increase experienced elsewhere in Scotland.

10.6.3 A breakdown of Aviemore's population and age structure (Table 10.1) shows the area has a healthier population structure compared to Badenoch & Strathspey and Scotland.

10.6.4 Aviemore has a lower dependency ratio relative to Badenoch & Strathspey, and Scotland. The area has a lower proportion of people aged 65-75yrs and 75+yrs compared to the wider region of Badenoch & Strathspey and Scotland overall. This has implications for local government spending and means the area should not place excessive demands upon health and community services and social facilities, relative to Badenoch & Strathspey and Scotland as a whole.

10.6.5 Aviemore also has a higher proportion of people aged 25-44yrs and 15-24yrs compared to Badenoch & Strathspey. Relative to Scotland, Aviemore has a higher number of people aged 25-44yrs but slightly less people in the 15-24yrs category. Aviemore therefore has a higher proportion of people who could work and pay taxes. This larger tax base coupled with Aviemore's lower dependency ratio suggests a healthy population mix within the area. Over the

period of 2001 to 2006, population growth was concentrated on the older age group ranges, with three quarters of the increase in population among those aged 45 years and over<sup>15</sup>.

Table 10.1: Population Structure

	Aviemore 2001	Badenoch & Strathspey 2001	Scotland
Total Population	2,657	11,763	5,062,011
Male	50.1 %	48.7 %	48.1 %
Female	49.9 %	51.3 %	51.9 %
1991 population	2,405	11,008	4,998,567
<b>Percentage of Population :</b>			
Aged 0-4	5.9 %	5.2 %	5.5 %
Aged 5-14	12.6 %	13.3 %	12.4 %
Aged 15-24	11.1 %	8 %	12.5 %
Aged 25-44	32.4 %	26.3 %	29.2 %
Aged 45-64	26.5 %	28.7 %	24.5 %
Aged 65-74	6.8 %	10.1 %	8.8 %
Aged 75 and over	4.7 %	6.2 %	7.1 %

Source: Census 2001

### Labour Market Structure

10.6.6 Aviemore has a higher economic activity rate than both Badenoch & Strathspey and Scotland, mainly attributable to its significantly higher level of full-time employees (Table 10.2). The area also has a higher proportion of people that are self-employed compared to the national average but less self-employed people than Badenoch & Strathspey. Despite Aviemore's high economic activity rate the area has a higher unemployment rate compared to Badenoch & Strathspey and Scotland.

Table 10.2: Economic Activity

	Aviemore	Badenoch & Strathspey	Scotland
All people aged 16-74	1,802	8,607	3,731,079
Part-time employees	12.9 %	12.9 %	11.1 %
Full-time employees	47.9 %	38.4 %	40.3 %
Self-employed	9.4 %	14.4 %	6.6 %
Unemployed	4.4 %	3.4 %	4.0 %
Full-time student	1.7 %	1.6 %	3.0 %

<sup>14</sup> "An Camas Mòr Socio-economic Profile", by Cogent Strategies International prepared for Highlands and Islands Enterprise, October 2008

<sup>15</sup> "An Camas Mòr Socio-economic Profile", by Cogent Strategies International prepared for Highlands and Islands Enterprise, October 2008

Total	76.2 %	70.8 %	65.0 %
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Source: Census 2001

**10.6.7** The main contributor to economic inactivity in Aviemore is the high level of retired people in the area (Table 10.3). However, the number of people retired in Aviemore is still somewhat less than Badenoch & Strathspey and Scotland as a whole. The area also has a lower student population and proportion of people looking after home/family compared to Badenoch & Strathspey and Scotland overall.

**10.6.8** In terms of unemployment, in August 2008, there was an unemployment rate of 1.3 %, significantly lower than the Highlands and Islands (2.1 %) and Scotland (2.8 %)16. During the period of 2004 to 2008, unemployment rates fluctuated between 2 % and 0.9 %17, in downward trend. The unemployment rate was consistently lower than both the Highlands and Island's and Scotland's rates.

Table 10.3: Economic Inactivity

	Aviemore	Badenoch & Strathspey	Scotland
All people aged 16-74	1,802	8,607	3,731,079
Retired	10.6 %	15.5 %	13.9 %
Student	1.6 %	2.2 %	4.3 %
Looking after home/family	4.4 %	4.9 %	5.5 %
Permanently sick/disabled	4.0 %	3.7 %	7.4 %
Other	3.2 %	2.9 %	3.9 %
Total	23.8 %	29.2 %	35.0 %

Source: Census 2001

### Industry of Employment

**10.6.9** The pattern of employment in Aviemore (Table 10.4) reveals an economy which is relatively narrow focused compared with Scotland as a whole. Aviemore has a small number of sectors that are over represented and a large number of sectors where representation is below the national average.

**10.6.10** The pattern of industry of employment in Aviemore is comparable to the wider Badenoch & Strathspey area, sharing the same industries (hotel/catering and wholesale/retail/motor vehicle repair) as its two main industries of employment, although Badenoch & Strathspey is not as heavily dependent on the hotel and catering industry for employment.

<sup>16</sup> "An Camas Mòr Socio-economic Profile", by Cogent Strategies International prepared for Highlands and Islands Enterprise, October 2008

<sup>17</sup> "An Camas Mòr Socio-economic Profile", by Cogent Strategies International prepared for Highlands and Islands Enterprise, October 2008

**10.6.11** The hotel and catering industry contributes almost one-third of all employment in Aviemore but only around one-fifth for Badenoch & Strathspey. The importance of this sector to both area's economy is considerably greater than for Scotland as a whole (accounting for only 5.7 % of all employment in Scotland overall) and demonstrates the area's reliance on the tourist industry. Both Aviemore and Badenoch & Strathspey have a low proportion of jobs in the financial sector compared to Scotland. This sector has been, and continues to be an important driver of economic growth for the national economy.

Table 10.4: Industry of Employment

	Aviemore	Badenoch & Strathspey	Scotland
<b>% of the employed working in:</b>			
Agriculture/hunting/ forestry	2.5 %	4.6 %	2.1 %
Fishing/fish farming	0.3 %	0.2 %	0.3 %
Mining/quarrying	0.5 %	0.7 %	1.2 %
Manufacturing	5.9 %	7.1 %	13.2 %
Electricity/gas/water supply	0.3 %	0.5 %	1.0 %
Construction	5.5 %	8.5 %	7.5 %
Wholesale/retail/motor vehicle repair	13.0 %	12.7 %	14.4 %
Hotels/catering	30.5 %	19.9 %	5.7 %
Transport/storage/ communication	5.9 %	5.1 %	6.7 %
Financial	1.0 %	1.2 %	4.6 %
Real estate/renting/business	7.8 %	8.3 %	11.2 %
Public administration/defence	4.1 %	4.4 %	7.0 %
Education	4.6 %	6.6 %	7.3 %
Health/social work	7.3 %	10.1 %	12.4 %
Other	10.7 %	10.2 %	5.3 %

Source: Census 2001

**10.6.12** Compared to Badenoch & Strathspey, and Scotland, Aviemore has a lower proportion of people employed in traditional industries such as manufacturing, construction and mining/quarrying, and less people employed in education, public administration/defence and health and social work.

**10.6.13** In 2002, employment in the An Camas Mòr area was primarily distributed between Hotels and Catering (33 %), Wholesale and Retail Trade/Repair of Motor Vehicles (14 %) and Real Estate/Renting and Business Activities (14 %)18. This means that approximately one third of jobs are entirely or predominantly servicing the needs of visitors to the area. The Highlands and Islands have a much more even distribution of jobs.

<sup>18</sup> "An Camas Mòr Socio-economic Profile", by Cogent Strategies International prepared for Highlands and Islands Enterprise, October 2008

### Occupational Profile

**10.6.14** When occupational groups are considered (Table 10.5) Aviemore has a very high proportion of people in elementary occupations. These are jobs in which training is generally provided at work and at the starter levels are mainly low paid. Almost a quarter of all jobs in Aviemore are in this occupational group which is approximately 25 % higher than the jobs that fall into this category in Badenoch & Strathspey, and almost double the proportion for Scotland overall. The area also has a higher proportion of people employed in sales and customer services, and fewer in public services.

**10.6.15** Compared to Badenoch & Strathspey the area has a higher proportion of workers in the manager/senior official and associate/ technical occupational categories but far fewer workers in the professional occupational category.

**10.6.16** Overall, Aviemore has a less robust occupational profile compared to Badenoch & Strathspey and Scotland. The area is heavily reliant on low paying occupations and is slightly less diversified relative to Badenoch & Strathspey and Scotland.

**Table 10.5: Occupation Groups**

	Aviemore	Badenoch & Strathspey	Scotland
Manager/senior official	16.5 %	16.3 %	12.6 %
Professional	4.6 %	7.5 %	11.2 %
Associate professional/ technical	11.8 %	11.5 %	14.3 %
Administration/secretarial	9.7 %	8.4 %	13.0 %
Skilled trades	12.8 %	17.1 %	12.6 %
Personal services	7.3 %	8.8 %	7.1 %
Sales/ customer services	8.4 %	6.3 %	7.3 %
Process/ plant/ machine operative	6.6 %	7.2 %	10.0 %
Elementary occupation	22.4 %	16.9 %	11.8 %

Source: Census 2001

### Wage Rates

**10.6.17** The Moray, Badenoch & Strathspey Economic Update (MBSE) by Highlands and Islands Enterprise (October 2003) reported the average gross weekly earnings in 2001 to be £325 (Table 10.6). This was lower than the average gross weekly earnings in the HIE area in 2001 and significantly lower than the average gross weekly earnings in Scotland and Great Britain. The comparatively low wage rates in the MBSE are influenced by the dominance of tourism and processing industries in the area which are typified by low wages.

**10.6.18** Table 10.6 shows that between 2001 and 2007 the average wage in HIE, Scotland and GB increased by at least 2.1 %. If it is assumed that there was a similar increase within the Badenoch & Strathspey area as in the HIE area, then it can be assumed that the 2007 current levels for wages in the area would be in the region of £340.

**Table 10.6: Average Gross Weekly Earnings**

	MBSE (£)	HIE (£)	Scotland (£)	GB (£)
MBSE Update 2001	325	366.8	404.7	444.6
ASHE 2007	340*	383.9	426	453.8
% Increase	n/a	4.7 %	5.3 %	2.1 %

Source: New Earnings Survey - \* is an RTP estimate (see below for details)

### Educational Attainment

**10.6.19** Educational attainment levels for those who are resident in Aviemore are weaker than Badenoch & Strathspey and Scotland (Table 10.7). A lower proportion of people hold higher level Group 3 and 4 qualifications<sup>19</sup> compared to Badenoch & Strathspey and Scotland, and a higher proportion of people hold lower level Group 1 and 2 qualifications relative to Badenoch & Strathspey and Scotland. Aviemore also has a lower proportion of people holding no qualifications or qualifications recognised outwith the Groups in Table 10.7.

**10.6.20** These educational attainment level characteristics anecdotally are believed to occur as a result of those who have higher level of educational attainment tending to leave the area to find employment, due to the shortage locally of both higher value jobs and also affordable housing. However, An Camas Mòr is designed to address each of these constraints.

**Table 10.7: Qualifications**

	Aviemore	Badenoch & Strathspey	Scotland
All People aged 16-74	1,802	8,607	3,731,079
No qualifications or qualifications outwith these groups	30.5 %	31.4 %	33.2 %
Group 1	29.0 %	25.4 %	24.7 %
Group 2	15.8 %	15.1 %	15.7 %
Group 3	8.2 %	6.1 %	7.0 %
Group 4	17.7 %	22.0 %	19.5 %

Source: Census 2001

<sup>19</sup> Qualification Groups: Group 1 (Standard Grades, SVQ Level 1 or 2); Group 2 (Higher Grade, SVQ Level 3); Group 3 (HNC, HND, SVQ Level 4); Group 4 (1<sup>st</sup> Degree, Higher Degree, professional qualification).

### Household Tenure

**10.6.21**The vast majority of households in Aviemore are owner occupied, albeit at a lower level relative to Badenoch & Strathspey and Scotland. Aviemore has a notably higher proportion of rented accommodation relative to Badenoch & Strathspey. Compared to Scotland, Aviemore has a higher proportion of homes rented from a housing association and almost double the proportion of private rented homes. However, Scotland as a whole still has a higher proportion of homes rented from the Council/ Housing Associations / RSLs compared to Aviemore.

**Table 10.8: Household Tenure**

	Aviemore	Badenoch & Strathspey	Scotland
Total number of households	1,166	5,057	2,192,246
<b>Percentage of households that:</b>			
Are owner occupied	59.1 %	65.7 %	62.6 %
Are rented from the Council/Scottish Homes	18.2 %	14.1 %	21.6 %
Are rented from a housing association	6.6 %	2.6 %	5.6 %
Are private rented	12.6 %	10 %	6.7 %
Living rent free	3.5 %	7.7 %	3.5 %
Have no car	29.6 %	19.7 %	34.2 %
Have 1 car	51.4 %	52.0 %	43.4 %
Have 2 or more cars	19.0 %	23.2 %	22.4 %

Source: Census 2001

### Deprivation (SIMD 2006)

**10.6.22**The Scottish Index of Multiple Deprivation (SIMD) 2006 identifies the most deprived areas across Scotland. SIMD 2004 is presented at data zone level which enables small pockets of deprivation to be identified.

**10.6.23**The data for SIMD 2006 was compiled using 37 indicators that describe various aspects of deprivation. These indicators are then grouped into seven individual domains including: Current Income, Employment, Health, Education, Skills and Training, Geographical Access to Services, Crime, and Housing. The data zones are then ranked by these domains and combined to create an overall deprivation ranking.

**10.6.24**SIMD data rankings show the Badenoch & Strathspey area is the least deprived in the highlands with zero data zones in the most deprived 20 % in terms of income, as well as having very little employment deprivation.

**10.6.25**The data zones surrounding the proposed An Camas Mòr are generally in the middle of the rankings, with low income, employment and health rankings. However, housing and geographical access deprivation levels are significant.

### Migration

**10.6.26**The Highland Wellbeing Alliance Intelligence and Monitoring Group Population and Household Projections (May 2004) report produced migration estimates for the 8 Highland district areas.

**10.6.27**The area assumptions were based on a combination of past General Register for Scotland (GRO(S)) assumptions, actual population change between 1991 and 2001, and local knowledge. Assumptions used by GRO(S) in previous sets of projections suggested that net migration had fallen in Highland, from a net increase of 750 per annum in 1994 to a net increase of 100 per annum in 2002 (Table 10.11). The Badenoch & Strathspey area has the second largest predicted annual net-migration (50) in Highland after Inverness (150).

**Table 10.9: Migration Assumptions (2001 I&M Group Projections)**

Area	Annual net-migration assumptions
Badenoch & Strathspey	50
Caithness	-100
Inverness	150
Lochaber	-50
Nairn	50
Ross & Cromarty	0
Skye & Lochalsh	25
Sutherland	-25
<b>Highland</b>	<b>100</b>

Source: Highland Wellbeing Alliance Intelligence & Monitoring Group Population and Household Projections - May 2004

### Population Projections

**10.6.28**The main source of population data in Scotland is GRO(S). Until 1998 projections were produced by the GRO(S) for old District Councils that were used as approximations of current Council areas. This data ceased to be produced in 2000 leaving the Highland Local Authority/Health Board Area as the only up-to-date population projection data providers.

**10.6.29**This measure however could lead to a skewed projection in an area like the Highlands which has different factors influencing population in each area. Figure 10.1 shows that according to the GRO(S) 1998 projections the population in Badenoch & Strathspey was likely to increase by 7 % by 2016. Indeed, of the 8 districts in Highland, Badenoch & Strathspey was forecasted to have one of the largest rises in population.

