The Highland Council
Comhairle na Gàidhealtachd

West Highland and Islands Local Development Plan Monitoring Statement

Plana Leasachaidh Ionadail na Gàidhealtachd an Iar agus nan Eilean Aithris Sgrùdaidh

April 2016

www.highland.gov.uk

WEST HIGHLAND AND ISLANDS LOCAL DEVELOPMENT PLAN

MONITORING STATEMENT

1 INTRODUCTION

The Highland Council is preparing a West Highland and Islands Local Development Plan (WHILDP, or the Plan, for short) as the new, locally detailed land use plan to guide development. It is expected that the Plan will be adopted in 2016 and the vision will extend until 2035. We will be required to review the Plan at least every 5 years. The Plan will replace the West Highland and Islands Local Plan (2010) and the Wester Ross Local Plan (2006), both as amended by the Highland-wide Local Development Plan adopted on 5th April 2012. It will operate alongside the Highland-wide Local Development Plan and various Supplementary Guidance documents.

This monitoring statement provides part of the analysis of the performance of the current development plan and, where appropriate, the immediate predecessor development plan and it conforms to Planning Circular 6/2013: Development Planning. It does not attempt to cover every single aspect of the Plan as a wide range of additional reports, plans and strategies are available. It uses the best available, consistent, long term information covering the currency of these Plans and concentrates on the most important outcomes of the previous Local Plans such as population, housing and the economy. It should be noted that whilst this monitoring statement is being published alongside the WHILDP Main Issues Report (MIR), the information in it has been gathered over a period of time to inform recent preparation of the MIR and, as such, the information may not be the most up-to-date available as at the publication date of November 2015.

If you have any queries on this document please contact Cameron Thomas, Research Officer, on 01463 702507 cameron.thomas@highland.gov.uk

2 LINKS TO OTHER DOCUMENTS

A number of other documents and information sources are available to support the Development Plan process. We are in the process of replacing our 2012 Highland Wide Local Development Plan and the Housing Need and Demand Assessment, Equalities Impact Assessment, Strategic Environmental Assessment and Monitoring Statement are all available at:

Replacement Highland Wide Local Development Plan

Highland's Single Outcome Agreement identifies areas for improvement and aims to deliver better outcomes for the people of the Highlands and Scotland through specific commitments made by the Council, its community planning partners and the Scottish Government.

Highland SOA

Other key documents include:

a) Highland's 2014 Housing Land Audit:
[Housing Land Audit]

b) Housing Need and Demand Assessment:
[Housing Need and Demand Assessment]

c) Profiles of our 22 Wards:
[Ward profiles]

d) Unemployment and Benefits web pages:
[Benefits and Unemployment]

e) School Roll Forecasts:
[School roll forecasts]

e) Various Briefing Notes giving additional background information:
[Briefing notes]

3 NOTE ON THE GEOGRAPHIC AREAS USED FOR THE PRESENTATION OF INFORMATION IN THIS STATEMENT

The boundaries of the Plan area follow natural boundaries, and these are often not consistent with the boundaries used as standard for the collection and reporting of information. In particular:

- Data zones are the Scottish Government's standard geography for publishing local statistics and the Plan area contains four zone fragments with zero population, three where the majority of the population is outwith the Plan area, and 8 where the majority of the population is inside the Plan area. Where information for data zones is aggregated on a "best fit" only whole or majority zones are considered.
- The settlements of Strathpeffer, Contin, Garve and Strath Conon are within the West Ross Housing Market Area but outwith the WHILDP Plan area, and covered by the Inner Moray Firth (IMF) Local Development Plan. Around 74% of the housing stock in the West Ross HMA lies within the WHLDP Plan area (3,862 out of 5,246 houses). Note that there are some small apparent inconsistencies between figures quoted in the WHILDP and IMF Plans as they have different base dates, and the 2011 Census has resulted in significant revisions to population estimates.
- A small part of the Badenoch Strathspey HMA lies with the WHILDP Plan area comprising 20 out of 7,234 houses (0.03%). In most cases this part of Badenoch & Strathspey is excluded from the information that follows as any data is not reliable at this level.

4 OVERVIEW OF THE WHILDP AREA

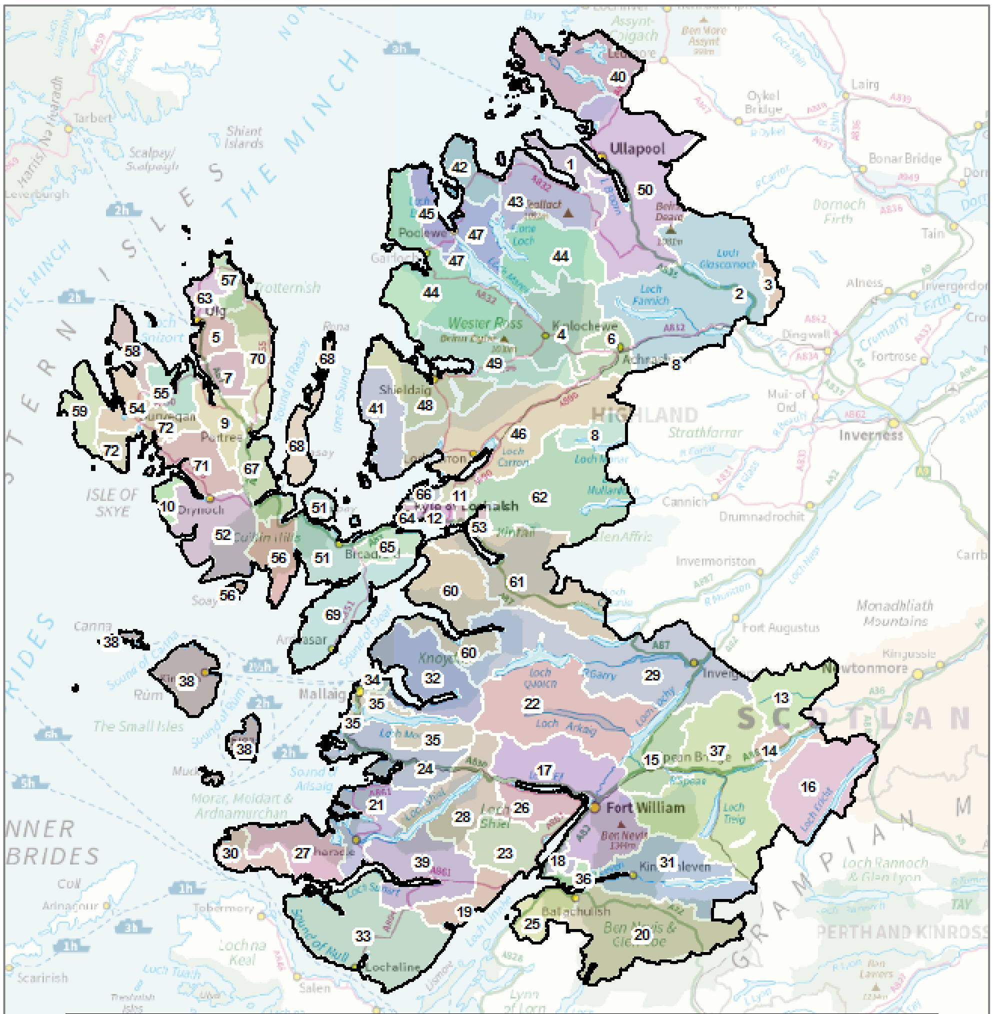
Around 39,000 people – 17% of the Highland population – live in the Plan area, which covers 11,490 sq kms (15% of the land area of Scotland). Taken overall the population density is 3.9 people per sq km – which compares with averages of 8.7 for Highland and 67.4 for Scotland – but Wester Ross is one of the most sparsely populated areas of Scotland with only 2.4 people per sq km. Table 4-1 below shows that Fort William is the only sizeable town in the Plan area. Some smaller settlements have not been identified in our HwLDP as a service centre, but can play an important part in delivering services in sparsely populated rural communities and are also listed below.

Table 4-1 Settlements

Settlement	HwLDP Settlement Status	Population
Fort William	Sub-Regional Centre	10,450
Fort William Town	-	*5,830*
Caol, Banavie, Corpach	-	*4,620*
Portree	Sub-Regional Centre	2,410
Ullapool	Local Centre	1,510
Kinlochleven	Local Centre	900
Mallaig	-	780
Broadford	Local Centre	760
Ballachulish	-	650
Kyle of Lochalsh	Local Centre	650
Gairloch	Local Centre	647
Spean Bridge	-	570
Lochcarron	Local Centre	527
Dunvegan	-	250
Strontian	Local Centre	179
Lochaline	-	171
Acharacle	Local Centre	146
Invergarry	-	145
Achiltibuie	-	98
Shieldaig	-	88
Applecross (& Milton)	-	55
Population source: National Records of Scotland mid 2012 Population Estimates for Settlements, and Highland Council Settlement Development Area Populations 2012		

For monitoring purposes, the Council has divided its area in to 183 *settlement zones* made up of a populated centre plus the surrounding rural area. These zones have consistent boundaries through time and are used at times in this Statement to give detailed local information. Settlement zones in the Plan area are shown on Map 1 below.

Map 1Settlement Zones



1	Scoraig	16	Dalwhinnie (part)	31	Kinlochleven	46	Lochcarron	61	Inverinate
2	Garve	17	Fort William	32	Knoydart	47	Poolewe	62	Killilan
3	Evanton (fragment)	18	Onich	33	Lochaline	48	Shieldaig	63	Kilvaxter
4	Kinlochewe	19	Kingairloch	34	Mallaig	49	Torridon	64	Kyle
5	Uig	20	Glencoe	35	Morar	50	Ullapool	65	Kyleakin
6	Achnasheen	21	Acharacle	36	North Ballachulish	51	Broadford	66	Plockton
7	Kensaleyre	22	Achnacarry	37	Roy Bridge	52	Carbost	67	Portree
8	Strathconon (part)	23	Ardgour	38	Small Isles	53	Dornie	68	Raasay
9	Skeabost Bridge	24	Arisaig	39	Strontian	54	Dunvegan	69	Sleat
10	Portnalong	25	Ballachulish	40	Achiltibuie	55	Edinbane	70	Staffin
11	Achmore	26	Camusnagaul	41	Applecross	56	Elgol	71	Struan
12	Balmacara	27	Glenborrodale	42	Aultbea	57	Flodigarry	72	Vatten
13	Laggan (part)	28	Glenfinnan	43	Dundonnell	58	Geary		
14	Kinlochlaggan (part)	29	Invergarry	44	Gairloch	59	Glendale		
15	Spean Bridge	30	Kilchoan	45	Inverasdale	60	Glenelg		

Settlement Zones

1:1,000,000

20 10 0 20 Kilometers

1 cm = 10,000 metres

The Highland Council
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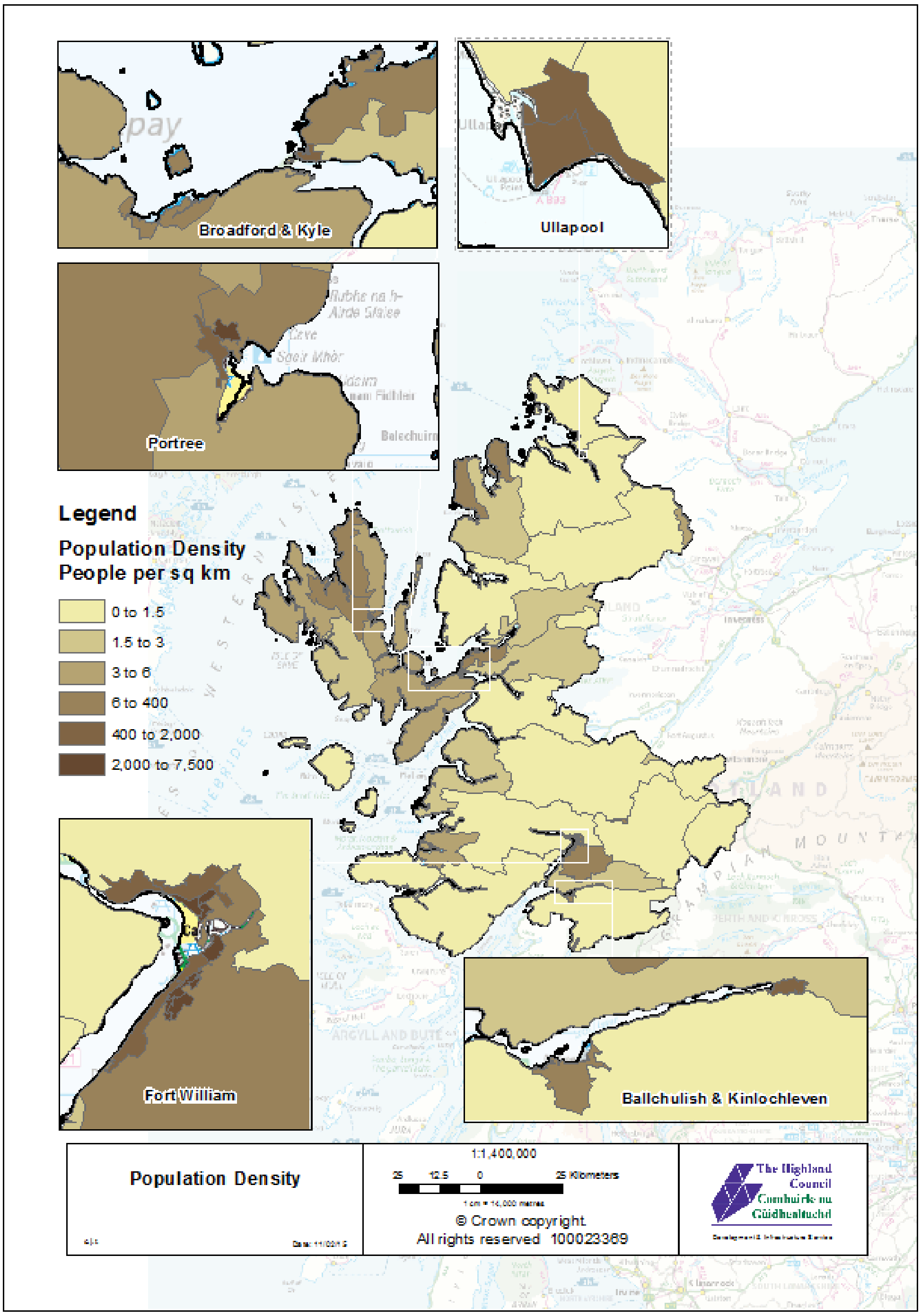
Development & Infrastructure Service

5 POPULATION

5.1 Current Population

Map 2 below shows the population density, by data zone, across the Plan area. It shows that parts of the area are very sparsely populated with as few as one person per square kilometre. The most populated areas are around the coast and along some of the flatter valley bottoms, although the population of Skye is more evenly distributed.

Map 2 Population Density by Data Zone



5.2 The Age Profile of the Current Population

Highland has a population which is “older” than that of Scotland overall. We have a lower percentage of people aged 16 to 44 and a correspondingly higher percentage aged 45 and above. The net result is that the Plan area has a population which is older than that of both Highland and Scotland overall, as shown in the Table 5-1 below.

Table 5-1 Total Population by Age Group
2011 Census as a percent of the total population

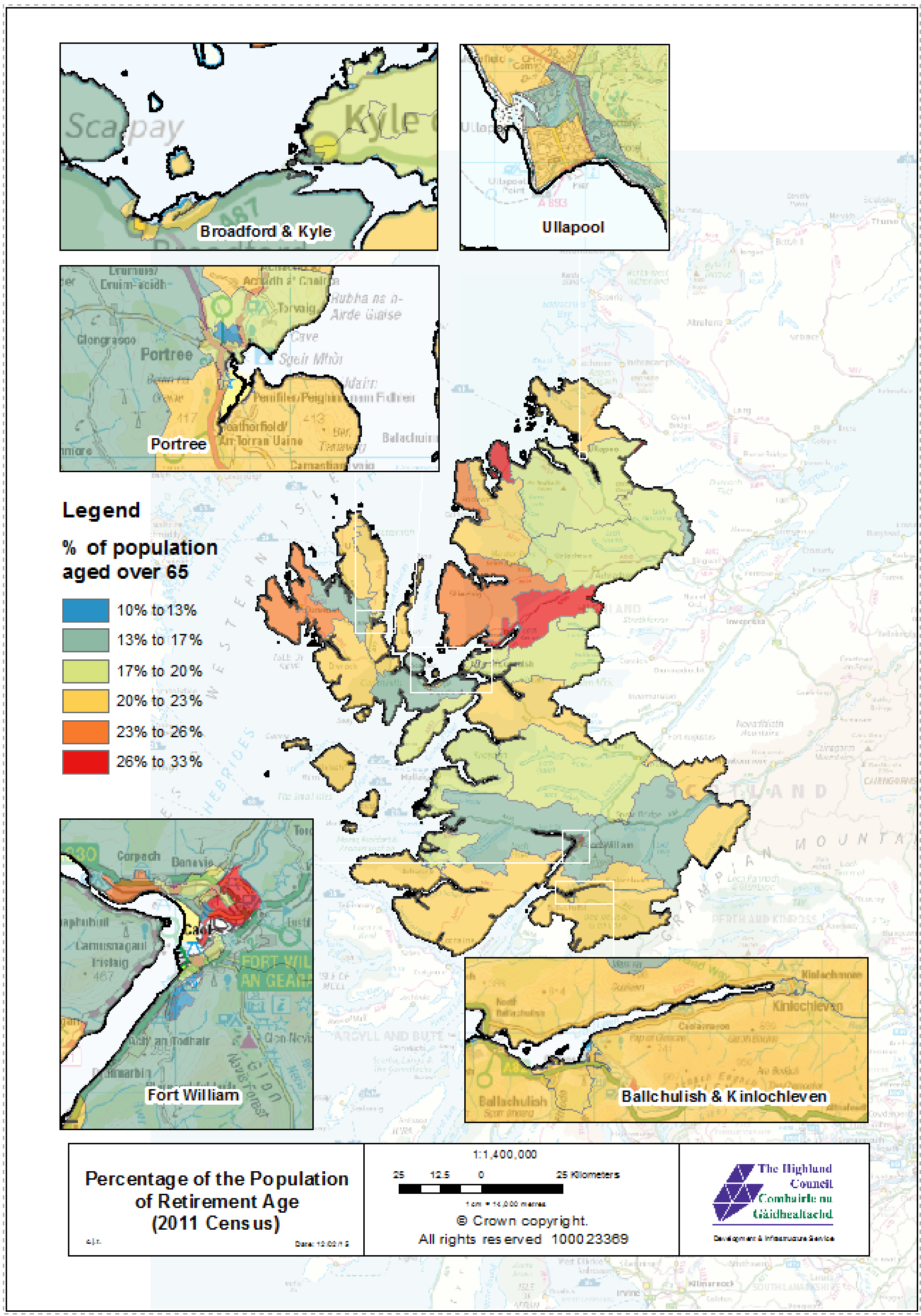
	WHILDP	WHILDP	*Highland*	*Scotland*
	Number	**Percent**	***Percent***	***Percent***
0 to 15	6,581	16.8	17.4	17.1
16 to 44	11,646	29.7	32.8	37.6
45 to 64	12,641	32.2	29.8	27.5
65 to 74	4,856	12.4	11.3	9.8
75+	3,477	8.9	8.7	8.0
All Ages	39,201	100.0	100.0	100.0
Source: Highland Council based on National Records of Scotland Small Area Population Estimates 2013				

These average figures mask local variation and this is shown in the table and map below. Table 5-2 shows that Wester Ross, Strathpeffer & Lochalsh Ward has the lowest percentage of children and the highest percentage of retired people, and that Fort William & Ardnamurchan has the second highest percentage of children and lowest percentage of retired people. Over the last decade, birth rates in Lochaber have been the highest of all Highland areas. In general, remote rural areas tend to have an older age profile than more urban areas, although there are exceptions to this. Map 3 below shows that the percentage of retired people varies from 9% to 12% in Fort William (Plantation, Upper Achintore and Argyll Road) to around 30% in Camaghael & Lochyside, Lochcarron and Aultbea.