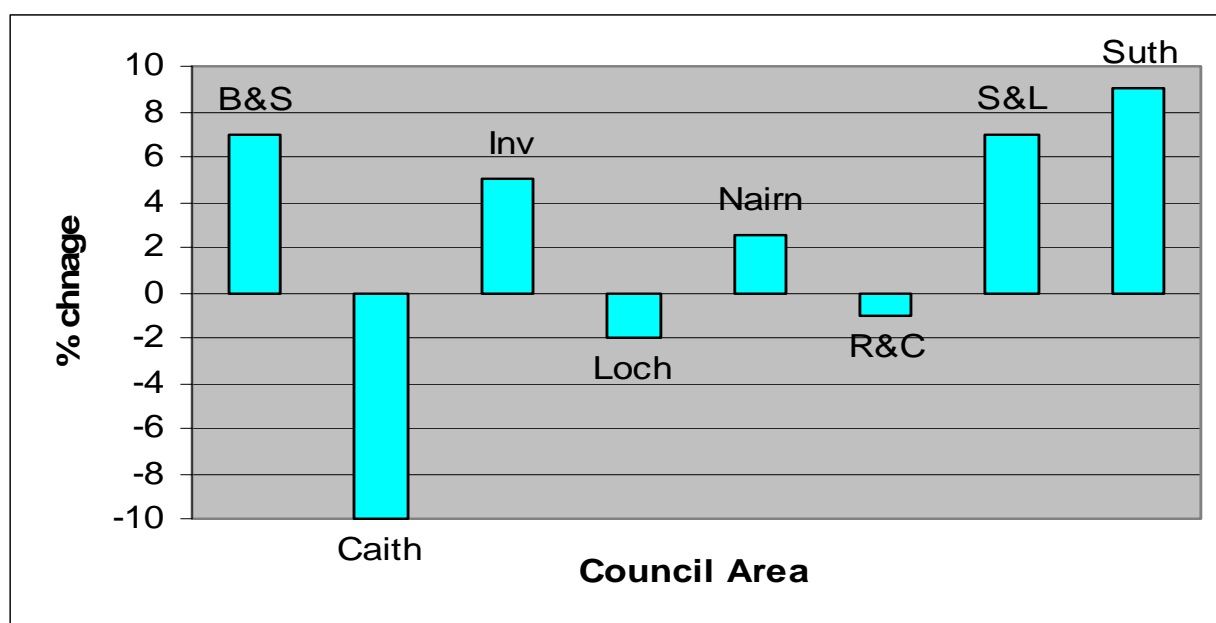


Figure 10.1 Population Changes 1998-2016, Council Areas Highlands

Source: GRO(S) 1998 Projections

10.6.30 Projections compiled by the Highland Wellbeing Alliance Intelligence & Monitoring Group (I&M Group) contradict the population projections in Highland compiled by GRO(S), and are in line with the anticipated fall in population for Scotland overall. According to these projections Highland's overall population will fall by 4.3 % to 199,958 by 2017.

10.6.31 The fundamental reason for this reduction is the number of deaths each year outnumbering the number of births, leading to a natural decline in the population. The net migration of 100 people each year is not enough to cancel out the natural decline in population (Table 10.12).

10.6.32 I&M Group calculated its own projections of the population change between 2001 and 2017 for the eight council areas of Highland (Figure 10.2). Badenoch & Strathspey, according to this projection is forecasted to experience the lowest population decline (1.4 %) with Sutherland experiencing the greatest (17.2 %). The only area expected to see a rise in population between 2001 and 2017 is Inverness. These projections run contrary to the GRO(S) projections which predict that Badenoch & Strathspey will see a rise in population.

10.6.33 I&M Group also produced population projections by Council Area and age group for the whole of Highland (Figure 10.3). The number of people in the first three age categories (0-15, 16-24 and 25-44) are all forecasted to fall in Highland, by 2017. The decrease in population among these age groups is matched by an associated increase in the older age categories (45-64, 65-74 and 75+) as the population of the Highland ages. Without the sufficient number of births and in-migration to offset this process the overall Highland population is predicted to fall by 4.3 %.

Table 10.10 Components of Population Change, Highland, 2001 - 2017

Year	Births	Deaths	Natural Change	Net Migration	Natural Change & Migration
2002	2,155	2,291	-136	100	-36
2003	2,161	2,412	-250	100	-150
2004	2,127	2,417	-290	100	-190
2005	2,080	2,422	-343	100	-243
2006	2,033	2,429	-396	100	-296
2007	1,988	2,441	-453	100	-353
2008	1,947	2,454	-506	100	-406
2009	1,910	2,455	-544	100	-444
2010	1,879	2,477	-598	100	-498
2011	1,851	2,485	-634	100	-534
2012	1,826	2,505	-679	100	-579
2013	1,802	2,526	-723	100	-623
2014	1,783	2,547	-764	100	-664
2015	1,766	2,568	-802	100	-702
2016	1,750	2,590	-841	100	-741
2017	1,734	2,614	-880	100	-780

Source: Highland Wellbeing Alliance Intelligence & Monitoring Group Population and Household Projections, May 2004

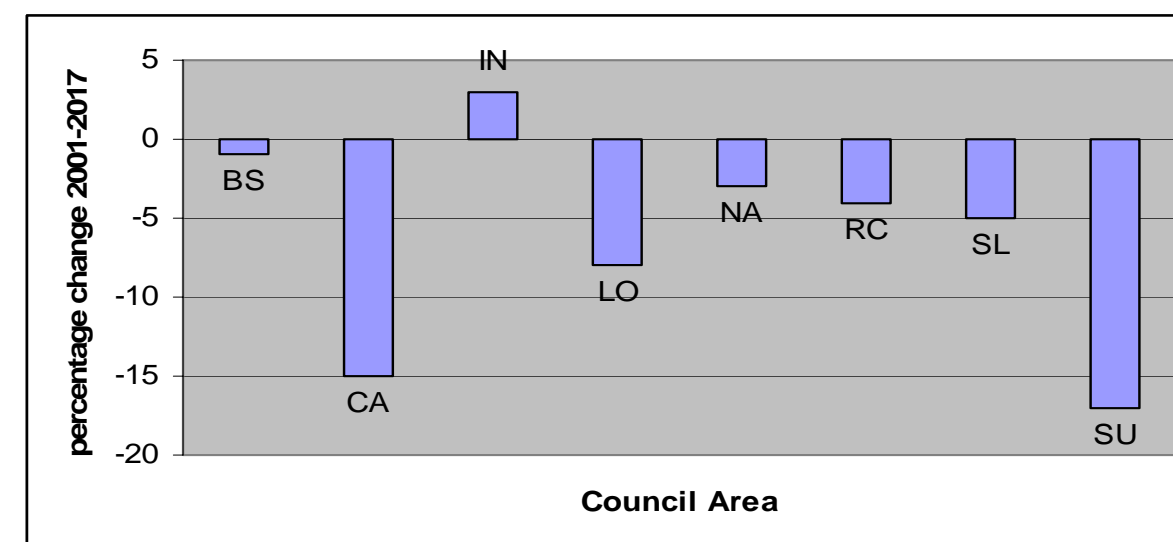


Figure 10.2: Population Change 2001-2017 (2001 I&M Group Pop Projections)

Source: Highland Wellbeing Alliance Intelligence & Monitoring Group Population and Household Projections, May 2004

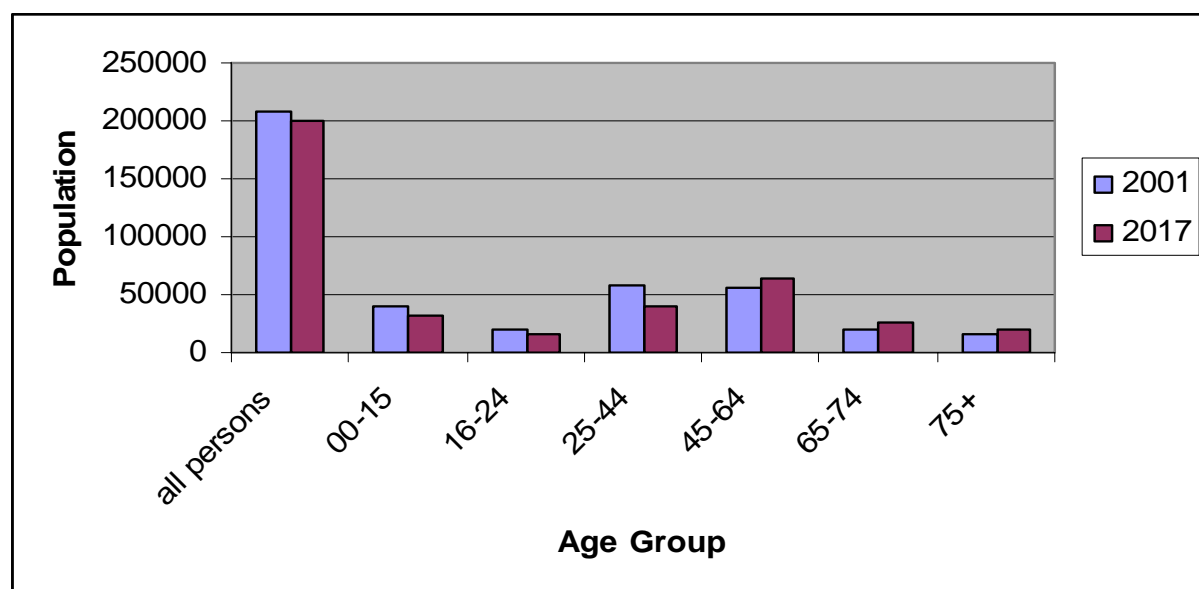


Figure 10.3: Highland Population Change 2001-2017

10.6.34 At district level I&M projections (Figure 10.4) show the same trend in demographics for Badenoch & Strathspey as for the Highlands. I&M predicted a fall in population of 1.4 % and predict an increase in the areas dependency ratio by 2017.

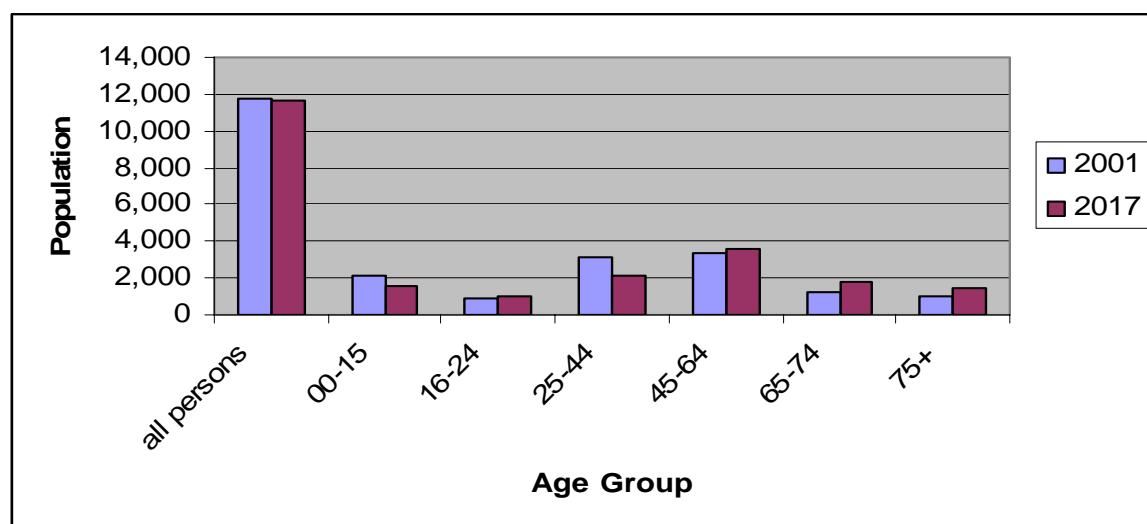


Figure 10.4: Badenoch & Strathspey Population Change 2001-2017

10.6.35 In terms of population projections for the Cairngorms National Park area, CNPA has also produced projections to 2025.<sup>20</sup>

10.6.36 Table 10.11 shows that the area's population is forecast to grow by 8.9 % over the period to 2025, with a decline in the younger age groups and an increase in the 60yrs+ age groups.

Table 10.11: Population Change by Age Group – CNP Area (2001-2025)

Age	2001	2006	2011	2016	2025	% change 2001-2025
0-15	2,853	2,741	2,457	2,056	1,891	-33.7%
16-24	1,240	1,337	1,439	1,529	1,110	-10.5%
25-39	2,988	2,463	1,946	1,797	2,075	-30.6%
40-59	4,687	5,188	5,432	5,377	4,381	-6.5%
60-74	2,659	3,012	3,672	4,213	4,923	85.1%
75+	1,408	1,543	1,697	1,917	2,858	103.0%
<b>Total</b>	<b>15,835</b>	<b>16,284</b>	<b>16,642</b>	<b>16,889</b>	<b>17,238</b>	<b>8.9%</b>

### Household Projections

10.6.37 The Scottish Executive is the main source for data on the number of households in Scotland. Projections show that the number of households will continue to increase in both Scotland and the Highlands, and that the rate of increase in the Highlands will be lower than for Scotland.

10.6.38 Household projections are not available sub Highland Council Level but the I&M Group used population projections for Council Areas to provide a basis for household projections. This showed that the composition of households is expected to change. The number of households consisting of 2 or more adults in 2017 will be 14 % of the total in 2017, compared to 23 % in 2001. Single person households on the other hand represent the greatest increase of more than 30 % over the same period. Overall they will account for 38% of all households.

10.6.39 The rate of household change varies across the eight council areas, similar to the population forecasts. Between 2001 and 2017 the household change in Badenoch & Strathspey is projected to rise by 10%.

10.6.40 The CNPA household projections, upon which the CNPA planning policy and strategy are based, are set out in Table 10.12 below. These projections are broadly similar to that produced

<sup>20</sup> Population and Household Projections for the Cairngorms National Park Authority: CSSR University of Manchester (December 2005)

<http://www.cairngorms.co.uk/resource/docs/publications/27072006/CNPA.Paper.283.Population%20and%20Household%20Projections.pdf>

by the I&M Group but cover a different geographic area in terms of the CNP. These projections show a forecast growth in households, slightly less than twice the rate of increase projected by the I&M Group.

**Table 10.12: Household Projections by Type – CNP Area (2001-2016)<sup>21</sup>**

Household Types	2001	2006	2011	2016	% change 2001-2016
1 Person	2,148	2,412	2,729	3,066	+42.7%
2 Person all adult	2,331	2,591	2,912	3,250	+39.4%
Lone Parent	305	330	344	351	+15.2%
3+ adult	6,26	600	573	541	-13.6%
2+ adults with children	1,521	1,419	1,257	1,083	-28.8%
<b>All Households</b>	<b>6,931</b>	<b>7,352</b>	<b>7,816</b>	<b>8,290</b>	<b>19.6%</b>
Private Household Population	15,292	15,741	16,099	16,346	+6.9%
Average Household Size	2.21	2.14	2.06	1.97	-10.6%

### Socio-Economic Summary

**10.6.41**The following sets out in summary the key issues which apply to the wider area in socio-economic terms and create the context within which An Camas Mòr would be set, and would frame the profile and format of the new community:

- Aviemore has a healthier population structure compared to Badenoch & Strathspey and Scotland;
- Aviemore also has a higher economic activity rate than both Badenoch & Strathspey and Scotland arising mainly from its significantly higher level of people in full-time employment;
- However, despite its high economic activity rate the area has a higher unemployment rate compared to Badenoch & Strathspey and Scotland;

<sup>21</sup> Population and Household Projections for the Cairngorms National Park Authority: CSSR University of Manchester (December 2005)

<http://www.cairngorms.co.uk/resource/docs/publications/27072006/CNPA.Paper.283.Population%20and%20Household%20Projections.pdf>

- The economy is relatively narrow compared with Scotland as a whole, and broadly similar to Badenoch & Strathspey although it is more dependent on key tourism sectors;
- According to the Cairngorms National Park's Strategy and Action Plan for Sustainable Tourism "tourism related businesses are estimated to account for 80 % of the economy";
- Aviemore has a high proportion of elementary jobs which are generally low paid and do not require significant levels of skills or qualifications;
- Aviemore has a notably higher proportion of rented accommodation relative to Badenoch & Strathspey and Scotland;
- Educational attainment levels in Aviemore are weaker than Badenoch & Strathspey and Scotland, but would be improved by the retention of educated population and skills through the provision of higher value jobs and affordable housing via An Camas Mòr; and
- At a wider level, Badenoch & Strathspey Council area is the least deprived in the highlands with zero data zones in the most deprived 20 %.

**10.6.42**In summary, the economy of the Aviemore / Speyside area is characterised by a lower income profile with an above average dependency upon of tourism and leisure, hotels and catering, and land based / estate orientated employment, and a lower than average representation of personal and professional services.

**10.6.43**This is set within the context of the recognition by CNPA in the Park Plan that an "increasing proportion of economic activity will be based on the special qualities of the Park" with a five-year outcome resulting in an increase in employment in lower wage sectors of tourism, land-based, and food & drink.

**10.6.44**However of key significance are the jobs potentially available in the area and their mismatch with the lack of locally available skilled and appropriate labour, largely as a result of the lack of local affordable housing.

### An Camas Mòr Socio-Economic Rationale and Profile

**10.6.45**The following section sets out the basis of the assumptions for the future socio-economic profile and employment mix of An Camas Mòr.

### The Inter-dependency between Population, Housing and Employment

**10.6.46**Any settlement – established or proposed - is composed of a range of possible employment types and also the reasons for households being resident in the settlement, in terms of generic categories.

**10.6.47**In terms of the economic rationale for the choice of 'primary residence' housing location, these can be categorised as one of the following types:

- Local demand from indigenous population;
- In-migrant demand – those taking up jobs;
- In-migrant demand – those creating jobs;
- In-migrant demand – those commuting to & from jobs elsewhere; and
- In-migrant demand - retirement & non–economically active & coming to live near their relatives.

**10.6.48** However, what should be appreciated is that the business / economic base and housing markets are inextricably linked, and hence those households both resident and working in the settlement would be involved in one of the following three categories of job / employment.

**10.6.49** Firstly there are lower income households and essential workers – whether employed locally within the settlement or employed within other settlements or facilities within the surrounding area - which are likely to be accommodated within affordable or social housing.

**10.6.50** Secondly there are basic / support employment, which provide the necessary local services which would sustain community activities within the settlement, as follows:

- Higher value professional services required by the new local population;
- New local services provision; and
- Expansion of existing businesses in the wider area to service and maintain the new and increased local population.

**10.6.51** Third and finally there are non–basic / support employment, which provide for wider economic activities, but are not essential in supporting local community activity and essential services, as follows:

- Self–employed & those households who might start businesses & employ others locally – generating local value added;
- Attraction of entrepreneurial activity and new business starts;
- Attraction of new investment into the new settlement using An Camas Mòr as a base / location and attracted by:
  - Availability of workspace & business premises;
  - Availability of natural and other resources;
  - Availability of skills & labour force;
  - Availability of educational connections or networks;
  - Proximity to supplies / suppliers & centrality in or appropriate to markets for goods and services; and

- High quality surroundings & environment.

**10.6.52** Much depends upon the rationale, theme, or concept of the development, which in this development would be based upon the principles of sustainability, environmental awareness and sensitivity, high quality of life, renewable technologies; and addresses where possible local socio-economic and community aspirations, needs and requirements, particularly of the existing Aviemore and Badenoch & Strathspey community.

**10.6.53** The socio-economic rationale for the new development would focus upon the uniqueness of An Camas Mòr, a unique settlement, and the only new settlement to be developed in any National Park in the UK. In keeping with the uniqueness of the Cairngorms National Park, which is characterised by its various 'special qualities', to achieve the objective of creating a sustainable settlement would require many things, including provision of the maximum number of locally based job opportunities, reduction of commuting to / from work and home, the minimisation of the carbon footprint of new buildings via the latest environmental technology, ensuring the highest energy efficiency, and encouraging high value economic activities and investment, with the least carbon footprint – developing a 'green and clean economy' and technology and research based jobs. Similar examples of this form of high value and clean economy are to be found in Scandinavia and the USA, and also on a modest scale indications are that this strategy is working locally at the Forres Enterprise Park.

**10.6.54** In terms of this wider and local socio-economic context, the need is very much to provide opportunities to access affordable housing, encourage and attract new skills, talent and labour to locate in the area - to both satisfy available job opportunities and to provide new investment / jobs - and to ensure that An Camas Mòr acts as a driver for continuing sustainable economic development, enhanced economic diversity, and greater prosperity in the Aviemore / Speyside area.

**10.6.55** In that regard, the concept of the new village is one of a high quality living, working, and playing environment, with extensive opportunities for living and working in close proximity, and to minimise the need for commuting into and out of the village. This would be achieved through the provision of employment space in live / work units in larger houses; commercial and studio space on, around, and to the rear of the High Street, and on individual sites elsewhere in the village.

**10.6.56** Employment would be generated in a diverse range of economic sectors but would particularly exploit the potential of working from home, remote and connected working, high value service based activities; and the high quality National Park location is intended to be targeted at and attractive to entrepreneurial individuals, the self-employed, and others who are likely to start businesses and bring new investment into the area, and indeed the attraction of existing businesses themselves. Equally the affordable housing within the village would provide accommodation for both existing lower paid workers in the area, who currently are obliged to commute or live locally in inadequate accommodation, and also essential workers in the support, retail, and community services required by the village.

## Employment Structure

**10.6.57** The Aviemore area and Badenoch & Strathspey currently possesses a number of high Value Added businesses located in the area as a result of the high quality of life and environment. The development of An Camas Mòr aims to build upon this economic base and encourage a more

diverse range of businesses and economic activities to add to the already strong presence of tourism and land-based businesses.

**10.6.58** It is intended that this potentially would create new and additional employment, raise wage levels as a result of the development of R+D and other higher-value, high-technology type employment in contrast with the generally lower wage-based economic activities which make up a significant element in the local economy at present. Market evidence demonstrates that while tourism and land-based employment provides 'access-level' jobs for the lower and medium-skilled population, encouragement of higher-value and higher-technology jobs provides a means of diversifying the economy, makes it more resilient to cyclical economic trends and pressures, and raises the level of disposable income spent upon goods and services in local services and facilities, providing a virtuous cycle in supporting the local economy.

**10.6.59** This is intended to transform the perception of the whole area, to diversify the economy into higher paying employment, to create and induce more employment and to provide critical mass to support public services such as transport; and hence An Camas Mòr would offer the potential to act as a destination within a rural area – a 'hub' within Badenoch & Strathspey and the National Park area, while also servicing the surrounding villages.

**10.6.60** Examples of successful business development and business parks elsewhere have shown that high growth businesses in the "knowledge - based economy" are attracted to a high quality setting, which would be provided in An Camas Mòr. In addition, while there might be potential to encourage the location of small scale inward investment of high-technology and learning prospects into the area, if this is to occur the right type of business accommodation and workspace is required, hence the rationale for the development as set out above.

**10.6.61** However, not only is An Camas Mòr intended to create, induce, and attract new investment, it would also offer prospects of expansion of existing businesses in the wider area to service and maintain the new and increased local population, and their economic activities and community facilities.

**10.6.62** Table 10.13 sets out the basis of the assumptions used in establishing the potential employment profile and mix, making use of local profile data, industry standard benchmarks, and matching these to the rationale for the development.

**10.6.63** What this also illustrates is the mix and profile of a target 'balanced community' where the local economically active population equals that of locally based job opportunities.

### **Assumptions used in Estimation of Target Employment Mix**

**10.6.64** The following assumptions have been used in establishing the new and additional employment mix estimation shown in Table 10.13.

**10.6.65** Total population is derived from the programmed household numbers and an average household size applied. The average is taken from the General Register Office for Scotland (GRO(S)) population projections for 2024, adjusted for the expectation of larger households with couples and children. This is taken as greater than the average household size for 2024 from GROS estimated to be 2.0, which are the longest timescale population projections currently available.

**10.6.66** The number of Economically Active of the total population is based upon the Population Census 2001 figures. The average figure at 2001 for Scotland Aviemore was 51.9 %, and it is assumed that due to the nature of the population attracted to and accommodated within An Camas Mòr would be some 10 % higher than the average or 56.9 % and also reflecting the higher Economic Activity Rate in Aviemore than either Badenoch & Strathspey, or Scotland.

**10.6.67** To establish a figure for those economically active who would work from home, this is based upon TUC Research figures (2008) assuming the average UK figure of those working from home as a % of people in work to be 12.2 %, and this having increased by 4.3 % per annum over the previous several years. Assuming this rate of increase is sustained on a 'straight line' basis, the figure for 2030 would be c28 %. It has been further assumed that 50 % of all those people working from home would also employ one other person, representing overall the equivalent of 42 % of the total local economically active population. This is further backed up by research<sup>22</sup> which demonstrates that home base businesses now account for c28 % of employment in the UK, and that 60 % of new business start ups are started from home. In addition, research demonstrates that the levels of home working are higher than average in rural and more remote areas, appropriate to An Camas Mòr.

**Table 10.13: Estimation of Target Employment Mix for Balanced Community**

<sup>22</sup> Home Business Report – Enterprise Nation (October 2007)

Factor & Job Type	Value	Source
Total Households	1,500	Project Programme
Household Size	2.25	GRO(S)
Total Population	3,375	
Economic Activity Rate of all Population	56%	Aviemore - Census 2001
Economically Active Population	1,920	
2 <sup>nd</sup> Home Population	192	Assumed 10 %
Local Economic Active Population	1,728	
Working from Home (Single person)	484	28 % based on TUC data
Working from Home (2 <sup>nd</sup> worker)	242	Assumes 50 % of single
Sub-total	1,002	
Hotel	40	Industry average
Primary School – twin stream	40	Standard provision
Nursing / Retirement Home	75	Investor interest
Sub-total	847	
Shops + Commercial Premises on High Street	180	Assumes average 10 m <sup>2</sup> per job
Sub-total	667	
Essential + existing workers in affordable housing	432	Assumes 25 % of 1,728 as AH policy
Sub-total	235	

Studio + other commercial space (Total 4,550 m <sup>2</sup> )	225	Assumes average 20 m <sup>2</sup> per job
Longer Distance Commuters	10	Nominally balanced community of population = local job opportunities

**10.6.68** However, while this represents a challenging target for the new village, the rationale of An Camas Mòr is that of a sustainable settlement in the National Park, where the environmental effects are acceptable; and in which people would enjoy living, working, playing, and visiting. Hence the nature of the village with an extensive number of live + work units, studios and mews type employment accommodation, is designed to maximize living and working locally, and minimise the need for commuting trips to outside the area. Thus a significant proportion of the local economically active population being defined as home-working, using ICT to enable activity, is taken to be an achievable target for An Camas Mòr.

**10.6.69** The hotel and primary school are facilities which are assumed to be required within the new settlement, and job figures are taken from industry standards. The potential nursing / retirement home figures of employment have been derived from the stated market interest in locating such a facility in the new settlement. It has also been assumed that there would be provision of approximately 1,800 m<sup>2</sup> of shops / commercial premises in the High Street, and an average employment density of 10sqm per job has been assumed. This scale of floorspace is derived from the An Camas Mòr Approximate Area Calculations spreadsheet.

**10.6.70** While the numbers of essential workers could ideally be estimated from a 'bottom up' approach, it has been assumed that the policy on 'affordable housing' would provide a guide as to the scale of numbers additional to those facilities already included. The assumption is that the policy for % of affordable housing is taken to be 25 % of housing stock. Hence, this has been taken to be 25 % of housing units occupied by the economically active population.

**10.6.71** In estimating the number of workers which are likely to be accommodated within the studio and other commercial employment space, it is assumed that this would extend to c4,550 m<sup>2</sup> of space (derived from the An Camas Mòr Masterplan). Assuming that each job requires an employment density of 20 m<sup>2</sup> per worker, this represents 225 jobs.

### Levels of In / Out Commuting - The Context of Living and Working Locally

**10.6.72** In estimating the potential levels of in-commuting and out-commuting which might occur at An Camas Mòr, in practice a number of the economically active members of the population of the village would be likely to commute in / out of the village for employment. Indeed some of the population would always wish to travel to work away from where they live, and it is not possible to proscribe where local households work, other than to encourage them to live and work locally through the opportunities available within the village, the nature of the facilities and infrastructure, and the quality of life, etc.

**10.6.73** In practice, a number of the economically active members of the population of the village would likely commute in / out of the village for employment. Table 10.14 demonstrates the likely nominal real-world level of commuting where a job is expected / assumed to be taken by an 'in-commuter' then an equivalent number of the local economically active population would commute out for employment.

**10.6.74** This estimation attempts to provide some understanding of the potential ‘gross’ commuting flows into and out of the village, while targeting an optimum position of sustainable working patterns and minimum commuting flows, with longer distance commuting limited to minimal levels of the local economically active population.

**10.6.75** It is however accepted that those economically active within the population of An Camas Mòr would have the option of working either within the village or also outside, the latter whether in the surrounding area of Aviemore and the towns and villages of Strathspey, or indeed further afield, most likely in the wider Inverness area. However, the concept of An Camas Mòr is one of an active sustainable settlement with the attraction being one of living and working in close proximity, not that of a residential / commuting or 2<sup>nd</sup> home type of settlement. It is also accepted that it is unrealistic to proscribe such development or occupation, but rather the promotion and marketing of opportunities to live and work in An Camas Mòr would heavily favour the locally based live / work position and discourage longer distance commuting or 2<sup>nd</sup> homes.

**10.6.76** Thus it is estimated that the nominal out-commuting would represent 691 of the economically active population and the nominal in-commuting 249 of the economically active population. This estimation indicates a ‘worst case’ of a 15 % commuting level plus the local commuting of essential workers, and the explanation of the underlying factors is set out in Table 10.4.

**10.6.77** In understanding the assumptions used in Table 10.4, the other key issue is that An Camas Mòr is planned to address the issue of a shortage of affordable housing in Badenoch & Strathspey as one of its key objectives. Hence those of the economically active population accommodated within the affordable housing or those who are essential workers by definition would largely already have jobs in the surrounding area, in Aviemore and the surrounding villages.

**10.6.78** As An Camas Mòr is designed to address the issue of the existing pent up demand for such housing, and hence ease constraints on recruitment, on economic growth, and on relieving housing problems, all which are recognised by the National Park Authority, plus is aiming to attract new young families etc, the vast majority of these jobs would largely not be within there village. Therefore affordable housing occupiers within An Camas Mòr would have to travel to their job by some mode of transport. A limited proportion of the essential workers in the village’s primary school, nursing home, and shops would also be accommodated within these other employment categories.

Table 10.14: Estimation of Jobs by Commuting Source

Source of Commuting	Out
Longer distance commuting (out of An Camas Mòr + Aviemore)	10
Essential workers in Affordable housing	432
Working from home 2 <sup>nd</sup> worker employed (10 %) – jobs filled by in-commuters	24
Hotel + School + Nursing Home (50 %) – jobs filled by in commuters	77
Studios + commercial premises (50 %) – jobs filled by in-commuters	112
Shops on High Street (20 %) – jobs filled by in-commuters	36
Total	691
Source of Commuting	In
Working from home 2 <sup>nd</sup> worker employed (10 %)	24
Hotel + School + Nursing Home (50 %)	77
Studios + commercial premises (50 %)	112
Shops on High Street (20 %)	36
Total	249

**10.6.79** From a socio-economic & community perspective this would fit well with the aim of seeing the new village’s development and the surrounding area as an integrated economy with An Camas Mòr supporting the overall Badenoch & Strathspey area. Hence c25 % of the economically active population would be likely to travel – but only relatively ‘locally,’ to the existing (and in the future developing) community facilities in the surrounding area.

**10.6.80** An Camas Mòr would aim to achieve lower than ‘worst case’ commuting levels of 15 %, which in turn would be lower than the 2001 Census local average for commuting in / out of Aviemore. The target of a virtually balanced community, with a job available locally for each economically active member of the population, and a 1 % commuting level would be extremely challenging, but not impossible with the establishment and promotion of the concept of the An Camas Mòr sustainable community.

## Overall Socio-Economic Benefits

**10.6.81** The overall quantitative socio-economic benefits derived from the development of An Camas Mòr, have been assessed and estimated within the An Camas Mòr Socio Economic Impact Report, and are set out in Table 10.15 below. These would make a significant positive contribution to the prosperity and wellbeing of both the Badenoch & Strathspey area and the Highlands.

Table 10.15: Overall Additional Quantitative Socio-Economic Impacts

Socio-Economic Impact	Total
Gross Jobs (FTEs)	1,728
Net Additional Local Jobs (FTEs) – TTWA	1,171
Net Additional Local Jobs (FTEs) – Scotland	1,330
Growth in GVA – TTWA (per annum)	£16.4-21.4m
Growth in GVA – Scotland (per annum)	£18.6-24.3m
Tax Revenue – Business (per annum)	£1.148m
Tax Revenue – Residential (per annum)	£3.124m
Retained Retail Expenditure (per annum)	£2.942m
Affordable Housing (units)	375
Construction Jobs (FTEs)	N/A
Private Sector Investment (£m)	N/A

## Community Facilities Assessment - Community Facilities Audit

**10.6.82** The following section sets out the audit of existing community facilities.

**10.6.83** Public halls and community centres located within a relatively close distance to the proposed settlement include<sup>23</sup>:

- Aviemore Village Hall;
- Boat of Garten Community Hall;
- Carrbridge Village Hall;
- Dulnain Bridge Village Hall;
- Kincaig Community Hall;
- Laggan Village Hall;

<sup>23</sup> Information on village and community halls provided by Highland Council website - <http://www.highland.gov.uk/learninghere/communitylearning/meetingfacilities/>

- Nethybridge Community Centre;
- Newtonmore Village Hall; and
- Talla nan Ros, Kingussie.