Table 5-2 Age Profile of Wards

Ward	0 to 15	16 to 44	45 to 64	65 to 74	75+	All people (100%)
Caol and Mallaig	17.9	31.7	30.4	11.2	8.8	8,294
Eilean a Cheo	16.1	28.2	34.3	13.0	8.4	10,384
Ft William and Ardnamurchan	17.8	32.8	29.7	11.8	7.8	11,649
Wester Ross, Strathpeffer & Lochalsh	15.2	25.5	34.9	13.5	10.9	8,874
WHILDP Plan Area	**16.8**	**29.7**	**32.2**	**12.4**	**8.9**	39,201
Highland	*17.4*	*32.8*	*29.8*	*11.3*	*8.7*	*232,950*
Scotland	*17.1*	*37.6*	*27.5*	*9.8*	*8.0*	*5,327,700*
Source: Highland Council based on National Records of Scotland Small Area Population Estimates 2013						

Map 3 Percentage of the Population of Retirement Age



5.3 Population Change

Table 5-3 shows that during the decade to 2013, the population of the Plan area grew by 1,936 people, an increase of 5.2% which compares with increases of 10.1% and 5.1% for Highland and Scotland respectively. The population of Wester Ross, Strathpeffer & Lochalsh was stable and the highest growth was in Eilean a Cheo (8.8%) and Caol and Mallaig (7.9%).

A consistent pattern across all Wards in the Plan area is a fall in the percentages of the population aged 0 to 15 and 16 to 44 and a corresponding increase in the over 45 age groups, with the most extreme changes in Wester Ross, Strathpeffer & Lochalsh.

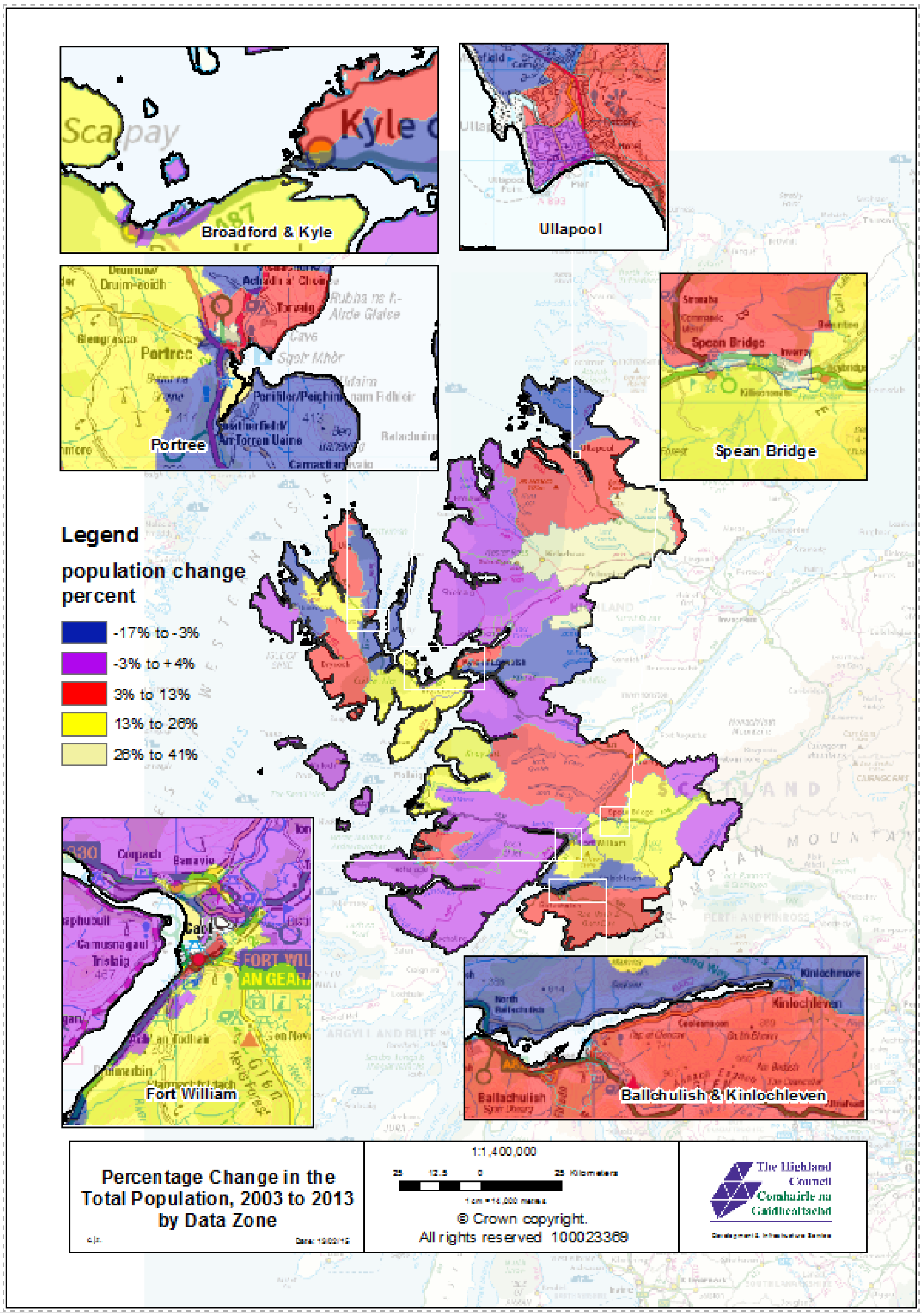
Table 5-3 Population Change by Age Group - 2003 to 2013 Numbers

Ward	0 to 15	16 to 44	45 to 64	65 to 74	75+	All people	All people %
Caol and Mallaig	-15	-54	321	121	234	607	7.9
Eilean a Cheo	-96	-213	622	525	3	841	8.8
Ft William and Ardnamurchan	-40	-174	289	319	96	490	4.4
Wester Ross, Strathpeffer & Lochalsh	-339	-558	432	220	243	-2	0.0
WHILDP Plan Area	**-490**	**-999**	**1,664**	**1,185**	**576**	**1,936**	**5.2**
Highland	*434*	*236*	*10,142*	*6,225*	*4,273*	*21,310*	*10.1*
Scotland	*-34,428*	*-24,019*	*189,289*	*69,801*	*58,557*	*259,200*	*5.1*
Source: Highland Council based on National Records of Scotland Small Area population estimates 2003 revised and 2013							

Map 4 below shows population change, by data zone over the last decade and gives a mixed picture across the Plan area. The area experiencing the fastest rate of population growth was Portree North (41%) where there was significant new housebuilding. Spean Bridge also saw significant growth (35%), linked more to general demographic change and increased family size with resultant pressure on the primary school capacity.

The areas with the greatest population decline were Kyle of Lochalsh, Skye North East and Skye East and Raasay (-17.1%, -8.8% and -8.8% respectively). One interesting feature is that the more established urban areas do not seem to have seen the same level of population decline, as families mature and children move away, that we have seen elsewhere in Highland.

Map 4 Percentage Change in the Total Population, 2003 to 2013

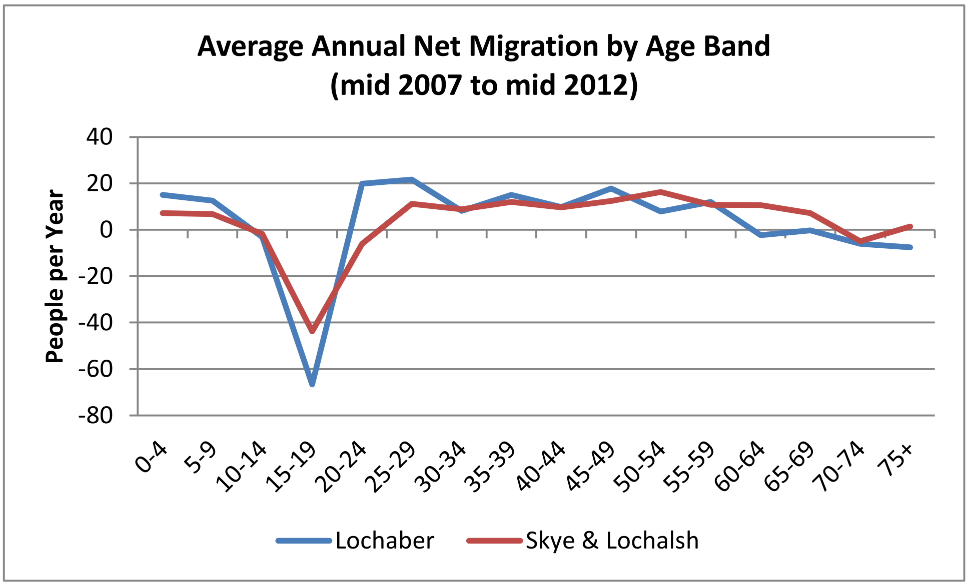


5.4 Migration to and from the Plan Area

During the decade to 2013 there were 4,157 deaths in the Plan area and 3,651 births: an average deficit of 50 per year, with more deaths than births in each year despite an increase in the birth rate from 2007 onwards in line with national trends. Given that the overall population profile is ageing, and the number of mothers of child bearing area is falling, the deficit can only increase and the population of the Plan area will fall unless people are attracted to move into the area.

Information on migration to and from eight areas in Highland – the former District Council areas – is supplied to the Council by National Records of Scotland for use in population forecasting. Net migration by age band is shown in the chart below for Lochaber and Skye & Lochalsh. Equivalent information is also available for Ross & Cromarty but this cannot be broken down to the constituent HMAs, which include West Ross, and alternative techniques are used for population projections. During the five year period from mid 2007 to mid 2012 the number of people moving into the Plan area exceeded the number of people moving out, with Lochaber gaining an average of 54 per year and Skye & Lochalsh gaining 58 per year. Figure 5-1 below shows the age profile of the net migrants. In common with the rest of Highland the Plan area loses over 100 each year young people in the 15 to 19 age group and gains around 200 people each year spread across the 25 to 60 age group. In addition, Lochaber is particularly successful in attracting young people in their early 20s, probably linked to the outdoor industry.

Figure 5-1 Average Annual Net migration



Source: National Records of Scotland

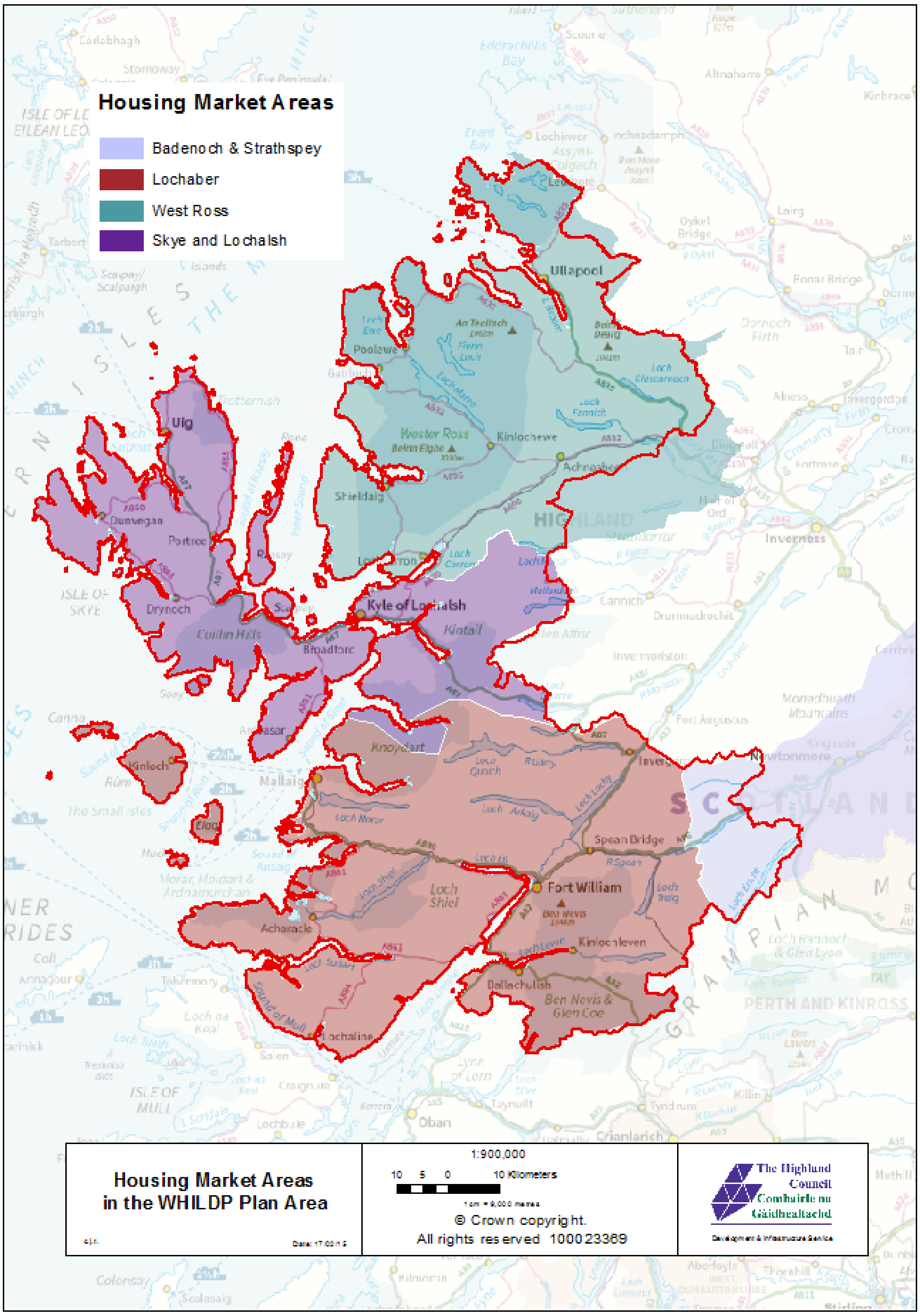
6 HOUSING - BACKGROUND

6.1 Housing Market Areas (HMAs)

Highland's Housing Need and Demand Assessment shows that there are three Housing Market Areas in the Plan area (Map 5): Lochaber and Skye & Lochalsh are wholly within the Plan area and around there quarters of the housing stock in West Ross is in the Plan area, but only a small fragment of the Badenoch & Strathspey HMA lies in the area (20 houses). The HMAs are also aligned fairly closely with travel to Work Areas although the Gairloch & Ullapool TTWA which includes West Ross also extends northwards to the North Sutherland Coast

However, outside the urban area of Fort William, the WHILDP area is made up of a number of remote rural communities and the distances between them, difficult travelling conditions in bad weather and lack of public transport mean that the area is made up of a number of self-contained smaller sub markets and we need to make sure that the local housing requirement can be met locally.

Map 5 Housing Market Areas



6.2 Housing Stock

In September 2014 there were 21,164 houses in the Plan area and Table 6-1 below gives a breakdown of tenure by Ward using figures from the 2011 Census to give the best available consistent information. It shows that 20.3% of the stock in the Plan area is subsidized affordable stock (either Council or Housing Association) which compares with 18.9% for Highland and 24.3% for Scotland. The highest percentage of affordable housing is in Lochaber, dominated by Fort William where almost a third of the stock is affordable, but the percentage of affordable housing is lower in rural areas. Private renting is less common than in Highland overall.

One notable feature of the Plan area is the high percentage of second / holiday homes, with 17.2% in Skye & Lochalsh and 19.0% in West Ross, and locally over 40% in settlements such as Raasay and Glenborrodale, contributing to a pressured local housing market.

A more detailed table giving the stock within each settlement is available as Table 1 in the Appendix.

Table 6-1 Housing Tenure by Ward

HMA	All Dwellings (1)	% Second Homes (2)	% Vacant (3)	Total Ineffective Stock % (2) + (3)	% Highland Council Stock (4)	% Housing Assn Stock (5)	Total Social Rented % (4) + (5)	Private Rented (6)	Living Rent Free (6)
Lochaber	10,065	10.3	1.9	**12.2**	14.8	9.1	**23.9**	8.0	3.1
Skye and Lochalsh	7,217	17.2	1.9	**19.1**	8.4	10.0	**18.3**	6.9	2.6
West Ross	3,862	19.0	2.7	**21.7**	8.4	5.3	**13.8**	8.0	4.2
WHILDP Total	**21,164**	14.2	2.0	**16.3**	11.6	8.8	**20.3**	7.6	3.1
Highland	*114,606*	5.7	2.7	**8.4**	13.2	5.7	**18.9**	9.9	2.3
Scotland	*2,526,870*	1.5	2.6	**4.1**	13.2	11.1	**24.3**	11.1	1.3
Badenoch and Strathspey	20	14.7	1.9	**35.0**	0.0	0.0	**0.0**	n/a	n/a

(1) Highland Council, Council Tax database Sept 2014; NRS Household Estimates Scotland 2013
(2) 2011 Census
(3) 2011 Census
(4) 2011 Census
(5) 2011 Census
(6) 2011 Census
Figures for Badenoch and Strathspey all from Council Tax records and Licensing Records.