**10.6.84** Museums, Theatres and Galleries located within a relatively close distance to the proposed settlement include<sup>24</sup>:

- Badenoch Centre, Kingussie – performance and function space, small conference facilities, library and youth room;
- Clan Macpherson Museum, Newtonmore;
- Grantown Museum, Grantown-on-Spey;
- Iona Gallery, Kingussie; and
- The Highland Folk Museum, Kingussie and Newtonmore.

**10.6.85** Sports facilities, including games halls, leisure centres, and swimming pools located within a relatively close distance to the proposed settlement include<sup>25</sup>:

- Craig McLean Leisure Centre, Grantown-on-Spey – sports halls, gym and swimming pool. Council-run;
- Badenoch Centre, Kingussie – sports halls and gym. Council-run;
- McDonald Highland Resort – swimming pool. Council-supported;

**10.6.86** Libraries located within a relatively close distance to the proposed settlement include<sup>26</sup>:

- Aviemore Library, Aviemore;
- Badenoch Library, Kingussie;
- Grantown-on-Spey Library, Grantown-on-Spey; and
- Moray Firth Mobile Library Service – which can stop at primary schools, residential homes, community halls and village centres.

<sup>24</sup> Information on museums, theatres and galleries provided by Highland Council website – <http://www.highland.gov.uk/leisureandtourism/what-to-see/museums/> and <http://www.highland.gov.uk/leisureandtourism/what-to-see/arts/artgalleries/>

<sup>25</sup> Information on sports facilities provided by Highland Council website - <http://www.highland.gov.uk/leisureandtourism/sportsfacilities/> and

<sup>26</sup> Information on libraries provided by Highland Council website - <http://www.highland.gov.uk/leisureandtourism/libraries/yourlocallibrary/> and <http://www.highland.gov.uk/leisureandtourism/libraries/mobilelibraryservice/morayfirthmoblib.htm>

10.6.87 Post offices located within a relatively close distance to the proposed settlement include:

- Aviemore;
- Boat of Garten;
- Carrbridge; and
- Kincaig.

### Education Facilities

10.6.88 Education facilities located within a relatively close distance to the proposed settlement include<sup>27</sup>:

#### Primary School Provision

- Abernethy Primary, Nethybridge;
- Alvie Primary, Kincaig;
- Aviemore Primary, Aviemore;
- Carrbridge Primary, Carrbridge;
- Dalwhinnie Primary, Dalwhinnie;
- Deshar Primary, Boat of Garten;
- Gergask Primary, Laggan Bridge, Newtonmore;
- Grantown Primary, Grantown-on-Spey;
- Kingussie Primary, Kingussie; and
- Newtonmore Primary, Newtonmore.

Table 10.16: Primary School Capacity, Rolls and Surplus for 2007/2008

Primary School	Capacity	School Roll	Surplus
<b>Abernethy primary</b>	96	<b>80</b>	17 % (16)
<b>Alvie primary</b>	47	<b>50</b>	-6 % (-3)
<b>Aviemore Primary</b>	252	<b>229</b>	9 % (23)
<b>Carrbridge primary</b>	96	<b>53</b>	45 % (43)
<b>Dalwhinnie Primary</b>	19	<b>5</b>	74 % (14)
<b>Deshar primary</b>	71	<b>45</b>	37 % (26)
<b>Gergask Primary</b>	47	<b>20</b>	57 % (27)
<b>Grantown Primary</b>	<b>306</b>	<b>262</b>	<b>14 % (44)</b>
<b>Kingussie Primary</b>	<b>171</b>	<b>147</b>	<b>14 % (24)</b>
<b>Newtonmore Primary</b>	<b>145</b>	<b>61</b>	<b>58 % (84)</b>

Source: Highland Council

#### Secondary School

- Kingussie High School, Ruthven, Kingussie; and
- Grantown Grammar School, Grantown.

Table 10.17: Secondary School Capacity, Rolls and Surplus for 2008/9

Secondary School	Capacity	School Roll	Surplus
<b>Grantown Grammar School</b>	<b>350</b>	<b>400</b>	<b>-14 % (50)</b>
<b>Kingussie High School</b>	<b>475</b>	<b>419</b>	<b>18 % (56)</b>

Source: Highland Council

#### Special School

- Drummond School, Inverness – has a school roll of 99.

<sup>27</sup> Information on education related community facilities provided by Highland Council website - <http://www.highland.gov.uk/learninghere/schools/>

**10.6.89** Early years centres and childcare within a relatively close distance to the proposed settlement include<sup>28</sup>:

- Abernethy Nursery, Nethy Bridge;
- Aviemore Community Children's Group, Aviemore;
- Aviemore Nursery, Aviemore;
- Aviemore Parent and Toddler Group, Aviemore;
- Carrbridge Baby and Toddler;
- Carrbridge Nursery, Carrbridge;
- Deshar Nursery, Boat of Garten;
- Gergask Nursery, Laggan;
- Grantown Nursery, Grantown-on-Spey;
- Grantown Playgroup, Grantown-on-Spey;
- Groove (Grantown), Grantown-on-Spey;
- Kingussie Nursery, Kingussie;
- Kingussie Parents, Baby and Toddler;
- Newtonmore Nursery, Newtonmore;
- Newtonmore Out of School Club; and
- The Funhouse, Coylumbridge, Aviemore.

### Health Related Facilities

**10.6.90** Health facilities located within a relatively close distance to the proposed settlement include<sup>29</sup>:

- Primary Medical Provision – GP Surgeries;
- Aviemore Medical Practice;
- Kingussie Medical Practice;

<sup>28</sup> Information on early years centres and child care provided by Scottish Childcare website - <http://www.scottishchildcare.gov.uk/FindChis.aspx>

<sup>29</sup> Information on health related community facilities provided by the NHS Highland website - <http://www.nhshighland.scot.nhs.uk/Services/Pages/ServiceDefault.aspx>

- Grantown-on-Spey, The Health centre; and
- Newtonmore, Gergask Surgery.

### Secondary Medical Provision – 6 Hospitals

- St. Vincent's Hospital, Kingussie; and
- Ian Charles Community Hospital, Grantown-on-Spey.

### Dentists

- Aviemore, Criag-na-Gower Avenue;
- Aviemore, Dental Clinic; and
- Grantown-on-Spey, Morlich House.

### Pharmacies

- Aviemore Pharmacy;
- Kingussie, P Grant; and
- Grantown-on-Spey, Clark Munro.

### Opticians

- Aviemore Opticians.

## 10.7 Community Facilities Impact Assessment

**10.7.1** This Community Facilities Impact Assessment demonstrates the compatibility between the requirements of the proposed development and the existing and proposed facilities.

**10.7.2** Additional facilities contained within the proposed development would satisfactorily supply and support the needs and requirements of the new village throughout the development. Only with the exception of secondary schooling in the later phases of development post-10 years is the position uncertain in that THC's programme for secondary schooling is currently undecided.

### Future Community Facilities and Affordable Housing

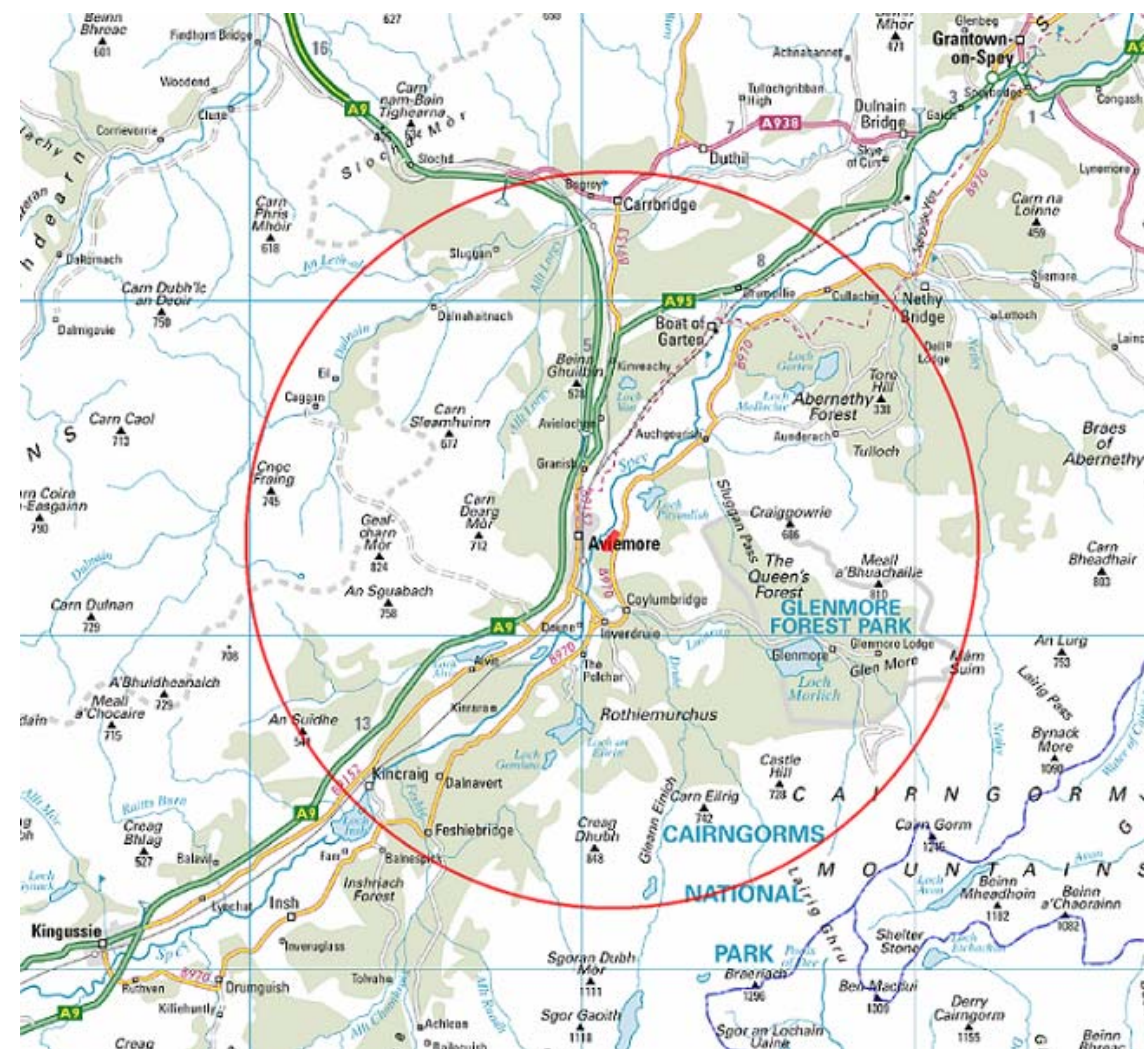
**10.7.3** A new primary school is planned and programmed for Aviemore, which would absorb all demand from An Camas Mòr until Phases C and D of the development, after which additional local village provision would then be required. To date no indications have been provided by THC that there would be any new secondary school provision for a period of at least 10 years, other than those already provided. Therefore, only in the later stages of the programmed phasing of development might this be considered as a requirement.

- 10.7.4 An Camas Mòr is also unlikely to be in a position to duplicate the higher level local services provided by Aviemore including a garage / petrol filling station, bank, post office, health centre, and supermarket etc, until over 1,000 houses are occupied, representing a population of approximately 2,000-2,200.
- 10.7.5 However, within the intervening period, it is likely that more basic community services would be provided at lower levels of population including perhaps a mini-market / convenience store, youth café, and also early year childcare provision, likely when 300-400 houses are occupied, or a population of 600-800.
- 10.7.6 The Cairngorms National Park Local Plan estimates that there is a total housing requirement in the National Park area for 1,640 dwelling units over the period 2006–2016, of which 85 % will be in Badenoch & Strathspey. To help meet this need land is allocated at An Camas Mòr for 1,500 homes over 20–25 years, with 400 during the period up to 2016, and 1,100 thereafter.
- 10.7.7 Further the Local Plan estimates a need to provide up to 132 new affordable dwelling units per annum in the Park area, and as with overall housing need, the bulk of this will be in Badenoch & Strathspey.
- 10.7.8 It is the intention to ensure provision of at least the national policy requirement of 25 % of all housing in An Camas Mòr should be affordable, and such affordable housing would be interspersed throughout the village; and a target would be set for 100 affordable homes to be completed within the first five years of the proposed development.

### 10.8 Tourism & Recreation Assessment - Background Context

10.8.1 The survey area for assessment within the vicinity of the proposed settlement was taken to be up to and including those areas within a 10 km radius of the settlement, which is shown in Figure 10.5. This assessment area was defined on the basis that experience has shown that the visual significance of development within a landscape can be directly related to its proximity or distance from a given viewpoint, and that its visual significance decreases substantively at the threshold points of 5 km and 10 km from the development. This area includes the settlements of:

- Aviemore (c0.25 km);
- Boat of Garten (c5 km);
- Carrbridge (c9 km); and
- Kincaig (c9.5 km).



**Figure 10.5 Map of the Study Area**  
**Source: RTP GIS – Digital Map Data © Collins Bartholomew Ltd 2008**

- 10.8.2 The Aviemore, Badenoch, Strathspey and Cairngorm area is one of a high-quality natural environment which is a well established destination for visitors, and it is generally agreed in most documents that it is the quality of the landscape of the area that is the primary reason for the majority of visits to the area.
- 10.8.3 The socio-economic chapter revealed the tourism industry to be the area’s principal economic driver, directly or indirectly accounting for a significant portion of the area’s jobs. This section provides a review of the area’s tourism sector.
- 10.8.4 An Camas Mòr would be developed within the Cairngorms National Park,<sup>30</sup> and therefore is likely to benefit along with a large part of Badenoch & Strathspey from new market opportunities for sustainable business tourism within the Park. The following data sources were used to review tourism in the area:

<sup>30</sup> The Cairngorm National Park was created in 2003 and is the UK’s largest National Park. The Park is home to 16,000 people and includes forests, rivers, lochs, glens and moorlands.

10.8.5 The Scottish Tourism Economic Activity Monitoring (STEAM) report for the Cairngorms National Park area (2007); and the Cairngorms National Park Survey (2003/04) - Tourism Volume and Value.

### Tourism Volume and Value

10.8.6 Total tourist revenue in the Cairngorms National Park decreased by 6% from 2006-2007 (Table 10.18). Badenoch & Strathspey's share was almost static with just over 79.6 % of the total tourism revenue in the Cairngorms National Park in 2006 and marginally below 80 % in 2007.

Table 10.18: Total Revenue by District (£m)

	2007	2006	% Change
<b>Badenoch &amp; Strathspey</b>	<b>137.52</b>	<b>148.26</b>	<b>-7</b>
<b>Rest of Park</b>	<b>36.60</b>	<b>37.96</b>	<b>-4</b>
<b>Total</b>	<b>174.11</b>	<b>186.21</b>	<b>-6</b>

Source: STEAM Report 2007

10.8.7 The following tourism analysis continues with a comparison of Badenoch & Strathspey with the overall National Park area in terms of percentage change for each of the variables. The accommodation sector accounted for the largest proportion of tourist expenditure in both Badenoch & Strathspey and the Park as a whole (Table 10.19). The sector with the next highest level of tourist expenditure was food and drink emphasising the importance of tourist related businesses to the local economy. In Badenoch & Strathspey expenditure decreased in all sectors 2006-2007, with the decrease slightly greater at the Badenoch & Strathspey level than overall.

Table 10.19: Analysis by Sector of Expenditure – Badenoch & Strathspey (£m)

	2007	2006	% Change B&S	% Change CNP Area
<b>Accommodation</b>	<b>30.49</b>	<b>33.02</b>	<b>-8</b>	<b>-7</b>
<b>Food and Drink</b>	<b>20.00</b>	<b>21.58</b>	<b>-7</b>	<b>-7</b>
<b>Recreation</b>	<b>7.99</b>	<b>8.40</b>	<b>-5</b>	<b>-5</b>
<b>Shopping</b>	<b>11.07</b>	<b>11.85</b>	<b>-7</b>	<b>-6</b>
<b>Transport</b>	<b>19.78</b>	<b>21.79</b>	<b>-9</b>	<b>-8</b>
<b>Indirect Expenditure</b>	<b>32.56</b>	<b>34.71</b>	<b>-6</b>	<b>-6</b>
<b>VAT</b>	<b>15.63</b>	<b>16.91</b>	<b>-8</b>	<b>-7</b>
<b>Total</b>	<b>137.52</b>	<b>148.26</b>	<b>-7</b>	<b>-6</b>

Source: STEAM Report 2007

10.8.8 Table 10.20 shows that in both 2006 and 2007 tourists staying in serviced accommodation generated the largest proportion of total revenue. Revenue declined in all categories of visitor, with an overall decline of -6 %, while the greatest decrease was in Serviced Accommodation. However, day visitors showed an increase of 1 % at both area levels.

Table 10.20: Revenue by Category of Visitor (£m)

	2007	2006	% Change B&S	% Change CNP Area
<b>Serviced Accommodation</b>	<b>81.84</b>	<b>92.85</b>	<b>-12</b>	<b>-10</b>
<b>Non-serviced Accommodation</b>	<b>29.46</b>	<b>29.32</b>	<b>0</b>	<b>-0</b>
<b>Staying Friends and Relatives</b>	<b>1.55</b>	<b>1.59</b>	<b>-3</b>	<b>-3</b>
<b>Day Visitors</b>	<b>24.67</b>	<b>24.49</b>	<b>1</b>	<b>1</b>
<b>Total</b>	<b>137.52</b>	<b>148.26</b>	<b>-7</b>	<b>-6</b>

Source: STEAM Report 2007

10.8.9 Tourist data on day visitors show a decrease of -5 % in tourist days spent in each of the areas, which is consistent with the fall in tourist numbers and revenue collected by tourists of this profile (Table 10.21). Day visitors showed the only static position in terms of tourist days, with a marginal increase 2006-2007 in Badenoch & Strathspey.

Table 10.21: Tourist Days (000's)

	2007	2006	% Change B&S	% Change CNP Area
<b>Serviced Accommodation</b>	<b>806.28</b>	<b>883.59</b>	<b>-9</b>	<b>-8</b>
<b>Non-serviced Accommodation</b>	<b>850.33</b>	<b>891.39</b>	<b>-5</b>	<b>-6</b>
<b>Staying Friends and Relatives</b>	<b>69.76</b>	<b>71.53</b>	<b>-2</b>	<b>-2</b>
<b>Day Visitors</b>	<b>665.89</b>	<b>662.68</b>	<b>0</b>	<b>0</b>
<b>Total</b>	<b>2,392.26</b>	<b>2,509.19</b>	<b>-5</b>	<b>-5</b>

Source: STEAM Report 2007

10.8.10 The position in terms of tourist numbers in Badenoch & Strathspey overall was static / marginal increase, slightly less but broadly the same as for the National Park overall (Table 10.22). The decline in tourist numbers staying in non-serviced accommodation and staying with friends and relatives was greatest (-3 %) for each at the overall National Park level, while for these sectors in Badenoch & Strathspey non-serviced accommodation held up better with a decline of only -1 %.

**Table 10.22: Tourist Numbers (000's)**

	2007	2006	% Change B&S	% Change CNP Area
<b>Serviced Accommodation</b>	<b>351.31</b>	<b>347.32</b>	<b>1</b>	<b>2</b>
<b>Non-serviced Accommodation</b>	<b>129.77</b>	<b>131.69</b>	<b>-1</b>	<b>-3</b>
<b>Staying Friends and Relatives</b>	<b>15.29</b>	<b>15.70</b>	<b>-3</b>	<b>-3</b>
<b>Day Visitors</b>	<b>665.89</b>	<b>662.68</b>	<b>0</b>	<b>0</b>
<b>Total</b>	<b>1,162.26</b>	<b>1,157.39</b>	<b>0</b>	<b>1</b>

Source: STEAM Report 2007

**10.8.11**The accommodation sector accounts for the greatest proportion of Full Time Equivalent jobs (an FTE is the equivalent of 1 full-time worker) in the area, accounting for 53 % of total direct employment in 2007 (Table 10.23). This was also the only sector which showed an increase at both area levels, with Badenoch & Strathspey slightly greater (+4 %) than the National Park overall (3 %). However, the other sectors, and employment in total all showed a decrease over the period.

**10.8.12**Table 10.24 allows the tourist profile of tourists visiting the National Park, Moray Badenoch & Strathspey, and Scotland to be compared by making reference to 3 different data sources which analysis tourism in 3 different geographical areas.

**Table 10.23: Sectors in which Employment is Supported (FTEs)**

	2007	2006	% Change B&S	% Change CNP Area
<b>Accommodation</b>	<b>1,689</b>	<b>1,625</b>	<b>4</b>	<b>3</b>
<b>Food and Drink</b>	<b>538</b>	<b>580</b>	<b>-7</b>	<b>-7</b>
<b>Recreation</b>	<b>214</b>	<b>225</b>	<b>-5</b>	<b>-5</b>
<b>Shopping</b>	<b>287</b>	<b>307</b>	<b>-7</b>	<b>-6</b>
<b>Transport</b>	<b>457</b>	<b>504</b>	<b>-9</b>	<b>-8</b>
<b>Total Direct Employment</b>	<b>3,185</b>	<b>3,241</b>	<b>-2</b>	<b>-2</b>
<b>Indirect Employment</b>	<b>709</b>	<b>756</b>	<b>-6</b>	<b>-6</b>
<b>Total</b>	<b>3,894</b>	<b>3,997</b>	<b>-3</b>	<b>-2</b>

Source: STEAM Report 2007

**10.8.13**The National Park area attracts a larger proportion of visitors from within Scotland compared to Moray, Badenoch & Strathspey<sup>31</sup> and Scotland overall, but attracts notably fewer tourists from other parts of the UK relative to Scotland and Moray, Badenoch & Strathspey.

**10.8.14**The majority of tourists visiting each area in each of the three surveys are over 45 years of age with the smallest proportion of tourists falling into the 16-24 year old age category. This shows that the age profile of tourists visiting the National Park area are broadly in line with the wider area of Moray, Badenoch & Strathspey and the Scottish average.

**10.8.15**The Park area has slightly less pairs (2) of tourists visiting the area compared to Moray, Badenoch & Strathspey, but has a higher proportion of solo tourists and groups of 3 or 4 people. Day visits to the Park area also appear to be more prevalent compared to Moray, Badenoch & Strathspey with overnight tourist trips accounting for a little over two-thirds of total trips.

**10.8.16**The accommodation visitors chose to stay in broadly corresponded with the wider area of Moray, Badenoch & Strathspey. When looking at tourism in Scotland, the significant number of tourists staying with friends and relatives somewhat skewed the comparison with the Park area. Despite this, a similar pattern of accommodation can be observed with most accommodation types.

<sup>31</sup> Moray has a population of around 90,000 and Badenoch & Strathspey around 11,000 (source: Highlands and Islands Enterprise).

Table 10.24: Profile of Visitor (%)

	Cairngorms National Park Visitors Survey 2003/04	Tourism in Scotland 2003	Highland Visitor Survey 2003, (Mòray, Badenoch & Strathspey)
Origin of Visitor:			
<b>Scotland</b>	<b>58</b>	<b>44</b>	<b>45</b>
<b>Other UK</b>	<b>28</b>	<b>47</b>	<b>38</b>
<b>Overseas</b>	<b>15</b>	<b>9</b>	<b>17</b>
Gender :			
<b>Male</b>	<b>52</b>	<b>n/a</b>	<b>51</b>
<b>Female</b>	<b>48</b>	<b>n/a</b>	<b>49</b>
Age:			
<b>16-24</b>	<b>8</b>	<b>13</b>	<b>5</b>
<b>25-44</b>	<b>36</b>	<b>43</b>	<b>39</b>
<b>Over 45</b>	<b>56</b>	<b>44</b>	<b>55</b>
Number in Party:			
<b>One</b>	<b>16</b>	<b>n/a</b>	<b>8</b>
<b>Two</b>	<b>47</b>	<b>n/a</b>	<b>51</b>
<b>Three or Four</b>	<b>29</b>	<b>n/a</b>	<b>14</b>
<b>Five+</b>	<b>8</b>	<b>n/a</b>	<b>n/a</b>
Type of Trip:			
<b>Day Visit</b>	<b>33</b>	<b>n/a</b>	<b>16</b>
<b>Away from home overnight</b>	<b>67</b>	<b>n/a</b>	<b>84</b>
Accommodation Type:			
<b>Bed and Breakfast</b>	<b>15</b>	<b>9</b>	<b>18</b>
<b>Hotel/Guest House</b>	<b>35</b>	<b>33</b>	<b>32</b>
<b>Self-catering</b>	<b>16</b>	<b>6</b>	<b>17</b>
<b>Hostel</b>	<b>3</b>	<b>2</b>	<b>3</b>
<b>Time Share</b>	<b>5</b>	<b>n/a</b>	<b>7</b>
<b>Staying with friends</b>	<b>8</b>	<b>40</b>	<b>14</b>
<b>Touring Caravan/ tent</b>	<b>8</b>	<b>8</b>	<b>10</b>
<b>Other</b>	<b>2</b>	<b>7</b>	<b>4</b>

Source: See column titles.

**10.8.17** The leading motives for visiting the Park area were walking and to observe the area's beautiful scenery (Table 10.25). Looking at wildlife and plants and recommendations from friends and relatives about the area were among the least reported reasons respondents provided for visiting the area.

Table 10.25 Main Reason for Visiting Park

	% of Respondents
<b>Walking</b>	<b>14</b>
<b>Beautiful scenery</b>	<b>11</b>
<b>Visiting friends/ families</b>	<b>8</b>
<b>Like the area</b>	<b>8</b>
<b>Been before</b>	<b>7</b>
<b>Peace and quiet</b>	<b>4</b>
<b>Never been before</b>	<b>4</b>
<b>Mountains/ hills</b>	<b>3</b>
<b>Cairngorm mountain railway</b>	<b>3</b>
<b>Wildlife/ plants</b>	<b>3</b>
<b>Recommended by a friend</b>	<b>2</b>

Source: Cairngorms National Park Visitor Survey 2004

## 10.9 Tourism Summary

- The accommodation, and food and drink sectors account for the largest proportion of tourist expenditure in the area;
- Those staying in non-serviced accommodation stay longer in the area than those in serviced accommodation;
- Tourists staying in serviced and non-serviced accommodation accounted for 81% of total tourist revenue in 2004;
- The total number of day visitors, visiting the area is falling, as is the number of days and money they spend in the area,
- The accommodation sector accounts for the greatest proportion of ftes<sup>32</sup> in the area, accounting for 54 % of total direct employment. Indirectly tourism accounts for 18 % of the total ftes in the area;
- The age profile of tourists visiting the National Park area are broadly in line with the wider area of Moray, Badenoch & Strathspey and the Scottish average; and
- Day visits to the Park are more prevalent relative to Moray, Badenoch & Strathspey, however overnight tourist trips still account for a little over two-thirds of total trips.

<sup>32</sup> An FTE is the equivalent of 1 person working full-time.

## Tourism & Recreation Audit - Identification of Principal Activities and Facilities

**10.9.1** In assessing the tourist, visitor and recreational facilities within the study area, it is those which register most frequently or readily within tourist or visitor websites, brochures, guidebooks, and other media that are taken here to represent the principal tourism resources in the area. This is a standard approach taken as a proxy for tourists or other visitors assessing the potential attraction of an area. Therefore we have set out below the principal attractions, festivals and events, walking and cycling routes, and other facilities.

### Definition of Study Area

**10.9.2** The proposed settlement is located less than one kilometre east of Aviemore. As defined above, the overall study area has been taken to be a radius of 10km from the settlement boundary.

### Audit

**10.9.3** This section identifies all the various forms of tourism and recreation activities or facilities within the study area. This includes settlements, tourist routes, walking routes, rights of way, core paths, bridleways, climbing routes, cycle routes, golf and fishing (i.e. lochs and rivers), forest parks/nature reserves, estates, events, visitor attractions, activity centres and accommodation providers present. The area is attractive with open countryside, mountain ranges, and the wider Park, with excellent walking, cycling and fishing, and extensive bird and wildlife. Among the activities promoted within the area are walking, fishing, cycling and bird watching.

**10.9.4** A full audit list for the study area is provided in the Appendix F.

### Principal Settlements

**10.9.5** The principal settlements in this study are:

- Aviemore;
- Bridge of Garten;
- Carrbridge;
- Inverdrue and Coylumbridge; and
- Kincaig.

**10.9.6** Outwith the 10 km study area there are also a number of villages which provide a range of accommodation, retail, and other services for visitors and recreational users, including Nethybridge, Grantown-on-Spey to the north and Kingussie, Newtonmore and Dalwhinnie to the south. These villages' business facilities have been included within the business survey.

## Principal Tourist Routes

**10.9.7** The principal tourist routes i.e. roads within a 10 km distance of the proposed development are:

- A9 Tourist Route - A road leading from Perth to Inverness;
- A938 - A road running from the A9 through Carrbridge to Dulnain Bridge;
- A95 - Aviemore (converts from B9152) leading to Grantown-on-Spey, passing to the north of Boat of Garten;
- B9152 - B road running parallel to A9, passing Kincaig, through Aviemore to meet A95;
- B9153 - B road running from north of Kinveachy north to Carrbridge;
- B970 - B road running from Kingussie to Inverdrue passed Loch Insh, Coylumbridge. Loch Pityoulish to Nethy Bridge;
- Coylumbridge to Cairngorm Route - Minor road leading from Coylumbridge to Cairngorm, via Loch Morlich;
- Perth to Inverness Railway - Railway running from Perth (and further south) to Inverness, passing through Aviemore; and
- Strathspey Steam Railway – Historic visitor railway running from Aviemore to Boat of Garten.

## Principal Walking Routes - Long Distance Routes

**10.9.8** There is a wide variety of long distance walks in, around and across the area. The main long distance walking route in the area is the Speyside Way (c.65 miles) - The walk starts at Buckie and then proceeds south west, through Craigellachie, Ballindalloch, and Grantown-on-Spey, to finish in Aviemore. There is also a spur from Ballindalloch to Tomintoul.

## Core Paths

**10.9.9** One of the duties of the different councils in Scotland under the Land Reform (Scotland) Act 2003 was to prepare a draft core path plan by February 2008. This consists of a system of paths sufficient to give the public reasonable access in their local area, generally around settlements and including well known rights of way or well used paths. Maps with the routes of each Core Path are provided in the appendices.

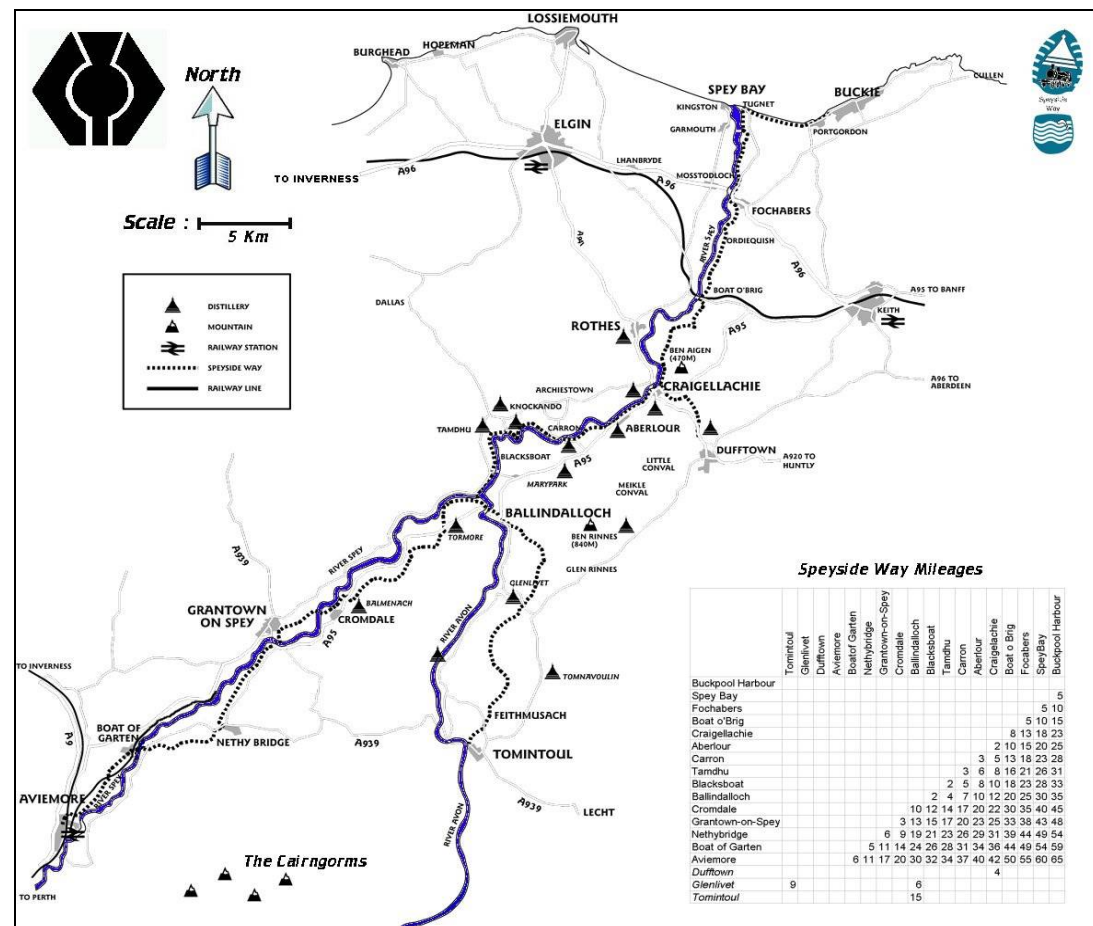


Figure 10.6 Map of the Speyside Way

Source: The Official Speyside Way Website –Available at <http://www.moray.gov.uk/area/speyway/webpages/index.htm>