7 PLANNING PRESSURE

Table 7-1 below gives a simple measure of planning activity and looks at the number of applications of all types – from (eg) simple new porches to major extensions and new houses – during the 15 years from 2000 to 2014. It shows that there is a similar level of activity in Skye & Lochalsh and West Ross, but less in Lochaber. It also shows that the level of activity rose during the period of economic and population growth in the early to mid 2000s but fell following the credit crunch in 2008.

Table 7-1 Planning Applications by Housing Market Area, 2000 to 2014

	2000 to 2004	2005 to 2009	2010 to 2014	Housing Stock	Index (Applications per House)
Badenoch and Strathspey	10	33	29	20	3.6
Lochaber	2,647	2,714	2,096	10,065	0.7
Ross and Cromarty West	1,199	1,457	1,171	3,862	1.0
Skye and Lochalsh	1,976	2,622	1,966	7,217	0.9
WHILDP Plan Area	5,832	6,826	5,262	21,164	0.8
Source: Highland Council Records (UNIFORM)					

7.1 New House Completions

Table 7-2 below shows that 3,220 new homes were built in the Plan area between 2000 and 2014, an average of 214 per year. There were 350 completions in the peak year of 2008, more than double the number in the lowest years of 2001 and 2014 (169 and 156 respectively). The housing stock in Skye & Lochalsh increased by 25% during the 15 year period, with 17% growth in West Ross and 14% in Lochaber.

Table 7-2 Number of New Homes Built by HMA, 2000 to 2014

	Badenoch and Strathspey	Lochaber	West Ross	Skye and Lochalsh	Plan Area
2000		60	55	94	210
2001		70	32	67	169
2002		92	32	60	184
2003		86	28	79	193
2004		85	43	96	224
2005		73	28	101	202
2006		94	39	98	231
2007		67	47	99	213
2008		119	40	191	350
2009		94	56	105	255
2010		66	38	109	214
2011		86	25	124	235
2012		93	27	85	205
2013		62	37	71	170
2014	6	55	29	66	156
All Years	**6**	**1,205**	**558**	**1,449**	**3,220**
% Increase in Stock	42.9	13.6	16.9	25.1	17.9
Source: Highland Council records					

Table 2 in the Appendix gives a detailed analysis on the location of new house completions by settlement zone, and a summary by HMA for the Plan area is given in Table 7-3 below. It shows that, out of 3,220 completions from 2000 to 2014, 52%

were on allocated sites, giving 48% of all completions that were effectively windfall[1]: just over half of these windfall sites were within settlement development areas (SDAs). The picture is mixed but in general the percentage of completions on allocated sites is higher in more urban areas, with 72% of completion in Fort William on allocated sites.

Table 7-3 Percentage of New House Completions by Type of Site, 2000 to 2014

Housing Market Area	All Completions (100%)	Completions on Allocated Sites	Completions not on Allocated Sites (Windfall)	Completions not on Allocated Sites but within SDA	Completions not on Allocated Sites, not in SDA, in Hinterland Area
Badenoch and Strathspey	6	0	100	0	0
Lochaber	1,205	49	51	18	4
Skye and Lochalsh	1,449	69	31	16	0
West Ross	558	13	87	69	0
All Completions	3,220	52	48	26	2

On average there were 103 windfall completions per year over the 15 year period, with the distribution by HMA as follows:

- Lochaber 41
- Skye & Lochalsh 30
- West Ross 32

7.2 Renewable Energy - Windfarms

Map 6 below shows the locations of operational windfarms in the area in December 2014, classified using the five categories given in our Onshore Wind Energy Interim Supplementary Guidance 2012. At the time of preparing this Statement, information on micro schemes is still being collated and therefore these schemes are not shown (initial findings are that there are 27 Micro schemes in the area).

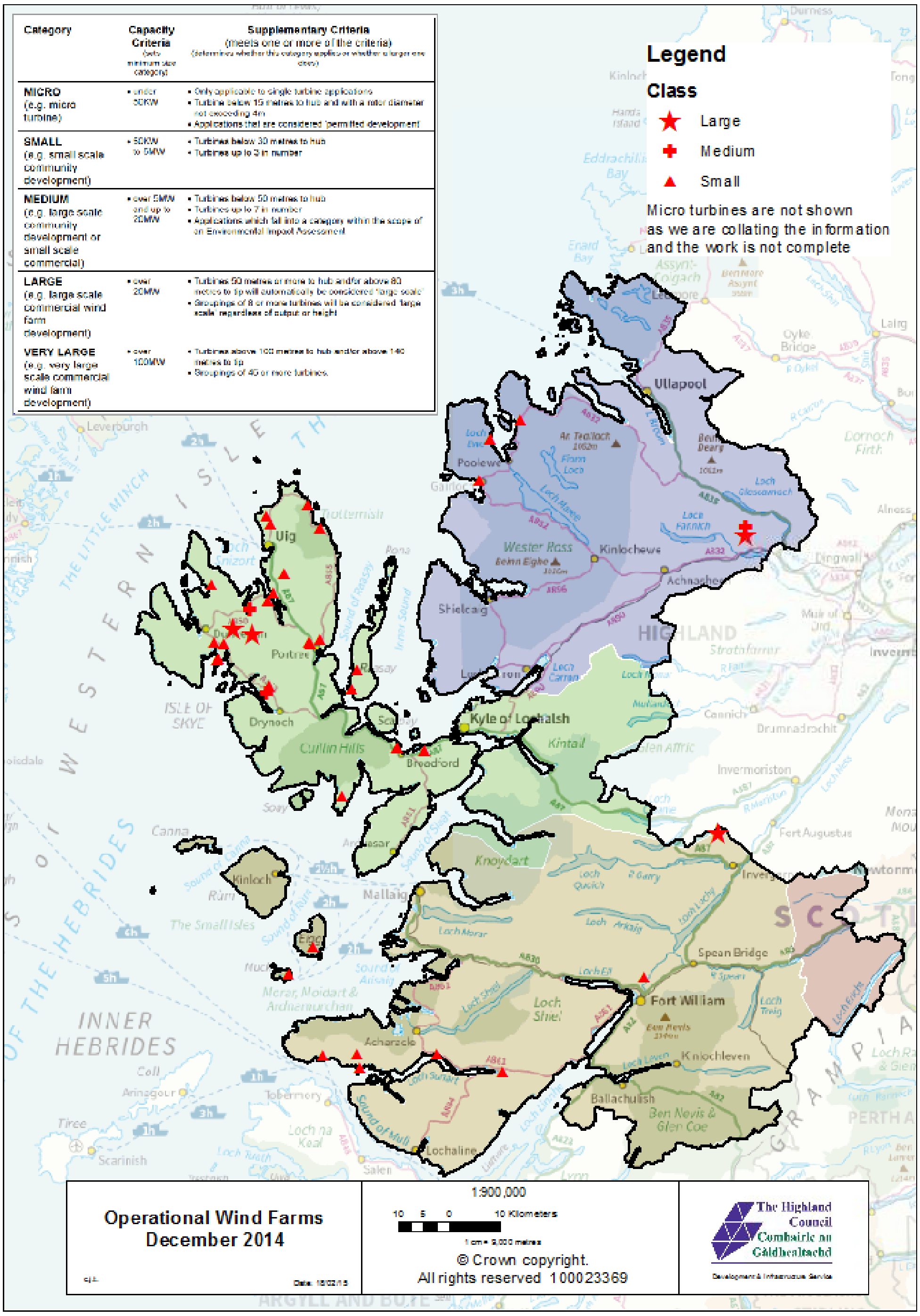
There are currently 41 Small and larger windfarms in the Plan Area with 26 having a single turbine. In total there are 129 individual turbines with a combined generating capacity of 15,000 KW. Table 7-4 gives details of the large[2] schemes in the area.

Table 7-4 Large Windfarm Schemes

Scheme Name	kW	Number of Turbines
Ben Aketil Wind Farm	2,300	12
Lochluichart Wind Farm	3,000	17
Edinbane Wind Farm	2,300	18
Millennium Wind Farm	2,500	19

[1] Windfall sites are sites which were not allocated in previous Local Plans and where planning permission has been granted on the basis of general policies.
[2] Between 20MW and 100MW: Turbines 50 metres or more to hub and/or above 80 metres to tip are automatically considered 'large scale'. Groupings of 8 or more turbines are considered 'large scale' regardless of output or height.

Map 6 Operational Windfarms (December 2014)



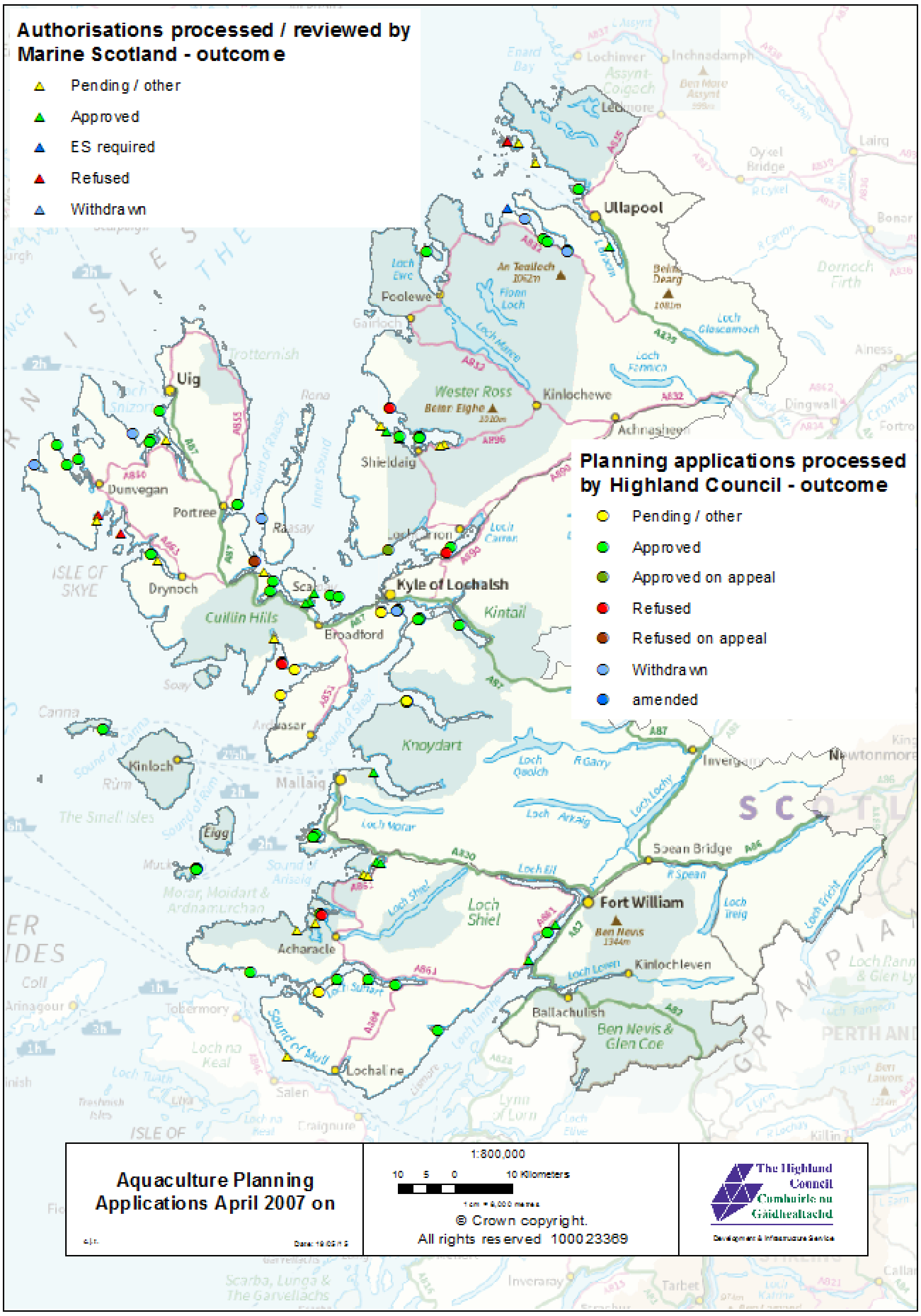
7.3 Aquaculture

Prior to 1st April 2007 authorisations for aquaculture were processed by the Crown Estate, from this date onwards they have been managed through planning applications to the Council with the first application under the new legislative process received in September 2007. Since April 2007 outstanding applications to the Crown Estate have been processed by Marine Scotland who have also reviewed and audited some previous Crown Estate authorisations. The number of formal applications processed and their outcome is shown in Table 7-5 below and their locations in Map 7. In addition to the 69 full applications shown below the Council has also received 51 requests for screening / scoping advice, 7 prior notifications under permitted development rights, and 44 consultations from Marine Scotland on sites that they are auditing or reviewing.

Table 7-5 Outcome of Aquaculture Planning Applications and Authorisations April 2007 to May 2015

Outcome	Highland Council Planning Application	Marine Scotland Audit / Review	Total
Approved	50	12	62
Approved on appeal	1		1
Environmental Statement Required		2	2
Refused	5	3	8
Refused on appeal	1		1
Withdrawn	7	1	8
Pending / Other	5	17	22
Total	69	35	104

Map 7 Aquaculture Planning Applications and Authorisations



8 HOUSE SALES

8.1 Affordability

The Scottish Government's Centre for Housing Market Analysis supplies the Council with an annual data pack containing:

- Information on each house sale in Highland giving the type of sale, location of the house, the origin of the buyer and the sale price (from the Registers of Scotland *LandVals* data); and
- Until 2013, information on household incomes, by *intermediate zone*[3], from the Paycheck dataset marketed by CACI. (More information on income is given later).

Income date for intermediate zones can be converted to the equivalent for other more meaningful geographic areas through the use of computer based mapping, albeit with some loss of accuracy, and compared with typical house prices to produce a measure of affordability.

We monitor affordability using a combination of the income and house sales data described above, using the benchmark of a mortgage for a lower quartile price house that is 4 times the lower quartile joint household income (these are the measures used by the Scottish Government's Centre for Housing Market Analysis). Map 8 below is an extract from a Highland map and shows that in 2012 and 2013 the entire Plan area was classed as *unaffordable* or *highly unaffordable*, and modest housing was beyond the reach of households with low incomes (for reference, the only affordable and nearly affordable areas in Highland are in Caithness and North Sutherland).

[3] Standard geographical areas containing between 2,500 and 6,000 people.

Map 8 House Affordability 2012 and 2013

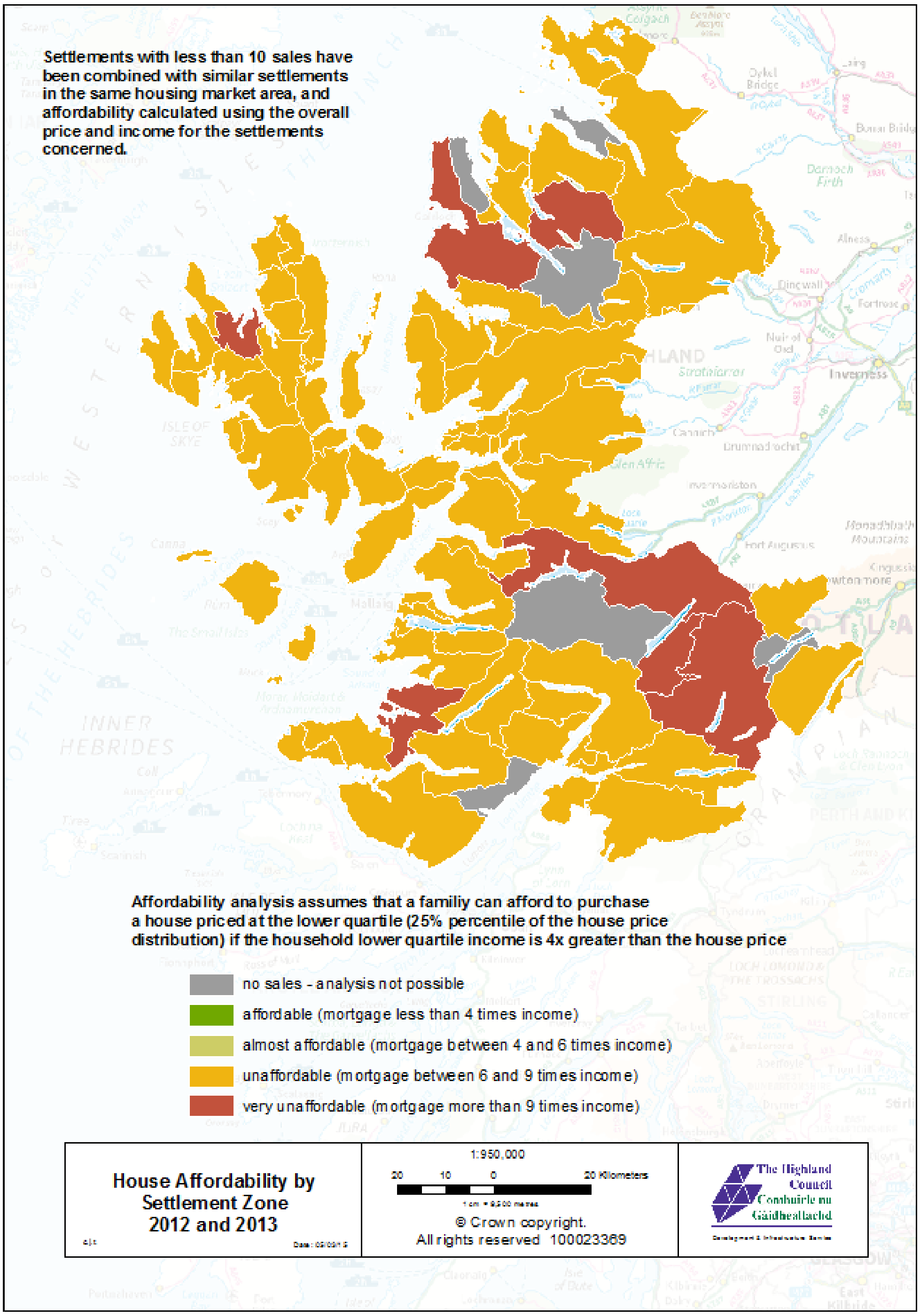


Table 8-1 below gives the number of open market sales during 2013 and the mean and median sale prices, in each ward in the Plan area. It shows that there were 437 open market sales during the year distributed reasonably evenly across the four Wards, albeit with a lower number of sales in Caol and Mallaig. Average sales prices are all above the Highland average but the median sale price (the mid point price, with half of the sales for more than this and half for less) is lower than the Highland average. This is probably due to the availability of relatively low cost former Council and Housing Association stock in Fort William.