10.9.10 There are 71 Core Paths contained within the study area as follows:

- CC3 - Lairig Ghru;
- CC4 - Lairig an Laoigh;
- GR1 - Rothiemurchus Blue Route;
- GR12 - Allt Mor Trail;
- GR13 - The Loch Trail;
- GR15 - Loch Morlich Circular;
- GR16 - Loch Morlich Link Trail;

- GR2 - Rothiemurchus Red Route;
- GR3 - View of the Mountains Walk;
- GR4 - Lochs Walk;
- GR5 - Quiet Walk;
- GR6 - The Sluggan;
- GR7 - Meall a' Bhuachaille Trek;
- GR8 - Ryvoan Trek;
- GR9 - Glenmore Lodge (Off-Road Route);
- LBS1 - The River Spey;
- LBS109 - Feshiebridge Woodland Path;
- LBS110 - Invereshie House to Feshiebridge Path;
- LBS111 - Abernethy Red Route;
- LBS112 - Loch Garten to Loch Mallachie Path;
- LBS113 - A95 Cycle Path;
- LBS114 - Sustrans Route 7;
- LBS116 - The Speyside Way;
- LBS121 - River Path;
- LBS122 - Carr Plantation Path;
- LBS123 - Carrbridge Golf Course Path;
- LBS124 - High Burnside Path;
- LBS125 - Spey Access Point;
- LBS126 - Sustrans Route 7;
- LBS127 - Ryvoan Pass;
- LBS128 - Hill Path;
- LBS137 - Spey Access Point;
- LBS138 - Craigellachie Viewpoint Path;

- LBS140 - Proposed Speyside Way Extension;
- LBS29 - Glenmore Off-Road Route;
- LBS30 - Aviemore Orbital;
- LBS31 - Cycle Path;
- LBS32 - Dalfaber Woods;
- LBS33 - Dalfaber Club House to River;
- LBS34 - Golf Course Link to River;
- LBS35 - Aviemore Burn;
- LBS36 - Myrtlefield Path;
- LBS37 - Laurel Bank Lane;
- LBS38 - Craigellachie All Abilities;
- LBS39 - Craigellachie Nature Reserve Path;
- LBS40 - Dalfaber Drive to Milton Woods;
- LBS41 - School to Milton Woods;
- LBS42 - Old Bridge Road;
- LBS43 - Croftside Junction to Dalfaber Industrial Estate;
- LBS46 - North West Shore of Loch Insh;
- LBS47 - Dunachton Woods Path;
- LBS48 - Dunachton Woods Loop;
- LBS49 - Dunachton Woods South Link;
- LBS50 - Spey Access Point;
- LBS53 - Sustrans Route 7;
- LBS56 - Ellan Wood Path;
- LBS57 - Glencarnoch Path;
- LBS58 - Cemetery Path;
- LBS59 - Village Hall Woodland Walk;
- LBS60 - Straiton Link;
- LBS61 - River Dulnain Path;
- LBS62 - Lochanhully Link;
- LBS63 - Baddengorm Wood Path;
- LBS64 - The Speyside Way - Proposed Off-Road Section;
- LBS66 - River Path;
- LBS67 - Woodland Path;
- LBS69 - Craigie to Curling Pond Path;
- LBS70 - All Abilities Trail;
- LBS71 - Boat to Dumullie;
- LBS72 - The Badenoch Way; and
- LBS85 - Puggy Line Trail.

### Settlement Walks<sup>33</sup>

#### 10.9.11 Walks around Aviemore include:

- Aviemore Route 1 - Aviemore Mini Town Circuit;
- Aviemore Route 2 - South to Inverdrue;
- Aviemore Route 3 - North to Dalfaber;
- Aviemore Route 4 - Craigellachie: The Red Trail;
- Aviemore Route 5 - Craigellachie: The Green Trail;
- Aviemore Route 6 - The Aviemore Orbital; and
- Aviemore Route 12 - Loch an Eilein from Inverdrue.

#### 10.9.12 Walks around Boat of Garten include:

<sup>33</sup> Source: Websites including [www.carrbridge.com](http://www.carrbridge.com), [www.visitaviemore.com](http://www.visitaviemore.com), [www.nethybridge.com](http://www.nethybridge.com), [www.kincraig.com](http://www.kincraig.com), and [www.boatofgarten.com](http://www.boatofgarten.com).

- Aviemore Route 9 - Boat of Garten RSPB Walk;
- Aviemore Route 10 - Boat of Garten Riverside Walk;
- Aviemore Route 11 - Boat of Garten Fairyhill Viewpoint Walk;
- Boat of Garten Walk 1; and
- Boat of Garten Walk 4.

**10.9.13** Walks around Carrbridge include:

- Cairngorm View Walk;
- Ellan Wood Walk; and
- Glencharnoch Walk.

**10.9.14** Walks around Glenmore Forest Park and Cairngorm include:

- An Sluggan Trail;
- Aviemore Route 7 - Glenmore Forest: Allt Mor All-Ability Trail;
- Aviemore Route 8 - Loch Morlich Circular;
- Coire Cas Trail;
- Glenmore Allt Mor Forest Trail;
- Glenmore Lochan nan Nathrach;
- Glenmore Rieunachan Walk;
- Glenmore Ryvoan Trail;
- Glenmore Woodland Trail; and
- Windy Ridge Trail.

**10.9.15** Walks around Kincaig include:

- The Badenoch Way;
- Loch an Eilein and Loch Gamhna Walk;
- Upper Glens Feshie;
- The Lily Loch; and
- Uath Lochan.

### Hill Tracks<sup>34</sup>

**10.9.16** The Hill Tracks (which are not counted in the RofW section) that are located within the study area are:

- Hill Track 180 - Drumguish or Feshie Bridge to Linn of Dee by Glen Feshie and Glen Geldie;
- Hill Track 182 - Linn of Dee to Nethy Bridge by the Lairig an Laoigh;
- Hill Track 182X - Feshie Bridge to Nethy Bridge through the forests of Inshriach, Rothiemurchus, Glenmore and Abernethy;
- Hill Track 183 - Coylumbridge to Achlean (Glen Feshie) by Gleann Einich; and
- Hill Track 189 - Cock Bridge (Donside) to Nethy Bridge or Aviemore.

### Other Walks<sup>35</sup>

**11.9.17** There are also a wide range of more local walks, paths and Rights of Way, which criss-cross the study area. These include a diverse range of short to medium length village and rural walks, beside rivers and through woodland, and most of these walks are used sporadically by local residents and visitors alike, but any data upon their level of usage are unavailable.

**11.9.18** Some of these routes may follow the Rights of Way in the area (described in the next section) but have all been mentioned here separately as they may have extra 'legs' or variations from the original Rights of Way.

**11.9.19** After consultation with a Highland Council Ranger, it has been noted that most of the walks in the area that are used will have been covered by the Core Paths Plan, therefore only walks that have been identified as being different from Core Paths have been identified in this section.

### Rights of Way - Definition of Rights of Way<sup>36</sup>

**10.9.20** A Right of Way (RofW) is defined as a path which links two public places (including roads), over land which is owned by another party and has been used by the general public for at least 20 years. The council which has jurisdiction in the area has a duty to keep these routes open and free from obstructions.

<sup>34</sup> "Scottish Hill Tracks", Scottish Rights of Way Society, 2004

<sup>35</sup> Source: websites including [www.speysideway.org](http://www.speysideway.org), [www.ramblers.org.uk](http://www.ramblers.org.uk), [www.walkingbritain.co.uk/](http://www.walkingbritain.co.uk/), [www.walkscotland.com/](http://www.walkscotland.com/), <http://walking.visitscotland.com>, and [www.walkingwild.com](http://www.walkingwild.com).

<sup>36</sup> Source: ScotWays (July and November 2008)

**10.9.21** These routes can be anything from local footpaths used for dog walking to bridleways, roads and long distance hill paths. A variety of users can also be found on the RofW including walkers, cyclists and horse riders. Many RofWs are also able to be accessed by disabled people.

**10.9.22** The main authority on RofWs in Scotland is ScotWays. ScotWays has been working to look after Rights of Way for 160 years. They created and now maintain the National Catalogue of Rights of Way, together with Scottish Natural Heritage, which lists all the known Rights of Way in Scotland. It also deals with enquiries on problems related to the RofWs and provides legal advice on RofW law. This catalogue is the basis for the following analysis.

**10.9.23** The RofWs dealt with in this section come from maps made available by ScotWays. Maps with the routes of each RofW are provided in the appendices.

**10.9.24** There are 22 Rights of Way included within the study area, which are:

- GK1 - from a cairn east of Cairngorm Club Footbridge at 938075 leading south east following Allt Druidh through Lairig Ghru;
- HB14 - walk leading north to south through Creag Chrom-shroine woodland starting at the Gamekeeper's Cottand finishing at Feshiebridge;
- HB16 - leads from Coylumbridge south through Gleann Eanaich and onwards south;
- HB43 - Loch Insh east to Feshiebridge;
- HB44 - Feshiebridge south to Ballintean east of Inshriach Forest;
- HB45 - leads from the A9 at Lynwilg Farm north west through An Gelannan, following Allt Ghiuthais to Craggan. Then north east to Dalnahalnach;
- HB46 - leads from Glencairn off the B970 north west to The Speyside Way passed Kinchurdy Cottages;
- HB47 - from Kinveachy lodge north west along the General Wade's Military Road, Slochd;
- HB48 - starts at Dalnahalnach leading south east over Carn na Guaille, through woodland passed Avie Lochan to 916164;
- HB49 - from Carr Farm south east through woodland to Dochlaggie;
- HB50 - from 926208 in woodland south west to 923197;
- HB51 - from the A95 and Chapelton north to the power line then west to Docharn Cottage and then the B9153;
- HB52 - from the Speyside Way where it meets the Boat of Garten railway and HB46 south west through woodland to Loch nan Carraigeah and west to the A95 and Granish;
- HB54 - leads through the centre of Aviemore along the Speyside Way;

- HB55 - circular route around Loch an Eilein;
- HB56 - Loch an Eilein east to Cairngorm Club Footbridge;
- HB57 - from Coylumbridge south east to Cairngorm Club Footbridge;
- HB58 - Cairngorm Club Footbridge north passed Loch Morlich through Glenmore Forest to West Croftmore;
- HB59 - south east of Loch Morlich leading south west to meet GK1 at Allt Druidh
- HB60 - from Loch Morlich east;
- HB81 - Dalfaber Industrial Estate to Dalfaber; and
- HB82 - golf Course to the centre.

### Principal Cycle Routes<sup>37</sup>

**10.9.25** The principal cycle routes within the study are:

- National Cycle Route Number 7 - Lochs and Glens North- Inverness to Glasgow route;
- Boat of Garten Abernethy Forest Loch Garten and Loch Mallachie Loop;
- Boat of Garten Tulloch Moor Loop;
- Boat of Garten Loch Garten and Glenmore Loop;
- Boat of Garten to Aviemore Loop;
- Strathspey Map 1 - Orange Route- Glenmore to Badaguish Outdoor Centre then back in a loop to Loch Morlich;
- Strathspey Map 1 - Red Route - Inverdrue to Loch an Eilein then to Cairngorm Club Footbridge and Loch Morlich and back to Coylumbridge;
- Strathspey Map 1 - Yellow Route - through Glenmore Forest starting at Hay Field Car Park passed Glenmore Lodge and Loch nan Nantrach to Loch Morlich and the car park;
- Strathspey Map 1 - Single Track - Single Track riding near Badaguish Outdoor Centre;
- Strathspey Map 2 - Orange Route - Feshiebridge passed Ballintean through Glen Feshie then turning back north passed Glen Feshie Bunkhouse and Glider Site;

<sup>37</sup> Source: websites including [www.cyclingscotland.com](http://www.cyclingscotland.com), <http://cycling.visitscotland.com/>, [www.cyclewildscotland.co.uk](http://www.cyclewildscotland.co.uk), [www.edinburghbicycle.com](http://www.edinburghbicycle.com), [www.sustrans.org.uk](http://www.sustrans.org.uk) and [www.carribridge.com](http://www.carribridge.com)

- Strathspey Map 2 - Red Route - Inverdrue to Loch an Eilein and Lochan Deo, then through Gleann Einich to Loch Einich;
- Strathspey Map 2 - Yellow Route - Feshiebridge through woodland at Moor of Feshie;
- Strathspey Map 3 - Yellow Route - Feshiebridge to Torbreck Cottage and back;
- Strathspey Map 3 - Orange Route - car park by River Feshie south of Uath Lochan leading north to Uath Lochan, around Creag Dubh;
- Strathspey Map 3 - Single Track - Single track riding around Badandubh;
- Strathspey Map 4 - Yellow Route - south of Aviemore following the eastern railway and the Speyside Way then returning following the western railway;
- Strathspey Map 4 - Orange Route - Carrbridge to Slochd, through woodland to Sluggan Bridge and then the A9. The route then leads to Boat of Garten and through woodland back to Carrbridge;
- Strathspey Map 4 - Red Route - Lynwilg along the Burma Road to Craggan then north to Dalnahalnach;
- Strathspey Map 5 - Orange Route - Glenmore visitor centre and leads north passed Badaguish Outdoor Centre, along An Sluggan to Boat of Garten;
- Strathspey Map 5 - Red Route - Duackbridge south through Abernethy Forest to Cairn Rynettin, through the Ryvoan Pass to Glenmore Lodge and visitor centre; and
- Strathspey Map 5 - Yellow Route - Boat of Garten to Duackbridge through woodland along the Speyside Way.

### Horse- Riding

**10.9.26** While there are informal bridleways within the study area, there are, however, no formal bridleways. The study area has three horse-riding facilities (not including the estate run facilities at Alvie and Rothiemurchus), which are:

- Alvie Stables;
- Carrbridge Trekking Centre; and
- Strathspey Highland Ponies.

### Climbing Areas

**10.9.27** The climbing areas located within the study area are The Northern Corries:

- Coire an t'Sneachda – with 3 main rock masses containing at least 4 climbs; and
- Coire an Lochain - with 4 buttresses with at least 6 climbs.

**10.9.28** Both of these climbing areas are accessed from Cairngorm Ski area and car park, within the study area. Cairngorm and the Northern Corries are a well known area for climbers, with seven other climbing areas spread out within them, outwith the study area<sup>38</sup>. These include:

- Shelter Stone Crag;
- Hell's Lum Crag;
- Stag Rocks;
- Stac an Fharaidh;
- Coire Sputan Dearg;
- Creagan a'Choire Etchanchan; and
- Garbh Choire.

### Golf

**10.9.29** There are three golf courses within the study area, which are:

- Boat of Garten Golf Course;
- Carrbridge Golf Course; and
- Spey Valley Golf Course.

**10.9.30** Abernethy Golf Club and Grantown-on-Spey Golf Club are both located just outwith the 10 km study radius.

### Fishing

**10.9.31** Within the study area there are two angling associations: Abernethy Angling Association and Badenoch Angling Association.

**10.9.32** Fishing for salmon, trout and coarse fishing takes place on lochs, lochans, rivers and streams, including:

- Avie Lochan;
- Dell Stream;
- Inverdrue Fisheries;
- Lily Loch;
- Loch Alvie;

<sup>38</sup> "Scottish Rock Climbs – SMC Climbers Guide", Scottish Mountaineering Club, Andy Nisbet, 2005

- Loch an Eilein;
- Loch Beag;
- Loch Dallas;
- Loch Insh;
- Loch Mor;
- Loch Morlich;
- Loch Pityoulish;
- Loch Vaa;
- Lochin Dorb;
- River Feshie;
- River Dulnain; and
- River Spey.

### Munros and Corbetts

**10.9.33** Munro and Corbetts that are located within the study area include:

- Ben MacDui (1,295 m), south east of Coylumbridge;
- Braeriach (1,235 m), south of Coylumbridge;
- Cairngorm (1,245 m), south east of Coylumbridge;
- Sgoran Dubh Mor (1,111 m), south of Coylumbridge;
- Geal Charn (920 m), south east of Feshiebridge;
- Creag Dubh (848 m), south of Coylumbridge;
- Geal-charn Mor (824 m), west of Aviemore;
- Meall a'Bhuachaille (810 m), north east of Glenmore Forest Park; and
- Geal-charn Beag (764 m), west of Aviemore.

### Forest Parks/Nature Reserves

**10.9.34** The forest parks and nature reserves located within the study area are:

- Abernethy Forest and Dell Woods;
- Cairngorms National Park;
- Craigellachie National Nature Reserve;
- Glenmore Forest Park, Nature Reserve and Visitor Centre;
- Inch Marshes Nature Reserve;
- Inshriach Forest; and
- RSBP Osprey Centre.

### Estates

**10.9.35** The estates located within the 10 km study area include:

- Alvie Estate;
- Dunachton Estate;
- Invereshie Estate;
- Pityoulish Estate;
- Rothiemurcus Estate;
- Strathspey Estate;
- Inshriach Estate; and
- Kinrara Estate.

**10.9.36** These estates provide accommodation and a wide range of recreation and sporting opportunities including a range of fishing (mainly salmon and trout), shooting (anything from pheasant and partridge to clay pigeons and grouse) and stalking (red and roe deer), among others, and can provide passes for other activities on the estates or in near-by settlements.

### Events<sup>39</sup>

**10.9.37** Events that take place within the study area include:

- Aviemore Highland Show – Yearly from July to September;

<sup>39</sup> Source: OS Maps, web search using websites including [www.visitscotland.com](http://www.visitscotland.com), [www.visitaviemore.com](http://www.visitaviemore.com), and [www.kincraig.com](http://www.kincraig.com).

- Aviemore Half Marathon –19th October 2008;
- Aviemore Mountain Film Festival – Yearly in May;
- Aviemore Walking Festival – Yearly in May;
- Boat of Garten Station, Strathspey Railway, Steam Fair – Yearly in mid July;
- Boat of Garten Summer Festival – Yearly at the end of May/beginning of June;
- Boat of Garten Winter Festival – Yearly in December;
- Cairngorm Farmers Market - Throughout the year;
- Cairngorm Mountain, Cairngorms Wildlife Exhibition –1st - 31<sup>st</sup> July;
- Carrbridge Challenge Forest Run 2008 – October 2008;
- Carrbridge Festival of Golf - July 2008;
- Chainsaw Log Sculpture Competition –30<sup>th</sup> August 2008;
- Continental Market – Yearly in August;
- Kincaig Village Fete – Yearly in June;
- Scottish Bikeathon – Yearly in June;
- Thunder in the Glens – Yearly in August;
- World Porridge Making Championship – Yearly in October; and
- The Outsider Festival – Yearly in June.

**10.9.38**The Abernethy Highland Games in Nethybridge is located just outside the study area and is therefore not included.

### Visitor Attractions<sup>40</sup>

**10.9.39**The visitor attractions contained within the study area as follows:

- Alpine Nursery;
- Auchgourish Botanic Garden and Arboretum;
- Aviemore Children's Playground;

<sup>40</sup> Source: OS Maps, web search using websites including [www.visitscotland.com](http://www.visitscotland.com), [www.visitaviemore.com](http://www.visitaviemore.com), and [www.kincraig.com](http://www.kincraig.com).

- Aviemore Tourist Information;
- Cairngorm Brewery;
- Cairngorm Mountain Railway;
- Carrbridge Artists Studio;
- Inshriach Alpine Nursery;
- Landmark Forest Heritage Park;
- Lisi's Log Cabin and Wood Gallery;
- Loch an Eilein Pottery;
- Loch an Eilein Visitor Centre;
- Rothiemurchus Visitor Centre;
- Smarty Arty - Ceramic Painting;
- Speyside Horn and Craft Shop;
- The Aviemore Centre; and
- The Doune of Rothiemurchus;
- Working Sheepdogs.

**10.9.40**The Highland Wildlife Centre is located just outwith the 1 0km study area, to the south west of Loch Insh and is therefore not included in the tourism analysis.

### Activity Centres<sup>41</sup>

**10.9.41** There are various activity centres that are based and practice within the study area including:

- Ace Adventure Outdoor Centre;
- Adventure Scotland;
- Aviemore Climbing Wall;
- Aviemore Kart Raceway;

<sup>41</sup> Source: web searches using websites including [www.google.com](http://www.google.com), [www.activity-scotland.org.uk](http://www.activity-scotland.org.uk), [www.ahoec.org](http://www.ahoec.org), and [www.visitscotland.com](http://www.visitscotland.com).

- Aviemore Quad Bike Treks;
- Badaguish Outdoor Centre;
- Bothy Bikes;
- Cairngorm Gliding Club and Feshie Airfield;
- Cairngorm Mountain Sports;
- Cairngorm Ski Area;
- Cairngorm Sleddog Adventure Centre;
- Carrbridge Bowling Green;
- Carrbridge Ski School;
- Cyclelife;
- Cycle Wild Scotland;
- Fat Tread Bikes;
- Full on Adventure;
- G2 Outdoor Ltd;
- Glenmore Lodge;
- Glenmore Ski Shop and Aviemore Ski School;
- Highland Discovery Tours;
- Highland Venture Quad Nike Treks;
- Highland Wildlife and Birdwatching Safaris;
- HooNin – Mtb;
- Lagganlia Outdoor Centre;
- Loch Insh Water Sports Centre, Ski School and Chalets;
- Loch Morlich Water Sports;
- Mountain Innovations;
- Mountain Spirit;
- Osprey Fishing School;

- Outdoor Discovery Ltd/School of Snowsports;
- Rapid Fire Paintball;
- Rothiemurchus Clay Pigeon Shooting;
- Rothiemurchus and Aviemore Tennis Club;
- Snowlimit; and
- Speyside Wildlife.

### Accommodation - Hotels

**10.9.42**The study area is home to a reasonably wide range of accommodation including hotels of varying standards and varying locations. Some of the more notable hotels featured in visitor and tourism websites and guides to the area, include the following:

- Academy Hotel (MacDonald Hotels), Aviemore;
- Alt Na Craig Hotel, Aviemore;
- Ardinsh Hotel, Kincaig;
- Aviemore Highland Resort (MacDonald Hotels), Aviemore;
- Aviemore Inn (MacDonald Hotels), Aviemore;
- Cairn Hotel, Carrbridge;
- Cairngorm Hotel, Aviemore;
- Carrbridge Hotel, Carrbridge;
- Dalfaber Golf and County Club, Aviemore;
- Dalrachney Lodge Hotel, Carrbridge;
- Fairwinds Hotel, Carrbridge;
- Four Seasons Hotel (MacDonald Hotels), Aviemore;
- Heathbank Hotel, Boat of Garten;
- Highland Hotel (MacDonald Hotels), Aviemore;
- Hilton Coylumbridge Hotel, Aviemore;
- Lochanhully Woodland Club Hotel, Carrbridge;
- McKenzies Highland Inn, Aviemore;

- Ossian Hotel, Kinncraig;
- Rowan Tree Hotel, Loch Alvie;
- Struan House Hotel, Carrbridge;
- Suie Hotel, Kinncraig; and
- The Boat Hotel, Bridge of Garten.

### Accommodation - B&B and Guest Houses

**10.9.43** The study area is also home to at least 50 B&Bs and guest houses of varying standards in both the largest town of Aviemore and also in the intermediate rural area and surrounding settlements. A full list is presented in the Technical Appendices.

### Accommodation - Holiday, Caravan and Camping Parks

**10.9.44** There are a few well established caravan sites within the study area comprising:

- Badaguish Outdoor Centre Camping;
- Boat of Garten Holiday Park, Boat of Garten;
- Dalfaber Golf and Country Club, Aviemore;
- Dalraddy Holiday Park, Alvie Estate;
- Edinkillie Campsite, Aviemore;
- Glenmore Caravan and Camping Site, Badaguish Outdoor Centre;
- High Range Complex - Touring Caravan and Camping Site, Aviemore;
- Loch Garten Lodges and Caravan Park, Boat of Garten (north of Loch Garten);
- Lochanhully Woodland Club, Carrbridge;
- Osprey Caravan Park and Services, Boat of Garten (north of Loch Garten);
- Rothiemurchus Camp and Caravan, Rothiemurchus;
- Scandinavian Village, Aviemore; and
- Speyside Leisure Park, Aviemore.

### Accommodation - Youth Hostel

**10.9.45** Within the study area there are several youth hostels, which are:

- Alltnacriche, Aviemore;
- Aviemore Bunkhouse, Aviemore;
- Aviemore Youth Hostel, Aviemore;
- Cairngorm Christian Centre, Kinncraig;
- Cairngorm Lodge (Loch Morlich) Youth Hostel, Loch Morlich;
- Carrbridge Bunkhouse, Carrbridge;
- Fraoch Lodge, Carrbridge; and
- Glen Feshie Hostel.

### Accommodation - Self Catering

**10.9.46** There is a wealth of self-catering accommodation within the study area, with at least 60 self-catering businesses present. This accommodation can range from a Castle or Hunting Lodge to a small cottage or apartment, out in the country or located right in the centre of the many small towns in the area. A full list of these businesses can be found in Appendix F.

## 10.10 Consultations

**10.10.1** Consultations were carried out with relevant public, private, and other third parties seeking their views on issues which they considered to be of importance to the assessment, on the proposed methodology of assessment, on any source of relevant information, and any local institutions, groups or individuals to be consulted, and / or other local sources of information which they considered of relevance as part of the assessment. The responses of the consultees generally were that the method and scope of the assessment was acceptable, and in terms of issues these are either included within or confirmed the key issues raised in the baseline assessment.

## 10.11 Assessment of Effects - Evaluation Criteria

**10.11.1** The following table (Table 10.26) sets out the evaluation criteria for the level of significance in terms of impact on the economy and community within the survey area, including activities, resources, businesses, and the local population.

**Table 10.26 Evaluation of Impacts Criteria**

Impact	Definition
<b>Major Negative</b>	Where the extent of impacts on activities, resources, local businesses (defined as >15% on business turnover) or the local population is large in scale or magnitude, and a large number of people or activities would be affected.
<b>Moderate Negative</b>	Where the extent of impacts on activities, resources, local businesses (defined as 10-15 % on business turnover), or the local population is small in scale or magnitude, but a large number of people or activities would be affected.  <i>Or alternatively</i>  Where the extent of impacts on activities, resources, local businesses (defined as 10-15% on business turnover), or the local population is large in scale or magnitude but only a small number of people or activities would be affected.
<b>Slight Negative</b>	Where the extent of impacts on activities, resources, local businesses or the local population is small in scale or magnitude defined as <10% on business turnover, and would only affect a small number of people or activities.
<b>Neutral / None</b>	No impacts are predicted
<b>Positive Impacts</b>	Similar categories of impact as negative above but for positive reasons and outcomes

**Note: Activities and resources are set out in detail in Appendix F.**

## 10.12 Overall Impacts - Socio-economic Impacts

**10.12.1**This section deals with the impacts which the proposed settlement would have on the socio-economic aspects of the local area. This includes among others economic prospects, employment opportunities, business activities, and labour market issues.

### Business Survey & Assessment of Impact

**10.12.2**To establish the potential scale of impact and effect which would be likely to occur as a result of the development of An Camas Mòr, a business survey of all businesses within the memberships of the local Cairngorms Chamber of Commerce and Aviemore and district business associations was carried out during September - October 2008.

**10.12.3**The survey was undertaken via the business organisations, with a brief survey form being distributed to the organisations' members to determine the businesses' views on potential impact from the new development. The completed forms were returned via the organisations to Roger Tym & Partners for analysis. The information sought included the following:

- Type, size, and location of business, and as a result of An Camas Mòr;
- Potential increase / decrease in turnover;

- Potential increase / decrease in number of employees;
- Potential increase / decrease in level of trade;
- Potential increase / decrease level of investment; and
- Potentially greater ease / more difficulty in recruitment of staff.

**10.12.4**While the survey population is not intended to provide 100 % coverage of business activity in the area, it is regarded as relatively robust and representative of business activity in the area in general. Of a total of some 150 businesses, 38 responded, a response rate of c25 %.

**10.12.5**The analysis of the business survey's results demonstrates that of respondents who did consider there might be some form of impact upon their business 68.4 % (13) considered there to be a positive impact as a result of An Camas Mòr; 15.8 % (3) considered there might potentially be minor negative impacts (from loss of business, difficulty recruiting staff, potential traffic generation and possible spoiling of views from the north of Aviemore); and 15.8 % (3) of respondents considered that there could be both positive impacts in terms of easier recruitment of staff and negative impacts in terms of greater use of facilities and potential traffic generation.

**10.12.6**The key issues raised were the potential positive assistance in the recruitment of staff – through new population within An Camas Mòr and also the provision of affordable housing; and also the possible positive impact upon business turnover. Fourteen respondents (42 %) considered they would experience no impact from An Camas Mòr.

**10.10.7**It is interesting to note that the spread of business survey respondents has been wide and therefore the survey is not focussed solely on Aviemore businesses. There seems to be a wide geographical impact of An Camas Mòr economically in terms of jobs, activity, facilities and trading, as well as socially in terms of labour and skills issues. This geographically wide spread of business respondents clearly indicates strong socio-economic linkages within the local area and settlements.

**10.12.8**Full details of the impact assessment findings for the study area are provided in Appendix F.

## 10.13 Tourism and Recreation Impacts

**10.13.1**This section deals with the impacts which the proposed settlement would have on tourism and recreation within the study area. This includes settlements, tourist routes, walking routes, rights of way, core paths, cycle routes, horse riding, climbing routes, golf, fishing (i.e. lochs and rivers), winter sports, forest parks/nature reserves, estates, events, visitor attractions, activity centres and accommodation providers present within the study area.

**10.13.2**The impact of the proposed settlement on each activity or facility is detailed below by type, together with a final summary of all impacts and an overall conclusion.

**10.13.3**Full details of the impact assessment findings for the study area and Maps of the Rights of Way are provided in the Technical Appendices.

## Principal Settlements

**10.13.4** There are four principal settlements contained within the study area, which are dealt with here. The findings are as follows:

- 60 % (3) of the principal settlements would experience no impact from the settlement; and
- 40 % (2) of the principal settlements would experience a minor negative impact from the settlement.

## Principal Tourist Routes

**10.13.5** There are nine tourist routes contained within the study area that are assessed here, the impact upon which are as follows:

- 56 % (5) of the tourist routes would experience no impact from the settlement;
- 33 % (3) of the tourist routes would experience a minor negative impact from the settlement; and
- 11 % (1) of the tourist routes would experience a moderate negative impact from the settlement.

## Principal Walking Routes

**10.13.6** There are 32 principal walking routes/promoted paths contained within the study area which are dealt with here. The findings were as follows:

- 75 % (24) of the principal walking routes would experience no impact from the settlement; and
- 25 % (8) of the principal walking routes would experience a minor negative impact from the settlement

## Hill Tracks

**10.13.7** There are five Hill Tracks contained within the study area which are dealt with here. The findings were as follows:

- 60 % (3) of the Hill Tracks would experience no impact from the settlement; and
- 40 % (2) of the Hill Tracks would experience a minor negative impact from the settlement.

## Rights of Way

**10.13.8** There are 22 Rights of Way contained within the study area which are dealt with here. The findings were as follows:

- 73 % (16) of the Rights of Way would experience no impact from the settlement;
- 18 % (4) of the Rights of Way would experience a minor negative impact from the settlement; and
- 9 % (2) of the Rights of Way would experience a moderate negative impact from the settlement.

## Core Paths

**10.13.9** There are 71 Core Paths contained within the study area which are dealt with here. The findings were as follows:

- 73 % (52) of the Core Paths would experience no impact from the settlement;
- 14 % (10) of the Core Paths would experience a minor negative impact from the settlement; and
- 13 % (9) of the Core Paths would experience a moderate negative impact from the settlement.

## Principal Cycling Routes

**10.13.10** There are 21 principal cycling routes contained within the study area which are dealt with here. The findings were as follows:

- 86 % (18) of the principal cycling routes would experience no impact from the settlement; and
- 14 % (3) of the principal cycling routes would experience a minor negative impact from the settlement;

## Horse-riding

**10.13.11** There are three horse-riding contained within the study area which are dealt with here. The findings were as follows:

- 67% (2) of the horse-riding would experience no impact from the settlement; and
- 33% (1) of the horse-riding would experience a slight negative impact from the settlement.