Table 8-1 Open Market House Sales 2013

Ward	Mean Sale Price £	Median Sale Price £	Number of Open Market Sales
Wester Ross, Strathpeffer and Lochalsh	£168,400	£155,000	130
Eilean a' Cheò	£156,700	£149,000	120
Caol and Mallaig	£177,500	£136,500	80
Fort William and Ardnamurchan	£163,800	£131,000	107
WHILDPD Plan Area	£163,100	£140,000	437
Highland	*£162,400*	*£147,000*	*2,982*
Scotland	*£170,000*	*£142,500*	*68,821*

8.2 The Origin of House Buyers

The section above on migration can be complemented at a local level by information on the origin of house buyers. Given that incomes in Highland are lower than both the Scotland and UK averages, migrants from elsewhere often bring high levels of equity from the sales of previous houses which gives them greater purchasing power than existing residents, contributing to a stressed market. Table 8-2 below shows the origin of all buyers during the calendar years 2012 and 2013, and is given in greater detail by settlement zone in Table 3 in the Appendix:

- 62% of houses in **Lochaber** were sold to buyers already living in Lochaber, one of the more self contained HMAs in Highland; 65% were sold to buyers from within Highland and 31% to buyers from the rest of Scotland and the UK.
- 41% of houses in **Skye & Lochalsh** were sold to buyers already living in Skye & Lochalsh; 45% were sold to buyers from within Highland and 48% to buyers from the rest of Scotland and the UK.
- 33% of houses in **West Ross** (the entire HMA including the part outwith the Plan area) were sold to buyers already living in West Ross, the least contained housing market in Highland. 52% of sales were to buyers already living in Highland, with 41% to buyers from the rest of Scotland and the UK.

Table 8-2 Origin of House Buyers 2012 and 2013 as Percentage of All Buyers

	Housing Market Area of House Bought		
Origin of House Buyer	**Lochaber**	**Skye and Lochalsh**	**West Ross (all sales in HMA)**
Rest of Scotland	15	21	21
Rest of UK	16	27	20
Overseas	2	2	1
Badenoch and Strathspey	0	0	1
Caithness	0	0	1
East Ross	0	0	1
Inverness	2	1	5
Lochaber	62	1	0
Mid Ross	0	0	9
Nairn	0	0	1
Skye and Lochalsh	1	41	1
Sutherland	0	0	1
West Ross	0	0	33

Total already Living in Highland	65	44	52
Unknown	3	6	6
All Sales (100%)	359	283	164
Source: Registers of Scotland and University of West of Scotland LVIU			

9 THE ECONOMY OF THE PLAN AREA

The economy of Highland has traditionally been based on primary industries such as agriculture; fishing and forestry; seasonal tourism; and the public sector. It has generally not had a strong wealth-generating manufacturing sector, nor has it seen the strong growth in the service sector over the last two decades which has characterised growth in the UK and Scotland in particular through financial services. As a result our economy does not perform as well as the Scotland economy, measured in traditional terms such as GDP per head.

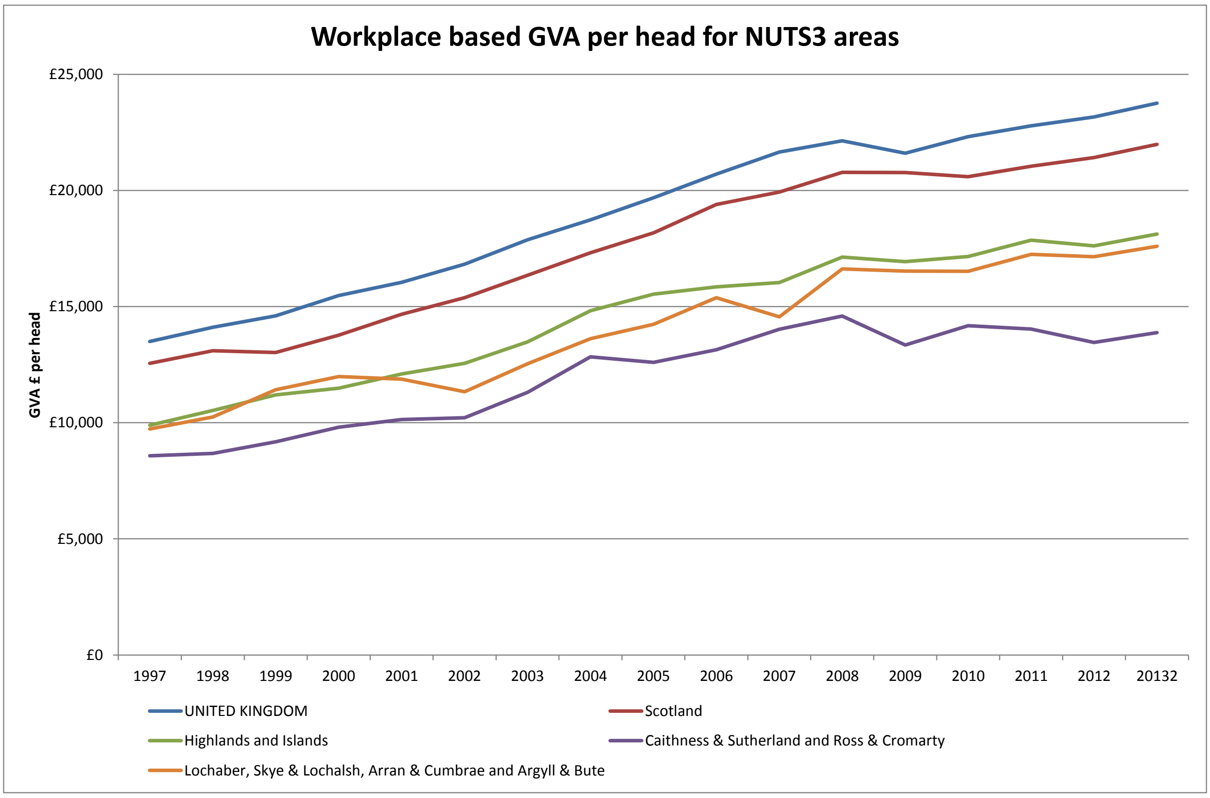
The smallest local scale for which economic performance is published is NUTS3[4] areas, and can be measured as GVA[5] per head. The NUTS3 areas are not a good fit to the Plan area:

- West Ross is a relatively small part of part of Caithness & Sutherland and Ross & Cromarty; and
- Lochaber and Skye & Lochalsh are included with Arran & Cumbrae and Argyll & Bute.

Figure 5-1 below shows that the economic performance of the Plan area is well below the UK and Scotland level, and slightly lower than for the Highlands and Islands (NUTS2) area overall. In particular, the gap between Caithness & Sutherland and Ross & Cromarty and other areas of Highland and Scotland overall has grown over the last decade. The economy of West Ross contributes only a small proportion to the overall GVA of the NUTS3 area and the low growth is likely to be due to issues outwith the area, such as Dounreay decommissioning.

[4] Standard geographic areas used for European statistics "Nomenclature of Units for Territorial Statistics".
[5] Gross Value Added: the difference between the value of goods and services produced and the cost of raw materials and other inputs which are used up in production.

Figure 9-1 Economic Output (GVA)



9.1 Employment

The current profile of jobs in the Plan Area is given Table 9-1 below together with a Highland and Scotland comparison. In order to make use of recently published results from the 2011 Census, these are residence based figures: that is, they relate to the employment of people living in the area rather than the jobs in the area[6].The Census results differ from those given by the Business Register and Employment Survey (BRES) which are published annually but suffer from sample error: for comparison, the Census gives 14.5% of people in the Plan area working in Accommodation and food service activities (group I) whereas BRES gives 22.3%.

[6] Workplace based figures are expected to be among the later releases of Census results.

Table 9-1 Employment
By Ward and 2007 Standard Industrial Classification (broad groups)

People Employed in the Plan Area by Ward and 2007 Standard Industrial Classification (broad groups)							
Industry	**Caol and Mallaig**	**Eilean a' Cheò**	**Fort William And Ardnamurchan**	**Wester Ross, Strathpeffer And Lochalsh (whole Ward)**	**WHILDP Plan Area**	***Highland***	***Scotland***
A Agriculture, forestry and fishing	7.8%	6.8%	5.6%	7.8%	7.1%	4.3%	2.0%
B Mining and quarrying	0.9%	1.0%	1.3%	0.9%	1.0%	1.2%	1.4%
C Manufacturing	5.8%	3.4%	6.3%	4.3%	4.9%	5.7%	7.7%
D Electricity, gas, steam and air conditioning supply	0.6%	0.5%	0.5%	0.7%	0.5%	0.8%	0.8%
E Water supply, sewerage, waste management and remediation activities	1.0%	0.9%	0.7%	0.9%	0.9%	1.3%	0.8%
F Construction	9.0%	10.3%	9.8%	11.3%	10.0%	9.8%	8.0%
G Wholesale and retail trade, repair of motor vehicles and motorcycles	14.3%	12.3%	12.9%	11.5%	12.6%	14.9%	15.0%
H Transport and storage	8.0%	5.6%	5.8%	5.4%	6.3%	5.0%	5.0%
I Accommodation and food service activities	13.2%	13.0%	16.4%	13.6%	14.5%	9.1%	6.3%
J Information and communication	0.9%	2.1%	1.2%	1.7%	1.5%	2.4%	2.7%
K Financial and insurance activities	0.8%	1.0%	0.9%	0.9%	0.9%	1.3%	4.5%
L Real estate activities	1.8%	1.5%	1.7%	1.3%	1.6%	1.3%	1.2%
M Professional, scientific and technical activities	2.4%	4.7%	2.6%	4.8%	3.4%	4.5%	5.2%
N Administrative and support service activities	2.8%	3.3%	3.5%	3.1%	3.2%	4.0%	4.3%
O Public administration and defence, compulsory social security	4.2%	4.5%	4.7%	4.9%	4.4%	6.6%	7.0%
P Education	8.3%	9.7%	8.4%	8.7%	8.8%	7.6%	8.4%
Q Human health and social work activities	12.9%	14.2%	12.4%	12.7%	12.9%	15.2%	15.0%
R, S, T, U Other	5.2%	5.1%	5.3%	5.5%	5.3%	4.9%	4.9%
All people aged 16 to 74 in employment (100%)	7.8%	4,953	5,638	5,959	19,438	*115,270*	*2,516,895*
Indicative % Public Sector (O + P + Q)	25.4%	28.4%	25.5%	26.3%	26.1%	*29.4%*	*30.4%*
Source: 2011 Census							

The public sector is the largest employer in the Plan area. In Table 9-1, industries O, P and Q together approximate to the public sector and the figures show that, in the Plan area, between 25.5% (Fort William and Ardnamurchan) and 28.4% (Eilean a' Cheò) are employed in the public sector, compared with 29.4% and 30.4% for Highland and Scotland respectively. Outside the public sector, tourism is the main employer with 14.5% of people employed in accommodation and food service activities (highland and Scotland 9.1% and 6.3% respectively).

Table 9-2 below shows that 17,500 people were employed in the plan area in 2013 together with the percentage who are full time and the change during the last decade. Across the Plan area as a whole the percentage of full time jobs (60.7%) is below the Highland and Scotland averages (63.1% and 66.8% respectively), although the percentage of full time jobs in Caol and Mallaig (65.4%) is close to the national average. The increase in the number of people employed in Highland over the last decade has been similar to the population increase, but the growth in employment in the Plan area has been lower than the Highland rate (4.3% and 10.7% respectively).

Table 9-2 Percentage of Full Time Employees and Change in the Number of Jobs 2003 to 2013

Ward	Employees 2013	% Full Time 2013	% Change in Total Employees 2003 to 2013
Caol and Mallaig	2,800	65.4	-2.6
Eilean a' Che`o	4,100	55.8	3.9
Fort William and Ardnamurchan	6,600	59.2	10.9
Wester Ross, Strathpeffer and Lochalsh (whole ward)	4,000	60.7	-0.2
WHILDP Plan Area	17,500	59.7	4.3
Highland	104,700	63.1	10.7
Scotland	2,357,800	66.8	2.2
Source: ABI / NOMIS 2003 and BRES / NOMIS 2013			

Results from the 2011 Census (Table 9-3) show that self employment in the Plan area is above the Highland and National averages (15.8%, compared with 11.0% and 7.5% respectively) with the highest rate of self employment in Eilean a' Che`o (18.5%).

Table 9-3 Self Employment

Self Employment	
Ward	**% of People Aged 16 to 74 Who are Self-employed**
Caol and Mallaig	13.0
Eilean a' Che`o	18.5
Fort William and Ardnamurchan	12.7
Wester Ross, Strathpeffer and Lochalsh	18.0
WHILDP Plan Area	**15.8**
Highland	11.0
Scotland	7.5
Source: 2011 Census	

9.2 Income

Highland's economic performance and jobs profile is reflected in wages which are lower than the UK and Scotland averages. The Annual Survey of Hours and Earnings (ASHE) shows that in 2012 the average annual wage for all jobs (full and part time) in the UK was £26,052 and in Scotland £25,173 (96.6% of UK). These compare with earnings in Highland of £22,563 (86.6% of UK and 89.6% of Scotland).

One estimate of local incomes available to us is from the CACI Paycheck[7] figures for household income supplied to us by the Scottish Government for house affordability studies and used above. They show in Table 9-4 that in 2013 the average annual household income in the Plan area was £30.2k, lower than both the Highland average of £33.0k and the Scotland average of £34.2k. Income levels are fairly consistent across the Plan area; lowest in Eilean a' Che`o and highest in Fort William and Ardnamurchan.

Table 9-4 Household Income

Ward	% H-H Earning Less than £10k per Year	Average Annual Household Income
Caol and Mallaig	14.8	£29,549
Eilean a' Che`o	14.8	£28,894
Fort William and Ardnamurchan	14.1	£30,842
Wester Ross, Strathpeffer and Lochalsh (whole ward)	14.7	£30,162
WHILDP Plan Area	**14.6**	**£30,176**
Highland	13.4	£33,039
Scotland	13.8	£34,249
Source: Scottish Government / CACI Paycheck		

9.3 Deprivation

Unemployment, benefit uptake and deprivation are reported in detail on the Highland Council website for, individual wards[8] and data zones[9].

The Scottish Index of Multiple Deprivation 2012 (SIMD12) ranks all data zones in Scotland according to their level of multiple deprivation, based on seven domains[10], and provides a useful way of summarising unemployment and benefit dependency. Historic practice was that those data zones in the most deprived 15% in Scotland (ranks 1 to 976 out of 6,505 zones in Scotland) were recognised nationally as deprived and are candidates for regeneration funding. No zones in the Plan area were classed as multiply deprived according to SIMD12 using this measure, although Fort William Plantation was classed as deprived in the 2006 release of the Index.

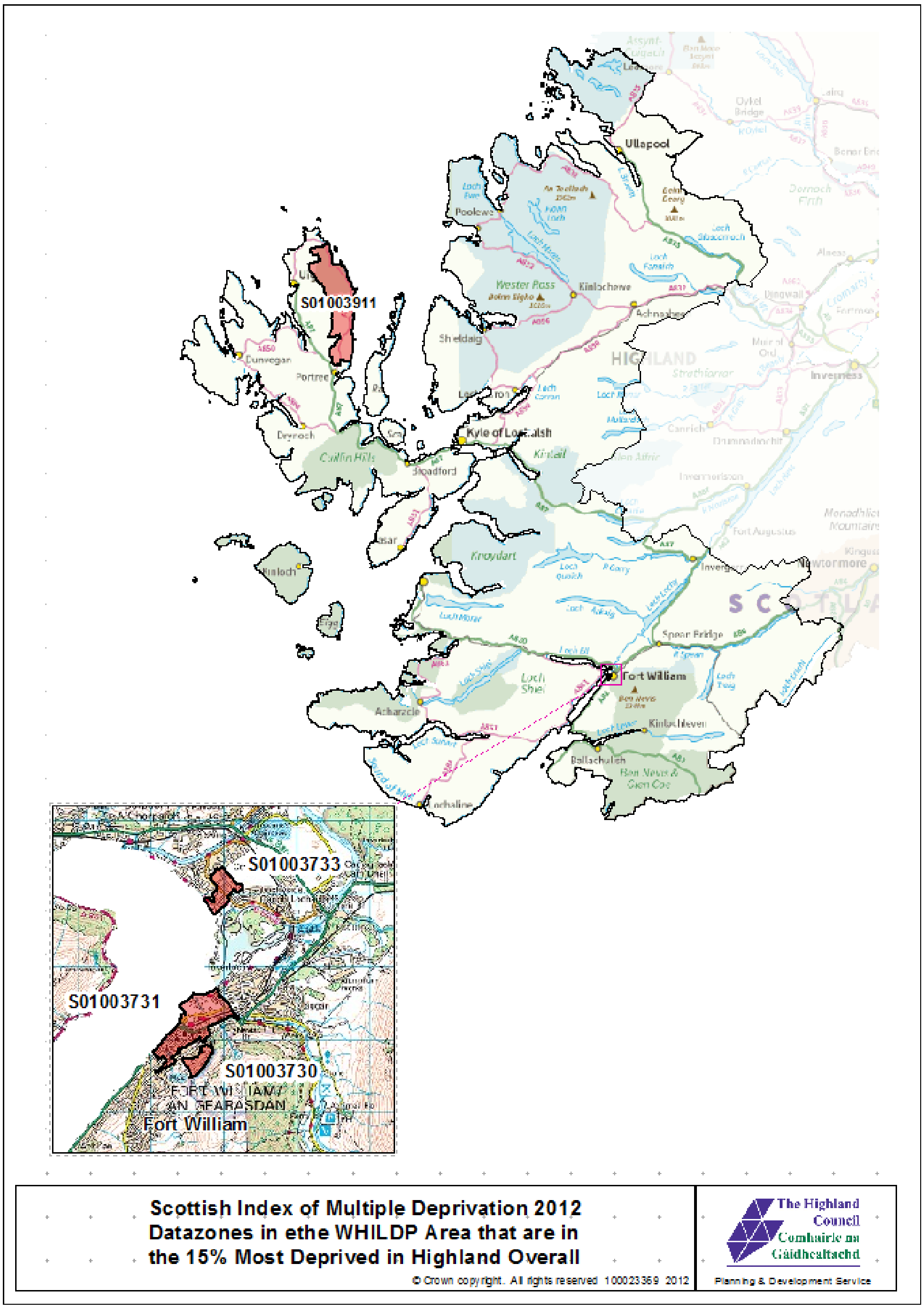
The advent of Single Outcome Agreements has allowed a more flexible approach to targeting regeneration funding and our SOA highlights the 15% most deprived zones in Highland. Map 9 and Table 9-5 below show the four zones in the Plan area that rank in the 15% most deprived in Highland.