## Climbing Routes

**10.13.12** There are two main climbing areas contained within the study area, which are dealt with here. The findings were as follows:

- 100 % (2) of the climbing areas would experience no impact from the settlement.

## Munros and Corbetts

**10.13.13** There are nine Munros and Corbetts within the study area dealt with here. The findings were as follows:

- 22 % (2) of the Munros and Corbetts routes would experience no impact from the settlement; and
- 78 % (7) of the Munros and Corbetts would experience minor negative impact from the settlement.

## Golf

**10.13.14** There are three golf courses/clubs contained within the study area which are dealt with here. The findings were as follows:

- 67 % (2) of the golf courses/clubs would experience no impact from the settlement; and
- 33 % (1) of the golf courses/clubs would experience a minor negative impact from the settlement.

## Fishing

**10.13.15** There are 17 fishing facilities contained within the study area which are dealt with here. The findings were as follows:

- 82 % (14) of the fishing facilities would experience no impact from the settlement;
- 12 % (2) of the fishing facilities would experience a minor negative impact from the settlement; and
- 6 % (1) of the fishing facilities would experience a moderate negative impact from the settlement

## Forest Parks/Nature Reserves

**10.13.16** There are seven forest parks/nature reserves contained within the study area which are dealt with here. The findings were as follows:

- 57 % (4) of the forest parks/nature reserves would experience no impact from the settlement;
- 14 % (1) of the forest parks/nature reserves would experience a minor negative impact from the settlement; and
- 29 % (2) of the forest parks/nature reserves would experience a moderate negative impact from the settlement.

## Estates

**10.13.17** There are eight estates contained within the study area which are dealt with here. The findings were as follows:

- 63 % (5) of the estates would experience no impact from the settlement;
- 13 % (1) of the estates would experience a minor negative impact from the settlement; and
- 25 % (2) of the estates would experience a moderate negative impact from the settlement.

## Events

**10.13.18** There are 18 events contained within the study area which are dealt with here. The findings were as follows:

- 89 % (16) of the events would experience no impact from the settlement; and
- 11 % (2) of the events would experience a minor negative impact from the settlement.

## Visitor Attractions

**10.13.19** There are 18 visitor attractions contained within the study area which are dealt with here. The findings were as follows:

- 89 % (16) of the visitor attractions would experience no impact from the settlement; and
- 11 % (2) of the visitor attractions would experience a minor negative impact from the settlement.

## Activity Centres

**10.13.20** There are 35 activity centres contained within the study area which are dealt with here. The findings were as follows:

- 97 % (34) of the activity centres would experience no impact from the settlement; and
- 3 % (1) of the activity centres would experience a minor negative impact from the settlement.

## Accommodation

**10.13.21** There are 153 accommodation providers contained within the study area which are dealt with here. The findings were as follows:

- 76 % (116) of the accommodation providers would experience no impact from the settlement; and
- 24 % (37) of the accommodation providers would experience a slight negative impact from the settlement.

### 10.14 Conclusion on Impacts

**10.14.1** Table 10.27 below sets out the nature of potential negative impact derived from the development of the wind farm, and by type of resource.

**10.14.2** In terms of impact, there would be minimal negative impact from An Camas Mòr. Overall 96 % (421) of tourism and recreation facilities would have a minor or negligible negative impact, with only 4 % (17) likely to have a possible moderate and significant negative impact.

**10.14.3** Major and moderate adverse impacts are assessed as significant. However, there are no negative impacts assessed as being of major scale upon tourism or recreation resources.

**10.14.4** The reason behind an impact being assessed as of moderate significance as shown in Table 10.28 relates to the resource’s proximity to An Camas Mòr, visibility of the village from the resource at various points, and where the extent of impacts on user activities is small in scale or magnitude, but a large number of people or activities would be affected. In each of the impacts assessed as moderate negative, these are as a result of the potential visual or other impact of An Camas Mòr upon users of the resource, compared to the present baseline circumstances where the site of the village is currently undeveloped. The nature of the impacts and assessment criteria are set out in summary in Table 10.28.

**10.27: Summary of Negative Impact on Tourism and Recreation**

	Number of Each Activity / Facility	Possible Major Negative Impact	Possible Moderate Negative Impact	Possible Minor Negative Impact	Possible Neutral Impact or None
Settlements	5	0	0	2	3
Tourist Routes	9	0	1	3	5
Walking Routes	32	0	0	8	24
Hill Tracks	5	0	0	2	3
Rights of Way	22	0	2	4	16
Core Paths	71	0	9	10	52
Cycling Routes	21	0	0	3	18
Horse Riding	3	0	0	1	2
Climbing Routes	2	0	0	0	2
Munros and Corbetts	9	0	0	7	2
Golf	3	0	0	1	2
Fishing – Rivers and Lochs	17	0	1	2	14
Forest Parks/Nature Reserves	7	0	2	1	4
Estates	8	0	2	1	5
Events	18	0	0	2	16
Visitor Attractions	18	0	0	2	16
Activity Centres	35	0	0	1	34
Accommodation	153	0	0	37	116
Total	<b>438</b>	<b>0</b>	<b>17</b>	<b>87</b>	<b>334</b>
% of Total	<b>100</b>	<b>0</b>	<b>4</b>	<b>20</b>	<b>76</b>

**Table 10.28: Moderate Negative impacts**

Resource		Assessment Criteria
Tourist Routes	B970	Visual impact from road to the east of the village + potential impact during construction
Core paths	LBS1	Visual impact + large number of users x small impact at various points along River Spey + potential impact during construction
	LBS29	Visual impact + large number of users x small impact at various points along B970 from Aviemore to Coylumbridge + potential impact during construction
	LBS33	Visual impact + large number of users x small impact at various points along the path
	LBS34	Visual impact + large number of users x small impact at various points along the path
	LBS36	Visual impact + large number of users x small impact at various points along the path
	LBS42	Visual impact + large number of users x small impact at various points along the path from Aviemore to Inverdrue
	LBS137	Visual impact + large number of users x small impact from the path near Inverdrue Fisheries
	LBS138	Visual impact + large number of users x small impact at various points along the path from Aviemore to Craigellachie NNR
	GR7	Visual impact – distant but large number of users x small impact from Glenmore Forest park
	Rights of Way	HB81
HB82		Visual impact + large number of users x small impact at various points along the path from the Golf Course to Aviemore centre
Fishing	River Spey	Visual impact + small number of users x large impact within close proximity of village + from various points along the river
Parks / Reserves	Cairngorm NP	Presence within CNP + visual impact from various locations + disruption during construction
	Glenmore FP	Visual impact from various locations - distant but large number of users x small impact
Estates	Rothiemurchus	Presence within estate + visual impact from various locations + large number of users x small impact + disruption during construction
	Strathspey	Visual impact in relative proximity + large number of users x small impact

10.14.5

Table 10.29 below sets out the nature of potential positive / beneficial impacts derived from the development of the wind farm, and by type of resource.

Table 10.29: Summary Positive / Beneficial Impact on Tourism and Recreation

	Number of Each Activity / Facility	Possible Major Beneficial Impact	Possible Moderate Beneficial Impact	Possible Minor Beneficial Impact	Possible Neutral Impact or None
Settlements	5	0	2	3	0
Tourist Routes	9	0	2	0	7
Walking Routes	32	0	0	0	32
Hill Tracks	5	0	0	0	5
Rights of Way	22	0	0	0	22
Core Paths	71	0	0	0	71
Cycling Routes	21	0	0	0	21
Horse Riding	3	0	0	3	0
Climbing Routes	2	0	0	0	2
Munros and Corbetts	9	0	0	0	9
Golf	3	0	0	3	0
Fishing – Rivers and Lochs	17	0	0	2	15
Forest Parks/Nature Reserves	7	0	0	7	0
Estates	8	0	1	7	0
Events	18	0	0	18	0
Visitor Attractions	18	0	0	18	0
Activity Centres	35	1	1	33	0
Accommodation	153	0	6	145	2
Total	437	1	12	239	186
% of Total	100	0	3	55	42

10.14.6 In terms of impact, overall there would be minimal significant beneficial impacts derived from An Camas Mòr. Overall 3 % (13) of tourism and recreation facilities would have a major or moderate and significant beneficial impact, while 97 % would experience no significant positive impact.

10.14.7 In each of the impacts assessed as major and moderate positive, these are as a result of the potential increase in population, improved market prospects and investment, increase in turnover and profitability. In addition, the new village's population would improve recruitment prospects in these businesses.

10.14.8 The nature of the impacts and assessment criteria are set out in summary in 10.30.

**Table 10.30: Major Moderate and Significant Positive impacts**

Resource		Assessment Criteria
Settlements	Aviemore	Increased population, markets and business
	Inverdrue and Coylumbridge	Increased population, markets and business
Tourist Routes	Strathspey railway	Increased patronage & turnover
Estates	Perth to Inverness Railway	Increased patronage & turnover
	Rothiemurchus	Consolidation of estate revenue & asset & increased visitor spend
Activity Centres	Biking	Increased patronage & turnover
	Skiing & Outdoors	Increased patronage & turnover
Accommodation	6 hotels in Aviemore & Coylumbridge	Increased business & turnover

contribution to the prosperity and wellbeing of both the Badenoch & Strathspey area and the Highlands.

10.31: Overall Additional Quantitative Socio-Economic Impacts

Socio-Economic Impact	Total
Gross Jobs (FTEs)	1,728
Net Additional Local Jobs (FTEs) – TTWA	1,171
Net Additional Local Jobs (FTEs) – Scotland	1,330
Growth in GVA – TTWA (per annum)	£16.4-21.4m
Growth in GVA – Scotland (per annum)	£18.6-24.3m
Tax Revenue – Business (per annum)	£1.148m
Tax Revenue – Residential (per annum)	£3.124m
Retained Retail Expenditure (per annum)	£2.942m
Affordable Housing (units)	375
Construction Jobs (FTEs)	N/A
Private Sector Investment (£m)	N/A

## 10.15 Summary of Impacts

10.15.1 In summary the overall impacts as a result of the proposed development are as follows.

### Socio-economic and Business Impacts

10.15.2 It is concluded that An Camas Mòr is likely to generally have minor to moderate positive impacts upon the wider business community, particularly in terms of enhanced turnover from new business, and potentially moderate to major positive impacts upon the recruitment of staff through new population and also the provision of affordable housing.

10.15.3 The limited concerns expressed by the business community were directed at potential minor negative impacts through greater use of facilities and activities, and possible traffic congestion, as well as the potential visual impact from the north end of Aviemore.

10.15.4 The business community's views are also set within context of the views of consultees, that An Camas Mòr would potentially provide a major dynamic for socio-economic diversification and enhancement of the local and wider area, potentially encourage and enable higher level educational opportunities in the area, and provide a marketing opportunity and focus to encourage new investment into Badenoch & Strathspey.

### Overall Socio-Economic Benefits

10.15.5 The overall quantitative socio-economic benefits derived from the development of An Camas Mòr, have been assessed and estimated within the An Camas Mòr Socio Economic impact Report, and are set out in Table 10.31 below, which would make a significant positive

10.15.6 No significant negative effects upon community facilities have been identified within this assessment.

10.15.7 Therefore it can be concluded that there would be no significant negative socio-economic or community impacts upon the local and wider area.

### Tourism and Recreation Impacts

10.15.8 There are no major negative tourism and recreation impacts as a result of An Camas Mòr, 17 (4%) moderate negative tourism and recreation impacts, and 421 (96%) minor or negligible negative impacts. In addition, there would be negligible positive significant major and moderate recreational impacts, with 3 % (13) of facilities would experience a major or moderate beneficial impact, while 97 % would experience no significant positive impact

10.15.9 Therefore it is concluded that there are would be minimal (4%) significant negative / adverse impacts upon tourism and recreation resources as a result of the development of An Camas Mòr.

### Proposed Mitigation Measures

10.15.10 The following (draft) mitigation measures are proposed for the settlement:

## Construction Mitigation

- 10.15.11** Construction of An Camas Mòr would be programmed wherever practicable to avoid particularly sensitive locations, tourist / visitor viewpoints, and corridors at peak visitor or tourist periods, and would act as mitigation of the effect of the proposals. Where possible, construction would be programmed to avoid significant construction traffic on key routes in the proximity of festivals and events of note.
- 10.15.12** The contractors would be required to ensure ongoing safe access to all key walking and cycling routes, etc, and provide an alternative if any route was closed temporarily due to construction activities. These key routes are set out in detail in Technical Appendices.
- 10.15.13** In terms of the development of the village, every effort would be taken in ensuring that local businesses can be offered the opportunity of participation in its construction, to retain economic benefit and spending locally, and to provide training and job opportunities for local enterprise. This would be a subject for further consideration as the means of procurement are considered and developed.
- 10.15.14** Construction mitigation would be monitored by the CNPA as part of the planning consent, attached conditions, and legal agreement.

## Permanent Mitigation

- 10.15.15** An Camas Mòr would be 'micro-sited' to minimise tourism or recreation effects in areas of particular sensitivity or views, by using the natural features in the landscape to minimise impacts upon tourist / visitors' views.
- 10.15.16** The socio-economic rationale for the village is one of a high quality living, working, and playing environment, with extensive opportunities for living and working in close proximity, and to minimise the need for commuting into and out of the village. The provision of employment space on the basis described above is intended to maximise local living and working opportunities, and minimise the need for commuting. In addition, the rationale of the diversified economic nature of the village would assist the local business and general community in providing a more robust economy and more resilient to economic pressures.
- 10.15.17** The assessment tests the Local Plan proposal that the development would include the provision of space for housing, social and community facilities, commercial, business uses and recreation. This would result in a lower than average level of daily commuting by car.
- 10.15.18** Further, the provision of affordable housing in An Camas Mòr would address the difficulties within the local labour market of a shortage of appropriate and affordable housing to accommodate the local labour force, and lead to both reductions in the need to commute to work in the Aviemore / An Camas Mòr area, and also in further pressure for housing development in the Badenoch & Strathspey part of the National Park.
- 10.15.19** It is also intended that the ethos of the development, focussing upon sustainable development principles, energy efficiency and good practice, would not only assist in reducing the environmental impact of the village upon the wider National Park, but also provide economic and job opportunities for the local population and enhance business investment locally.

## 10.16 Residual Effects

- 10.16.1** The following residual effects have been identified from the development of An Camas Mòr.

### Minor Negative / Adverse

- Increased use of the surrounding woodland / forest (particularly outside the main holiday seasons) would increase the interaction with forest operations and could have an impact on the costs of managing health & safety;
- Increased use of the public roads would lead to a greater interaction with forestry vehicles which could lead to restrictions in their use;
- Increased use of the woodland / forests for recreation could lead to greater environmental disturbance; and
- Increased use of the path network (particularly in poor weather conditions) could lead to increased maintenance costs.

### Minor Positive

- Increased use of the woodland / forest could lead to increased income from recreational businesses based in the forest.

### Major Positive

- Increased affordable housing stock would assist staff of local businesses in finding local accommodation.

### Minor-Moderate Positive

- Enhanced turnover from new business supported by the new population of An Camas Mòr and visitors attracted to the area by the development; and
- Increased turnover and positive impacts upon the recruitment of staff through new population and provision of affordable housing alleviating shortage of skilled labour.

### Major Positive

- Increased affordable housing stock would assist staff of local businesses in finding local accommodation
- Increased turnover and positive residual impact upon local business

## **10.17 Cumulative Effect**

**10.17.1** There would be a significant beneficial improvement in local economic conditions and performance.

## **10.18 Conclusions**

**10.18.1** The conclusion of this assessment is that the development of An Camas Mòr would not have any significant negative / adverse residual socio-economic, tourism and recreation, or community facilities effects upon the local Aviemore, or wider Badenoch & Strathspey, or National Park area or communities.

**10.18.2** On the contrary the proposed development would focus upon the unique opportunity afforded by An Camas Mòr in addressing the need for both affordable housing, and the attraction of higher income employment in the central Highlands.

**10.18.3** Through the creation of a well planned settlement, and high quality of life, the proposed development would assist in the retention of the higher educated population which has historically left the area for jobs elsewhere, attract new skills and economically active population to generate new and additional jobs, raise income levels, offer the opportunity to transform perceptions, attract new investment, and also offer prospects of expansion of existing businesses.

**10.18.4** The effects experienced by socio-economic and community, and tourism and recreation resources, are as shown in the Appendices.