[8] http://www.highland.gov.uk/downloads/file/11810/ward_profiles
[9] http://www.highland.gov.uk/downloads/download/732/deprivation_and_fragility
[10] income, employment, health, education, housing, crime, geographic access to services

Table 9-5 Deprived Data Zones

Data Zone	Data Zone Name	Overall SIMD 2012 Rank in Highland	Overall SIMD 2012 Rank in Scotland
S01003730	Fort William Plantation	18	994
S01003731	Fort William Central	35	1,623
S01003733	Caol South East	38	1,735
S01003911	Skye North East	44	1,991

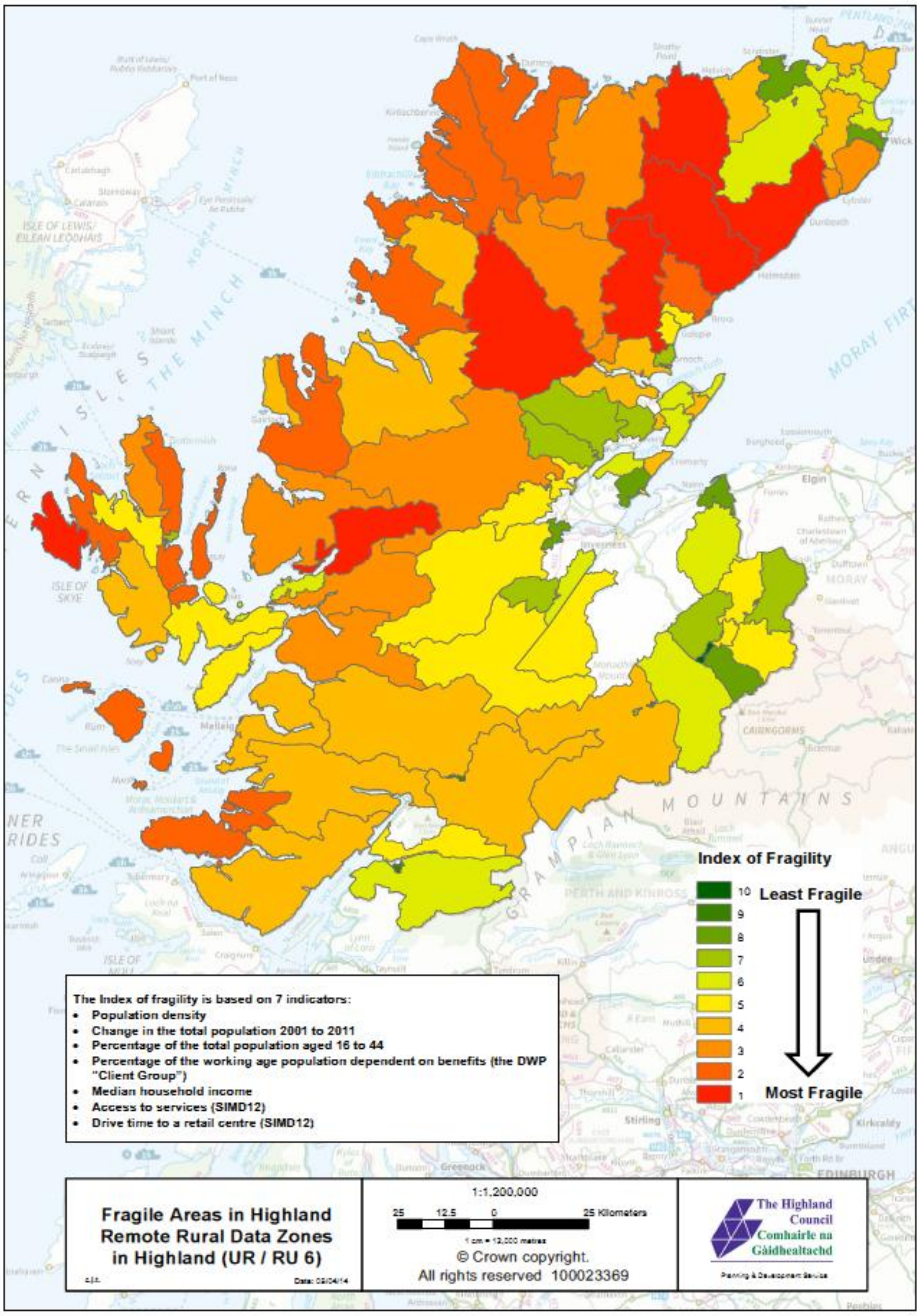
Map 9 Deprived Data Zones



9.4 Fragile Areas

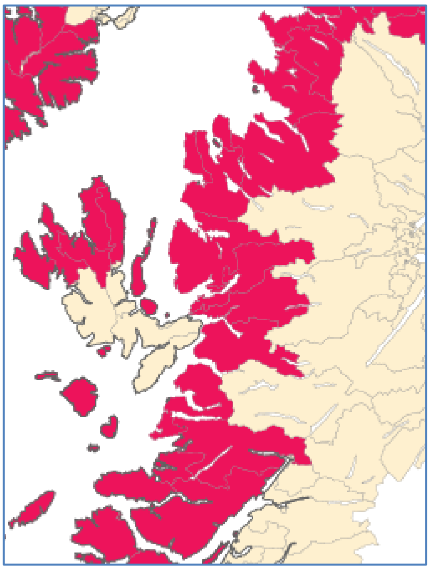
In addition to the deprived areas described above, parts of the Plan area are classed as fragile areas which are areas that may not be economically sustainable due to a combination of declining population, low population density, distance from services and low economic output. Map 10 below presents the results of in-house analysis and shows that outside the urban area of Fort William, the Plan area has some of the most fragile areas in Highland including Strathcarron, Duirinish, Coigach, Aultbea & Laide, parts of north east Skye, Ardnamurchan and the Small Isles (in order of decreasing fragility).

Map 10 Fragile Areas in Highland



In addition, HIE recognises all of the west coast and the northern part of Skye as fragile economic areas which are eligible for targeted funding as shown in red in Map 11 below.

Map 11 Extract from Highland and Islands Enterprise: Priority Areas, 2008



10 INFRASTRUCTURE AND SERVICES

10.1 Travel and Transport

A separate Transport Background Paper is being prepared and will be available on the Council's website.

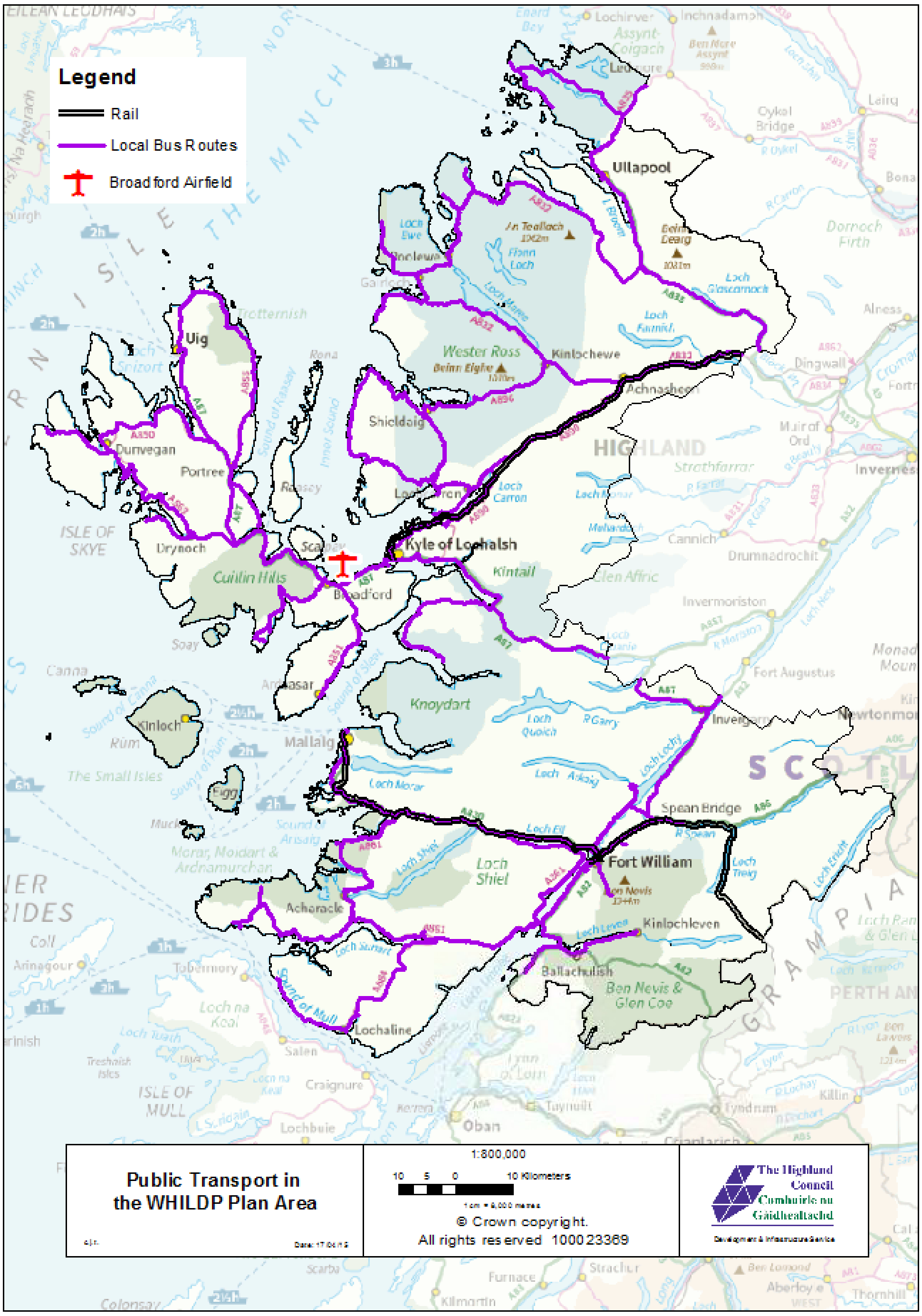
Map 12 below shows the public transport routes – bus and rail – in the Plan Area. Bus routes cover almost all of the strategic routes and significant settlements in the Plan area but this can give a misleading picture in the more rural areas where:

- Some services do not operate every day and have a limited timetable, making travel to work difficult.
- Some routes such as Lochcarron to Applecross are request only and must be booked a day in advance.
- Some routes are linked with school transport, have a limited timetable, and may not run during school holidays.

The timetabled network is supplemented by dial-a-bus services between Portree and Flodigarry and in the Stromeferry area. A community minibus service operates in Lochaber and there are community car schemes in Lochaber, South West Ross and Gairloch.

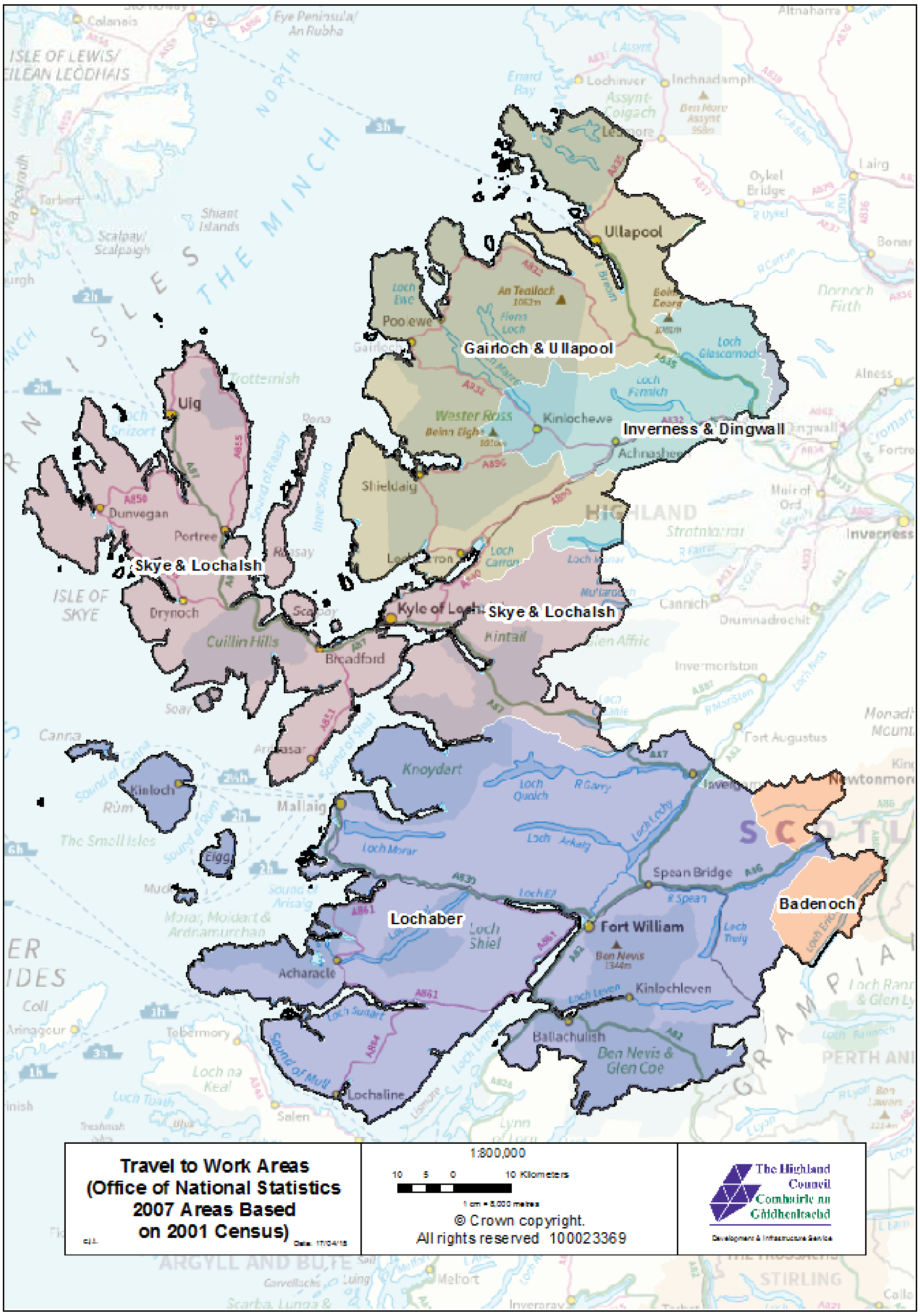
Many of the rural bus routes are financially supported by the Council and funding cut backs have meant that some seasonal tourism related services, such as Poolewe to Inverness, have been withdrawn in recent years. The post bus services to Applecross, Shieldaig and Diabeg were withdrawn in 2009. Broadford Airfield has not been used for commercial flights since 1988 and although there is ongoing interest in reintroducing flights feasibility studies have shown that the short runway and need for specialist aircraft, in combination with limited demand, mean that the viability is uncertain.

Map 12 Public Transport



Because of the limitations of public transport there is heavy reliance on the car for commuting to work and day to day activities. At the time of preparing this Statement, most of the detailed results from the 2011 Census have been published. The Office of National Statistics produces strategic travel to work areas (TTWAs) covering the whole of the UK based on information from the Census and the map below uses the 2001 based areas published in 2007. Map 13 shows that there are three TTWAs entirely within the Plan area, together with part of the Inverness and Dingwall area, and a fragment of the Badenoch area[11].

Map 13 Travel to Work Areas



The distances between settlements in rural areas means that these strategic TTWAs are often made up of a number of smaller sub areas. Analysis of detailed results from the 2001 Census shows that, although a significant majority of jobs in the Fort

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[11] Revised TTWAs have been published since this work was completed. The north part of Skye now has its own Portree TTWA, the southern part of Skye is combined with West Ross from Loch Torridon southwards in the Broadford and Kyle of Lochalsh TTWA, and other boundaries are unchanged.

William settlement zone are filled by people living in area, there is some commuting from adjacent settlements as shown in Table 10-1. These outlying settlements are combined and described as the *Fort William travel area* in subsequent tables. Origin – destination statistics from the 2001 Census were published in a different way making direct comparisons with 2011 difficult but it is likely that there has been a 10% to 20% increase in commuting from Spean Bridge, Roy Bridge, Inverness and Ballachulish and a fall from Kinlochleven and Strontian.

Table 10-1 Home Location of People Working in Fort William, 2011 Census

All People travelling in Fort William	4,891
Fort William	3,595
Spean Bridge	218
Outwith highland	110
Ballachulish	101
Roy Bridge	100
Kinlochleven	87
Inverness	72
Onich	44
Camusnagaul	41
North Ballachulish	38
Glencoe	31
Acharacle	28
Invergarry	28
Ardgour	23
Arisaig	20

Results from the 2011 Census in Table 10-2 below show that, with the exception of in Fort William, car ownership is above both the Highland and Scotland average. It is highest in the Fort William travel area and rest of Lochaber (1.37 and 1.35 vehicles per household respectively). Car ownership is often used as an indicator of affluence but in the Plan area, where incomes are relatively low, it indicates the necessity of car ownership and the expense involved may exacerbate levels of rural poverty.

Table 10-2 Car Ownership by Travel Area, 2001 Census

		Percentage of Households With:			
WHILDP Travel Area	**Average number of cars per household**	**No cars or vans**	**One car or van**	**Two cars or vans**	**Three of more cars or vans**
Fort William	1.06	27	46	21	5
Fort William Travel Area	1.37	15	44	32	9
Rest of Lochaber	1.35	15	47	29	9
Lochalsh	1.29	18	47	27	8
Skye	1.33	16	47	29	8
Small Isles	1.24	13	57	25	4
Wester Ross	1.32	14	50	27	8
WHILDP Area	**1.26**	**19**	**47**	**27**	**7**
Highland	1.23	21	46	26	8
Scotland	1.04	31	42	22	6

Table 10-3 below shows how people travelled to work in 2011. Despite the high levels of car ownership the percentage of people driving to work is below the Highland average in all areas apart from the Fort William travel area. Perhaps surprisingly, the highest percentage of people travelling to work by bus is in Lochalsh (14%) with low levels in the Fort William travel area and Wester Ross.

Table 10-3 also gives a useful insight into levels of home working with 21% of people in the Plan area working or studying from home, compared with 15% for Highland and 11% for Scotland. Levels of home working are highest in the Small Isles (75%), Wester Ross and rural Lochaber (both 26%), and lowest in Fort William (14%).

Table 10-3 Mode of Travel to Work, percentage (total100%), 2011 Census

		Percentage of All People Who Work or Study, Who Travel to Work by:									
WHILDP Travel Area	Percentage who Work or study mainly at or from home	Underground metro light rail or tram	Train	Bus minibus or coach	Taxi or minicab	Driving a car or van	Passenger in a car or van	Motorcycle scooter or moped	Bicycle	On foot	Other
Fort William	14	0	0	12	1	39	12	0	4	18	1
Fort William Travel Area	21	0	1	9	1	45	7	0	2	14	1
Rest of Lochaber	26	0	1	11	0	37	8	0	1	13	2
Lochalsh	23	0	1	14	0	39	8	0	2	11	1
Skye	23	0	0	12	0	42	8	0	1	13	1
Small Isles	75	0	0	3	0	8	2	0	2	7	3
Wester Ross	26	0	1	9	0	36	8	0	2	16	2
WHILDP Area	**21**	**0**	**1**	**11**	**0**	**40**	**9**	**0**	**2**	**15**	**1**
Highland	15	0	1	10	0	43	10	0	2	18	1
Scotland	11	0.3	3	13	1	41	9	0	1	18	1

10.2 Education

The ageing population of the Plan area in combination with the national decline in birth rates since the 1950s, albeit with a slight recovery beginning in the mid 2000s, means that schools across the area are generally operating at less than capacity. Government issued new guidance in the autumn of 2014 on calculating primary school capacities and these will be implemented soon for schools in the Plan area. In overview:

- Of the 62 primaries in the Plan area (and using current calculated capacities), only 5 are operating at more than 80% of capacity, with Spean Bridge at capacity and a extension planned. 39 are operating at less than 60% of capacity (the threshold at which Government normally recommends a review) and two have a roll of less than 10 pupils.
- Six primaries have been closed or mothballed within the last decade: Achaphubuil, Achnasheen, Borrodale, Inverasdale, Torridon, and Uig.
- There are eight secondary schools in the Plan area operating at between 35% (Ardnamurchan High) and 73% (Lochaber High) of capacity.

The Council has begun to roll out its Sustainable School Estates Review in north Skye and Fort William. On Skye, The Council proposes to build a new community school with a Gaelic unit in Dunvegan to replace four current primary schools at Dunvegan, Edinbane, Knockbreck and Struan. These proposals were refused by the School Closures Review Panel, a decision that the Council is now appealing. In Fort William:

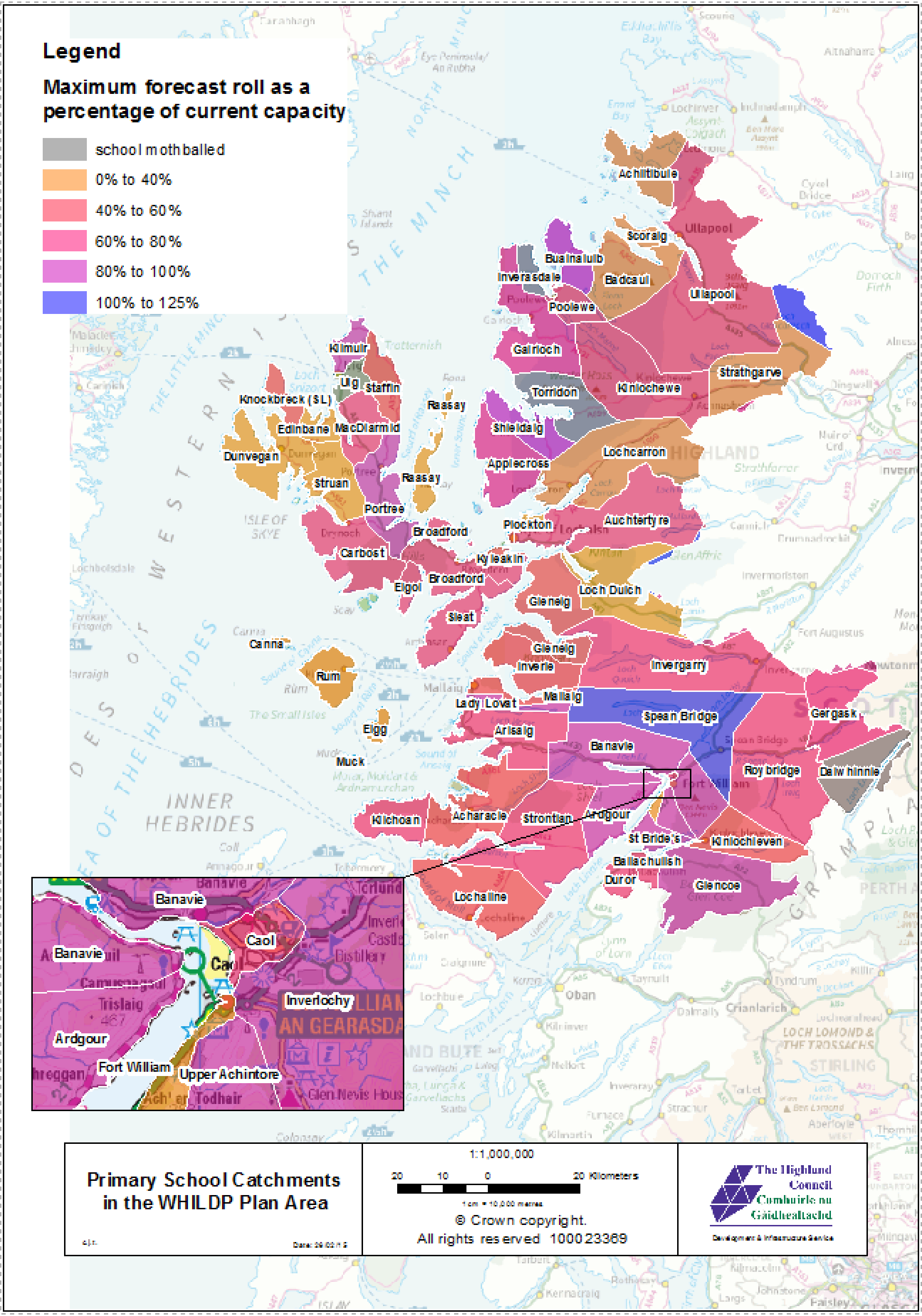
- The new Lundavra primary opened in October 2015 replacing the existing Fort William and Upper Achintore primary schools.

- The new Fort William Gaelic primary school opened in August 2015.
- St Columba's RC primary will replace the existing Fort William RC and Lochyside RC primary schools on the new Caol Joint Campus (which also includes a community centre) which is expected to open in the autumn of 2016.

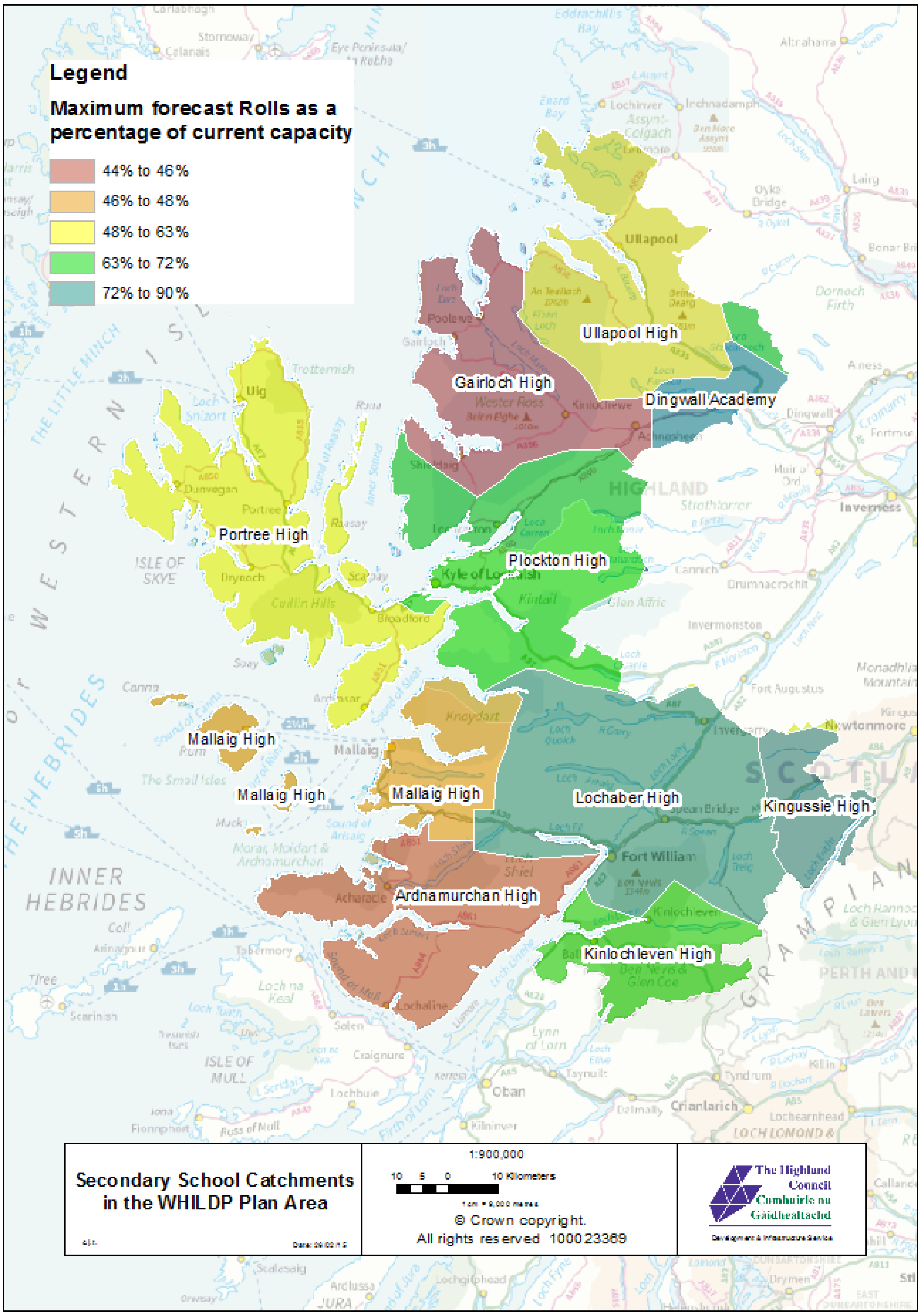
School roll forecasts are an important part of managing education provision and the school estate. Baseline school roll forecasts are available on our website[12] and have been used as the basis for Map 14 and Map 15 below. These are operational forecasts which aim to give the most likely future rolls as an aid to managing our schools and the school estate. They give rolls in each school which are consistent with the rate of population change that we expect to see, and the availability of land for new houses in the area.

[12] http://www.highland.gov.uk/yourcouncil/highlandfactsandfigures/schoolrollforecasts.htm

Map 14 Maximum Forecast Primary School Rolls
(as a percent of current total capacity)



Map 15 Maximum Forecast Secondary School Rolls
(as a percent of current total capacity)

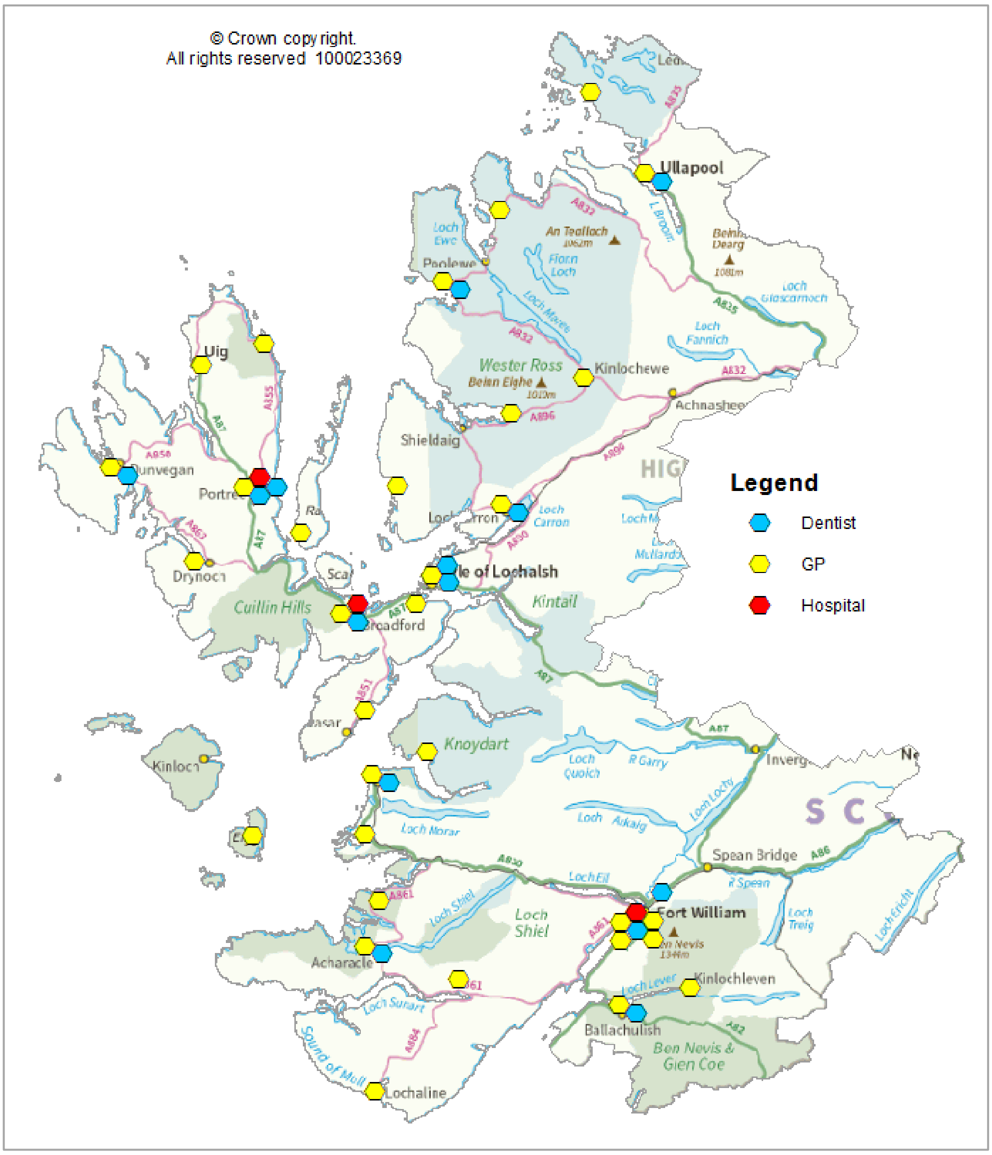


10.3 Health Facilities

Map 16 below shows the locations of dentists, GPs and hospitals in the Plan area: note that in many rural areas the local service is out posted from a larger centre and may have limited opening hours or offer a limited range of services (this comment also applies to some of the other services shown on the following pages).

Fort William is the main service centre in the area, although communication links mean that it serves mainly Lochaber with specialist services to West Ross provided from the Inner Moray Firth area. There are GPs in all of the main settlements but for many remote rural areas a trip to the dentist can involve a considerable journey.

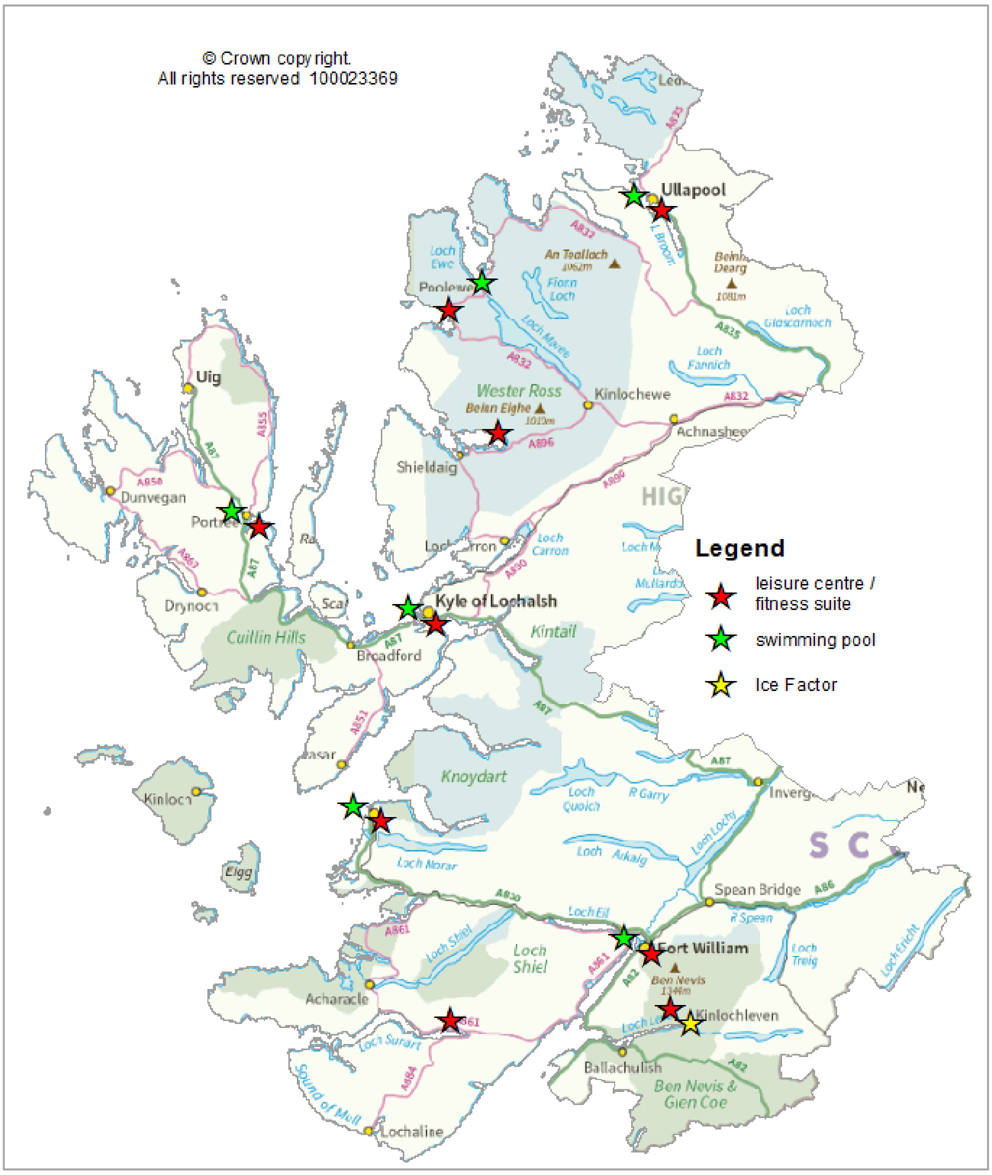
Map 16 Health Facilities



10.4 Leisure

Map 17 below shows the locations of swimming pools and sports centres – defined to include fitness suites - in the area.

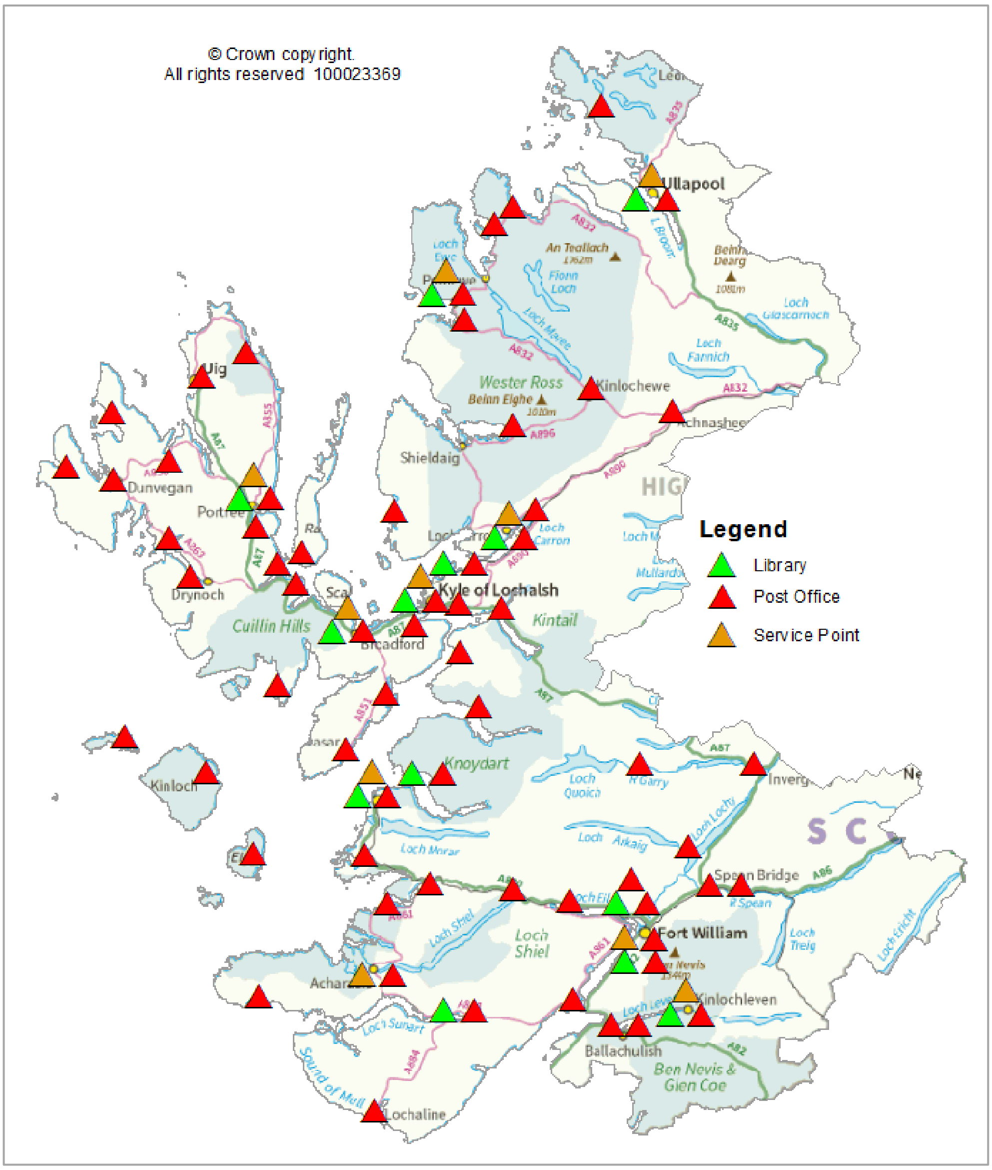
Map 17 Leisure Facilities



10.5 Other Community Services

Map 18 below gives the locations of libraries, post offices and Council Service Points. Community Halls and Centres are operated with differing degrees of formality by many organisations and we do not have single reliable source of information on them.

Map 18 Community Services

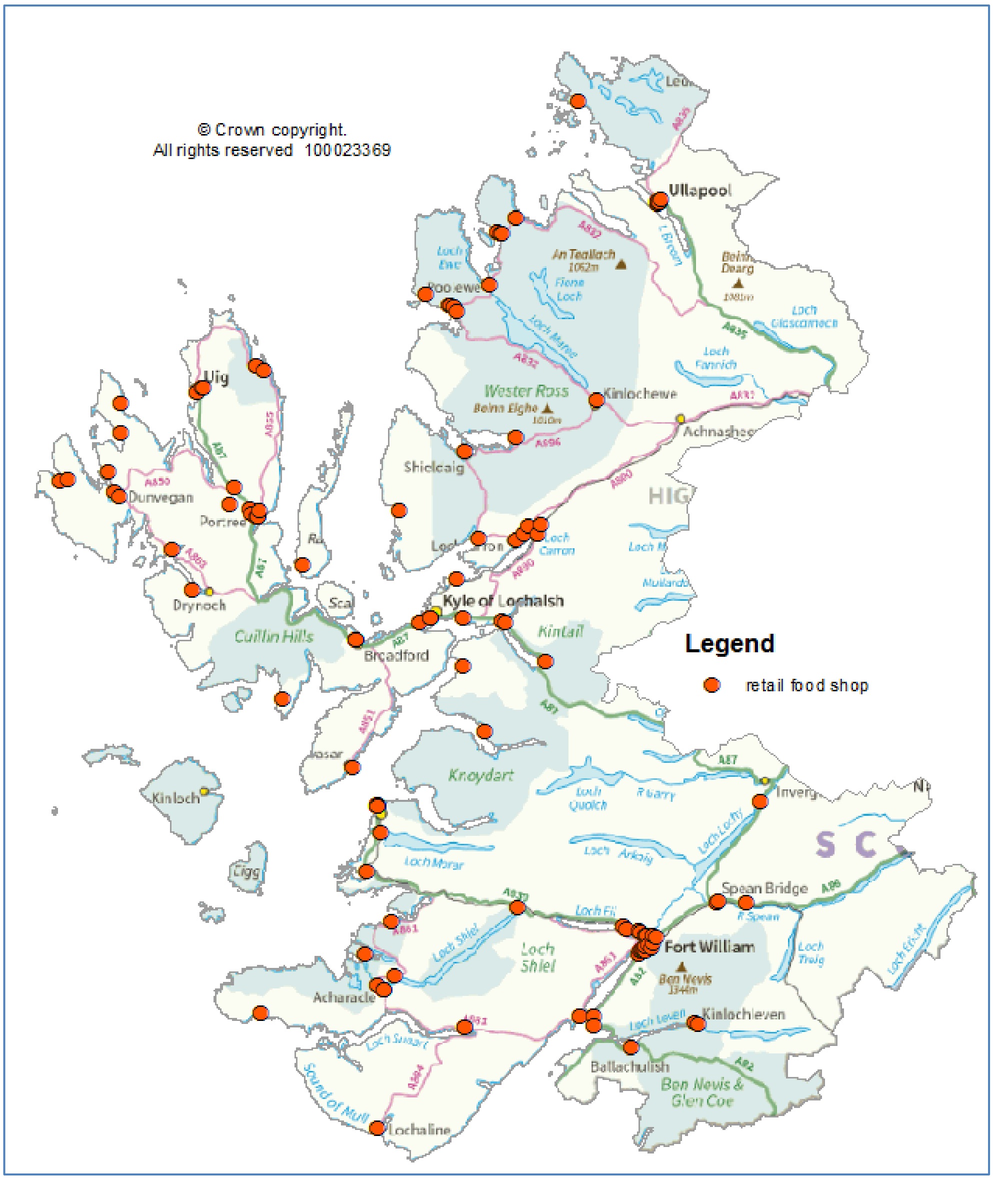


10.6 Retail – Food

The information in the following two sections on retail outlets is taken from information held by the Council's Environmental Health and Trading Standards teams in October 2013. Council inspections are prioritised on a risk basis with the result that the information for food retail and petrol stations is up to date at that time, but the currency is variable for non-food retail.

Map 19 shows food outlets and some judgement has been applied to remove some specialist outlets such as deer larders and farm shops selling or distributing a limited range of produce. It shows that all but the smallest settlements have a shop of some description selling food. Most of these are small independent shops, with larger supermarkets selling food on a national price tariff structure confined to larger towns such as Fort William, Ullapool, Kyle, Portree and Broadford.

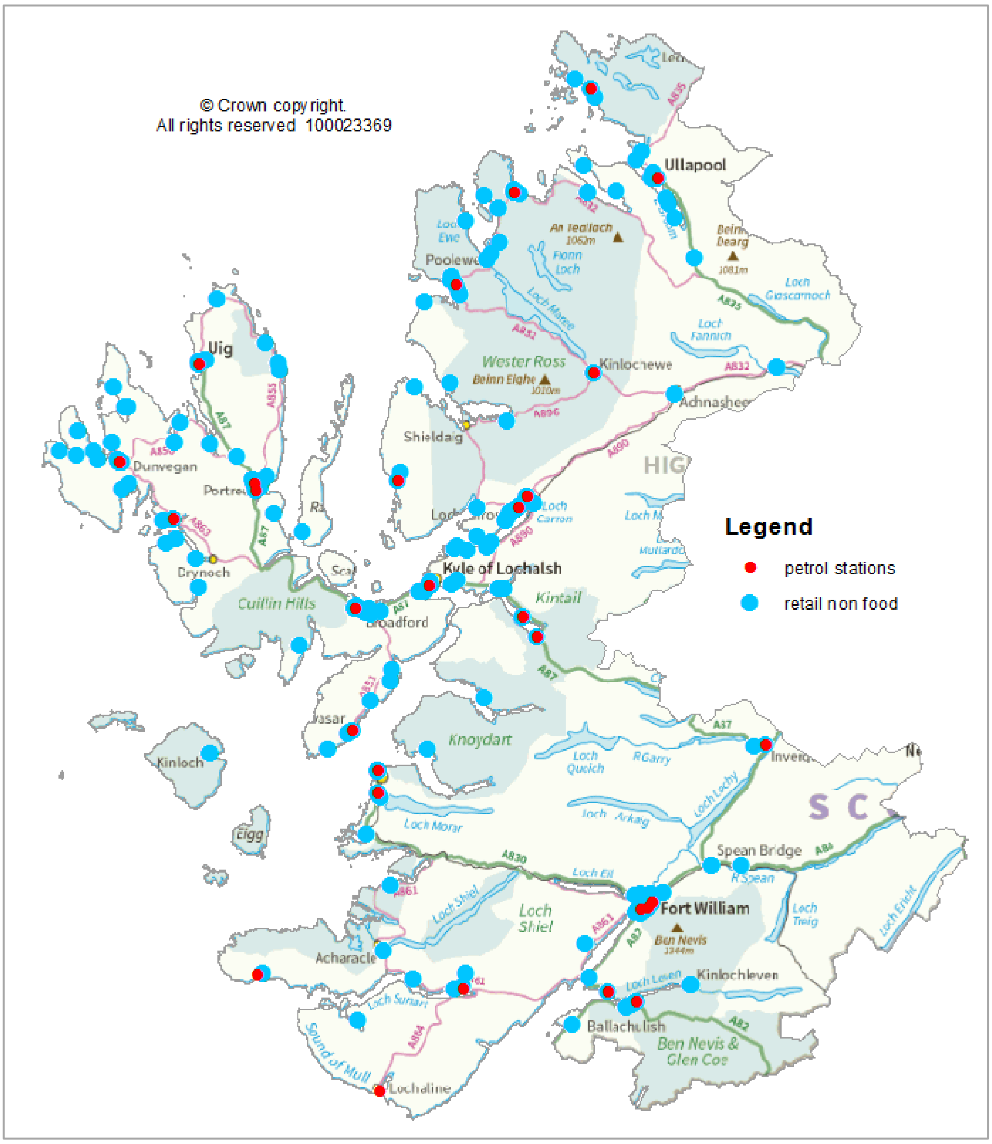
Map 19 Retail Food Outlets



10.7 Non Food Retail and Petrol Stations

Map 20 below showing non food retail outlets and petrol stations confirms that the availability of fuel outside major settlements is limited.

Map 20 Retail (non food) Outlets and Petrol Stations



11 HOUSING NEED AND DEMAND ASSESSMENT

In order to assess the number of new houses that will be required in Highland over the next 10 years and beyond we have carried out a Housing Need and Demand Assessment (HNDA). Our HNDA follows Scottish Government Guidance and has been assessed by the Centre for Housing Market Analysis (CHMA) as robust and credible. Our HNDA is available at:

[Housing Need and Demand Assessment]

This HNDA underpins the West Highland and Islands Local Development Plan and the full document remains the definitive source of information. Extracts for the Plan area are given below for the three separate housing market areas of Lochaber, Skye & Lochalsh and West Ross.

The HNDA presents population and household projections based on the three National Records of Scotland (NRS) 2012 based projections and these have been assessed by the CHMA as robust and credible. The HNDA concludes that the high migration scenario is the NRS scenario that reflects the expected future growth of Highland most closely and provides a baseline for the HWLDP. However, the HNDA also shows that the rate of household growth indicated by the high migration scenario is well below the historic rate of growth we have seen in Highland, and may not be sufficient to sustain continued economic growth. This Statement therefore follows the approach taken in the HNDA and presents two sets of figures:

- Population & household projections and housing supply targets for the high migration scenario which give a baseline and have been used for the "low" scenario in our 2015 HWLDP Main Issues Report. This scenario is the basis for Section 11.3.1 below and has been assessed as robust and credible by the CHMA.
- Housing supply targets based on continued growth, which have been used for the "high" scenario in our HWLDP Main Issues Report. This scenario is the basis for Section 11.3.2 below but has not been assessed by the CHMA against their criteria for robust and credible status as it is policy based and outwith the scope of the Guidance.

The two scenarios effectively give lower and upper limits for the rate of growth we must make provision for in the Plan area.

11.1 Population Projections

The population projections are based on the 2012 series of projections, for the HNDA scenario which is equivalent to 1,100 people moving into Highland each year, similar to the rates of inward migration seen between 2001 and 2009. This equates to around 165 people per year moving into the Plan area (Lochaber 70, Skye & Lochalsh 65, West Ross 30). Table 11-1 below shows that under this scenario the population is expected to increase by 2,028 (4.8%) between 2015 and 2035 with a slightly lower percentage increase in Skye & Lochalsh.

Note that in Table 11-1through to Table 11-4 the figures for West Ross are for the whole HMA, not just the part that lies within the Plan area.

Table 11-1 Projected Populations for Housing Market Areas

Housing Market Area	2015	2020	2025	2030	2035	% change 2015 to 2035
Lochaber	20,067	20,330	20,607	20,859	21,066	5.0
Skye & Lochalsh	12,957	13,101	13,263	13,372	13,376	3.2
West Ross	9,249	9,417	9,595	9,752	9,859	6.6
WHILDP Plan Area	42,273	42,848	43,465	43,983	44,301	4.8
Source: Highland Council 2012 Series Population Projections, high migration scenario						

Table 11-2 and Table 11-3 below show that over the next two decades the relatively modest change in the total population is expected to be accompanied by a significant change in the age structure. There is a fall of around 9% in the number of people aged under 65, with some fluctuation in the narrower age bands as systematic changes such as the ageing of the baby boomer generation born in the late 1940s and 1950s, and the increase in the birth rate that began in the mid 2000s, feed though the age range. The number of people of retirement age is expected to rise significantly with the number of people aged over 75 doubling.

Table 11-2 Projected Population by Age Band 2015 to 2035

	2015	2020	2025	2030	2035	% change 2015 to 2035
00-15	6,984	6,776	6,578	6,635	6,807	-2.5
16-44	12,259	11,999	12,308	12,393	12,277	0.1
45-64	13,471	13,053	12,171	11,084	10,377	-23.0
65-74	5,551	6,233	6,308	6,686	6,746	21.5
75+	4,008	4,787	6,098	7,186	8,094	101.9
All ages	42,272	42,847	43,464	43,984	44,302	4.8
Source: Highland Council 2012 Series Population Projections, high migration scenario						

Table 11-3 Projected Change in Population by Age Band 2015 to 2035 as a percentage of the 2012 population

	2015 to 2020	2015 to 2025	2015 to 2030	2015 to 2035
00-15	-3.0	-5.8	-5.0	-2.5
16-44	-2.1	0.4	1.1	0.1
45-64	-3.1	-9.6	-17.7	-23.0
65-74	12.3	13.6	20.4	21.5
75+	19.4	52.1	79.3	101.9
All ages	1.4	2.8	4.0	4.8
Source: Highland Council 2012 Series Population Projections, high migration scenario				

11.2 Projected Future Household Composition

The average household size has been decreasing for a number of years and is expected to continue to decline in the future as a result of two main factors: first the increasing divorce rate and number of single parent families, and second increased life expectancy which will increase the number of older single and two person families. Results from the 2011 Census confirm these trends although the rate of change is lower than we have seen in the past. These trends would generate a significant requirement for new housing even without the population growth which is expected. Table 11-4 below shows that the number of 3+ person all adult and 2 adults plus children families is expected to decrease, with increases in all other types and the largest increase in one person male and female households (30% and 18% respectively).

The trends point to a possible requirement for smaller houses in the future, but the demand for larger houses may continue as people value generous living space and the opportunities this gives for (eg) having visitors to stay in our increasingly mobile society.

Table 11-4 Estimated 2015 and Projected 2025 & 2035 Households and Household Composition

		2015	2025	2035	% Change 2015 to 2025	% Change 2015 to 2035
1 person	**male**	2,969	3,446	3,866	16.1	30.2
1 person	**female**	3,568	3,969	4,226	11.3	18.4
2 person	**2 adult**	6,875	7,601	7,774	10.5	13.1
2 person	**1 parent**	557	624	713	12.1	28.1
3+ person	**all adult**	1,550	1,420	1,243	-8.4	-19.8
3+ person	**1 parent**	436	480	553	10.3	27.0
3+ person	**2 adults + children**	3,351	3,023	2,973	-9.8	-11.3
	Total	19,305	20,564	21,348	6.5	10.6
Source: Highland Council 2012 based household projections, high migration scenario, using GROS headship rates						

11.3 Future Housing Requirement

This Section shows the expected housing requirement that arises from a combination of population growth and changing household size discussed earlier. Figures are given for five year periods starting in 2015 which will be the start date for our next Local Housing Strategy, which with be harmonised with this Plan. The figures below will be re-based as necessary to align with the publication date of the final Plan.

Figures for the West Ross HMA in Table 11-5 through to Table 11-10 are for the part of the HMA that lies within the Plan area (74% of the whole HMA, see Section 3 above).

11.3.1 Low Scenario

Table 11-5 below shows that 792 houses will be required in the first five years of the Plan, and 771 during the second with 831 during the final ten years. At a local level, even if the overall population falls, additional new houses are likely to be required to meet the demand from a combination of the falling household size and eradicating the backlog of need for affordable housing.

Table 11-5 Housing Requirement (all tenures) – Low Housing Units (no addition for flexibility / market choice)

	2015 to 2019	2020 to 2024	2025 to 2029	2030 to 2034	20 Year Total
Lochaber	361	366	252	175	1,154
Skye & Lochalsh	287	274	147	80	789
West Ross (74% of HMA)	143	131	107	69	450
WHILDP	792	771	506	325	2,393
Source; Highland Housing Need and Demand Assessment 2015, high migration scenario					

The total housing requirement has been allocated to tenure using the *HNDA Tool* supplied by the Centre for Housing Market Analysis. Table 11-6 below shows that the need for social rented housing makes up around 40% of the housing requirement. The figures assume that the current backlog of existing need of 196 in Lochaber, 141 in Skye & Lochalsh and 43 in West Ross is removed during the first 10 years of the Plan period. As a percentage of the total requirement, the need for affordable housing is most acute in West Ross which reflects the current backlog of need and the affordability issues discussed above.

Table 11-6 Need for Social Rented Housing - Low

	Need for Social Rented Housing – Housing Units (no addition for flexibility / market choice)				
	2015 to 2019	**2020 to 2024**	**2025 to 2029**	**2030 to 2034**	**20 Year Total**
Lochaber	172	174	78	59	483
Skye & Lochalsh	131	127	45	27	331
West Ross Ross (74% of HMA)	56	52	33	24	165
WHILDP	358	353	157	111	979
Source; Highland Housing Need and Demand Assessment 2015, high migration scenario					

Table 11-5 above refers to the number of effective occupied homes required, and to estimate the number of homes to be built we need to adjust these figures to take account of ineffective stock in each HMA (12.2% in Lochaber, 19.9% in Skye & Lochalsh and 18.3% in West Ross, mainly second / holiday homes).

The results of this calculation are given in Table 11-7 below and show that in order to deliver the housing requirement as fully effective stock we need to build 2,840 houses over the 20 year period. A further consideration is the additional margin that needs to be added to provide flexibility for changing local circumstances and market choice, which will be given in our Proposed Plan.

Table 11-7 Housing Requirement as Houses to be Built – Low
Taking Ineffective Stock into Account

	2015 to 2019	**2020 to 2024**	**2025 to 2029**	**2030 to 2034**	**20 Year Total**
Lochaber	411	417	287	199	1,314
Skye & Lochalsh	355	339	181	100	975
West Ross Ross (74% of HMA)	175	160	131	84	551
WHILDP	941	916	600	383	2,840
Source; Highland Housing Need and Demand Assessment 2015, high migration scenario					

11.3.2 High Scenario

Table 11-8 to Table 11-10 below are directly comparable with Table 11-5 to Table 11-7 above and show the higher number of new homes (across all tenures) necessary to sustain the rates of development that we have seen in the past. The differences between the two scenarios are significant apart from West Ross (see note below):

- The total requirement to sustain growth is 931 for the five year LHS period and 3,059 for the 20 year HWLDP period, which compares with 792 and 2,393 respectively for the low scenario.
- To sustain growth, the need for social rented housing is 397 for the five year LHS period and 1,182 for the 20 year HWLDP period, which compares with 358 and 979 respectively for the baseline high migration scenario.

Note that these figures do not make any allowance for ineffective stock, and the total requirement as houses to be built is given in Table 11-10.

As noted in 5.4 above, the components of population change are not available for West Ross, and population projections for the HMAs within Ross and Cromarty (for which components are available) use a recognised technique in which the current population share by five year age band is assumed to continue into the future. For West Ross, which has an age profile that is older than both East and Mid Ross, this technique tends to over estimate the growth in the elderly population at higher rates of growth in the total population. In addition, population growth in East and Mid Ross is likely to be driven by the offshore industry at Nigg, Invergordon and Deephaven, as well as general growth across the Inner Moray Firth area centred on Inverness, and both will have a limited impact on West Ross.

In order to avoid the risks of over estimating population growth in West Ross, as well as a future population profile biased towards the older age ranges which would suggest an overly high requirement for smaller houses in the future, the high growth scenario for West Ross is the same as the low scenario. In practice this is likely to result in an under estimate of the future housing requirement as there is some scope for higher growth in the area, but it is difficult to quantify.

Table 11-8 Housing Requirement (all tenures) – High Housing Units (no addition for flexibility / market choice)

	2015 to 2019	2020 to 2024	2025 to 2029	2030 to 2034	20 Year Total
Lochaber	438	459	351	277	1,526
Skye & Lochalsh	350	348	225	161	1,083
West Ross Ross (74% of HMA)	143	131	107	69	450
WHILDP	931	937	683	507	3,059
Source; Highland Housing Need and Demand Assessment 2015, continued growth scenario					

Table 11-9 Need for Social Rented Housing - High

	2015 to 2019	2020 to 2024	2025 to 2029	2030 to 2034	20 Year Total
Lochaber	193	200	109	94	596
Skye & Lochalsh	149	148	69	55	420
West Ross Ross (74% of HMA)	56	52	33	24	165
WHILDP	397	400	211	173	1,182
Source; Highland Housing Need and Demand Assessment 2015, continued growth scenario					

Table 11-10 Housing Requirement as Houses to be Built – High Taking Ineffective Stock into Account

	2015 to 2019	2020 to 2024	2025 to 2029	2030 to 2034	20 Year Total
Lochaber	499	523	400	315	1,738
Skye & Lochalsh	432	430	278	199	1,339
West Ross Ross (74% of HMA)	176	160	131	85	551
WHILDP	1,107	1,112	809	599	3,627
Source; Highland Housing Need and Demand Assessment 2015, continued growth scenario					

12 HOUSING LAND AUDIT

The Council has published a 2014 based Housing Land Audit. Table 12-1 below is based on this audit and shows that we have remaining capacity on currently allocated sites in the Plan area to deliver 3,377 houses. In addition to this, analysis of previous house completions has shown that as significant proportion of completions within the Plan area tend to be on windfall sites. If windfall completions continue at historic rates it is likely that 103 houses per year will be windfall (see above), and assuming that this rate continues through a 20 year period, the total capacity of sites in the Plan area is as shown in the table below.

Only 499 out of the 3,377 allocated sites have current extant planning permission. On larger sites in particular, a combination of infrastructure constraints, challenging ground conditions, and difficulties in raising finance in advance of work starting mean that sites are not coming forward for development as quickly as we would like.

Table 12-1 Housing Land Audit Sites

HMA	Number of Allocated Sites	Capacity of Current Allocated Sites (1)	Estimated Number of Windfall Completions per Year (2)	Total 20 Year Capacity [20*(2)+(1)]	20 Year Housing Requirement as Effective Houses (see above)	Number of Units with Current Planning Permission
Lochaber	79	2,223	70	3,023	1,314	269
Skye & Lochalsh	31	275	75	915	975	59
West Ross	62	879	33	1,479	744	171
WHILDP	172	3,377	178	5,437	3,033	499
Source: Highland Council 2014 Housing Land Audit						

13 BUSINESS AND INDUSTRIAL LAND AUDIT

The Council monitors business and industrial land allocated in local development plans, relevant planning applications, and on-site development but has not published a formal audit. Table 13-1 below shows the sites that are allocated in the existing West Ross and WHILDP Plans.

Table 13-1 Business Land Audit Sites

	Business		Industry		Business and Industry		Mixed Use		All Sites	
Settlement Zone	**No of Sites**	**Area HA**	**No of Sites**	**Area HA**	**No of Sites**	**Area HA**	**No of Sites**	**Area HA**	**No of Sites**	**Area HA**
Acharacle	1	0.8		0.0		0.0	3	5.9	4	6.7
Achmore	1	0.1		0.0		0.0	1	1.5	2	1.6
Achnacarry	1	0.1		0.0		0.0		0.0	1	0.1
Achnasheen	2	0.3		0.0		0.0		0.0	2	0.3
Ardgour	2	0.6		0.0		0.0	1	0.6	3	1.1
Arisaig	2	0.9		0.0		0.0		0.0	2	0.9
Aultbea	1	0.5		0.0		0.0		0.0	1	0.5
Ballachulish		0.0		0.0		0.0	1	1.3	1	1.3
Balmacara	1	6.0		0.0		0.0		0.0	1	6.0
Broadford		0.0	1	22.1		0.0	5	263.3	6	285.4
Carbost		0.0		0.0		0.0	2	4.5	2	4.5
Dornie		0.0	2	1.3		0.0		0.0	2	1.3
Dunvegan		0.0		0.0		0.0	5	22.5	5	22.5
Edinbane		0.0		0.0		0.0	1	0.4	1	0.4
Fort William	6	66.1		0.0	1	18.3	9	97.0	16	181.4
Gairloch	4	10.5		0.0		0.0		0.0	4	10.5
Glencoe	2	171.5		0.0		0.0		0.0	2	171.5
Glenelg	1	1.4		0.0		0.0		0.0	1	1.4
Invergarry	1	0.1		0.0		0.0	1	1.6	2	1.8
Kinlochleven		0.0		0.0		0.0	2	7.1	2	7.1
Kyle	1	0.4		0.0		0.0		0.0	1	0.4
Kyleakin	2	0.2	1	75.0		0.0	1	0.1	4	75.3
Lochaline	2	0.6		0.0		0.0		0.0	2	0.6
Lochcarron	1	2.3	1	62.9		0.0		0.0	2	65.2
Mallaig	2	0.9		0.0		0.0		0.0	2	0.9
North Ballachulisl	1	0.6		0.0		0.0		0.0	1	0.6
Onich		0.0		0.0		0.0	1	3.4	1	3.4
Poolewe	1	2.4		0.0		0.0		0.0	1	2.4
Portree	3	4.3	1	19.7		0.0	4	9.2	8	33.3
Raasay	1	0.2		0.0		0.0	2	1.2	3	1.4
Sleat		0.0		0.0		0.0	3	8.6	3	8.6
Spean Bridge	1	0.1		0.0		0.0	1	1.0	2	1.2
Strontian	1	0.9		0.0		0.0		0.0	1	0.9
Uig		0.0		0.0		0.0	2	1.9	2	1.9
Ullapool	3	9.1		0.0	1	30.3		0.0	4	39.4
Grand Total	**44**	**281.0**	**6**	**181.1**	**2**	**48.6**	**45**	**431.2**	**97**	**941.9**

Notable areas allocated for business and industrial use include:

- Broadford air strip and the large woodland area at Cnoc na Cachaille west of Broadford village, both allocated for mixed use including business use.
- Glencoe Ski Resort, allocated for business use.
- The sand and gravel quarries west of Kyleakin, allocated for industrial use.
- The Kishorn dry dock and base, identified in NPF3 as a National Renewables Infrastructure Plan site for redevelopment as a manufacturing base to support offshore renewable energy, with potential to support up to 2,500 new jobs.

APPENDIX

Table 1 – Housing: Tenure and Housing Stock % by Settlement Zone

The figures below are taken from the 2011 Census results and are given for all of the settlement zones that lie wholly within the WHILDP area. They do not sum up to the figures given in the main body of the text as the summary in the main report covers the entire area (including settlement zone fragments excluded from this table).

Settlement Zone	All occupied household spaces (100%)	Owned	Rented: Council (Local authority)	Rented: Other social rented	Rented: Private landlord or letting agency	Living rent free	Other		All household spaces (100%)	Unoccupied household spaces: Second residence/holiday accommodation	Unoccupied household spaces: Vacant
Acharacle	281	65.9	4.2	8.8	14.9	5.5	0.7		380	24.4	2.1
Achiltibuie	125	76.4	11.6	1.0	2.9	5.3	2.8		173	26.2	2.2
Achmore	64	87.5	3.1	1.6	3.1	0.0	4.7		78	14.1	4.5
Achnacarry	35	70.7	0.1	0.9	19.3	3.2	5.9		57	32.7	7.2
Achnasheen	19	61.9	7.9	6.3	11.1	9.5	3.2		27	27.3	1.6
Applecross	93	74.4	8.6	3.2	10.1	2.1	1.5		140	33.1	0.4
Ardgour	88	57.7	6.9	17.1	9.1	6.9	2.3		107	15.1	4.5
Arisaig	198	62.0	9.2	17.2	7.5	3.1	1.0		251	16.5	7.0
Aultbea	303	77.1	6.3	5.0	5.4	4.3	1.9		380	16.8	4.6
Ballachulish	477	67.5	13.2	4.2	9.6	3.1	2.5		561	13.6	2.0
Balmacara	136	78.4	3.7	7.7	6.9	2.5	0.8		175	20.8	1.8
Broadford	618	64.4	10.9	12.1	9.3	2.2	1.0		720	12.6	2.5
Camusnagaul	69	90.0	2.9	2.9	1.4	1.4	1.4		82	13.3	2.7
Carbost	131	79.6	5.4	4.3	5.0	2.9	2.8		184	25.1	4.3
Dornie	116	76.1	13.0	2.6	5.0	1.5	1.8		160	24.8	3.6
Dundonnell	85	77.4	2.3	1.2	10.0	6.2	2.9		100	14.3	1.1
Dunvegan	177	61.9	14.2	8.3	8.2	5.7	1.8		216	14.6	5.3
Edinbane	141	79.4	2.8	6.4	5.7	3.5	2.1		174	18.4	0.7
Elgol	66	83.0	1.0	0.0	8.7	1.8	5.5		84	17.0	4.3
Flodigarry	111	81.8	0.6	3.7	7.6	4.6	1.8		137	16.6	2.3
Fort William	4,654	59.6	17.9	11.3	7.0	2.1	2.1		4,933	4.5	1.9
Gairloch	490	77.4	10.1	2.5	5.2	3.2	1.7		660	22.8	3.7

Garve	137	63.0	6.7	0.0	18.5	10.2	1.6		151	4.0	8.1
Geary	121	86.8	2.5	2.5	7.4	0.8	0.0		168	26.8	1.3
Glenborrodale	47	79.9	2.0	0.3	10.2	3.6	3.9		88	46.2	0.2
Glencoe	144	73.9	9.8	0.7	5.7	7.8	2.1		196	25.0	2.0
Glendale	163	90.2	1.2	0.0	6.7	0.6	1.2		248	31.5	3.1
Glenelg	119	69.6	3.4	11.0	11.4	2.7	1.9		187	33.9	2.8
Glenfinnan	51	58.2	3.0	13.4	7.5	13.4	4.5		64	17.9	3.7
Inverasdale	89	84.3	1.1	4.5	7.9	1.1	1.1		105	8.6	8.3
Invergarry	167	70.7	7.8	3.6	9.6	6.0	2.4		216	19.9	3.7
Inverinate	148	79.5	4.0	0.7	7.2	7.3	1.3		207	26.9	1.7
Kensaleyre	99	92.3	1.5	1.0	3.1	1.0	1.0		105	5.2	1.0
Kilchoan	96	71.2	8.8	8.4	7.6	0.8	3.3		154	35.7	2.4
Killilan	46	70.2	2.1	2.1	6.4	14.9	4.3		66	30.9	0.0
Kilvaxter	110	77.8	2.2	8.9	7.7	3.4	0.0		143	20.6	3.5
Kingairloch	10	26.1	0.0	4.3	30.4	26.1	13.0		20	42.2	12.0
Kinlochewe	44	61.9	7.9	6.3	11.1	9.5	3.2		61	27.3	1.6
Kinlochleven	462	51.8	31.9	6.3	5.9	2.3	1.8		493	3.8	4.7
Knoydart	73	63.3	0.0	5.3	17.0	7.8	6.5		108	29.3	3.7
Kyle	377	55.8	16.5	16.4	5.4	3.5	2.4		420	9.1	2.0
Kyleakin	162	64.9	14.2	8.1	9.5	2.7	0.4		195	15.2	3.0
Lochaline	154	60.8	14.2	4.7	8.6	7.7	3.9		222	22.6	11.8
Lochcarron	435	73.6	6.7	3.9	9.9	3.7	2.3		556	20.1	2.1
Mallaig	368	62.6	13.4	8.9	10.6	2.3	2.3		387	3.0	3.1
Morar	112	82.3	1.3	6.1	6.0	2.8	1.6		137	14.6	3.8
North Ballachulish	129	77.7	4.5	5.4	7.2	3.1	2.2		147	11.4	1.6
Onich	100	77.2	2.9	3.8	8.4	4.8	3.0		116	12.4	1.1
Plockton	207	69.8	10.5	7.9	6.6	4.3	0.9		272	22.3	1.9
Poolewe	116	56.9	9.3	12.1	9.5	11.5	0.7		133	9.4	6.7
Portnalong	98	83.8	1.9	6.4	2.3	2.2	3.4		120	15.1	3.4
Portree	1,244	58.1	13.1	19.9	5.9	1.6	1.5		1,397	8.6	3.8
Raasay	78	80.8	3.8	5.1	2.6	2.6	5.1		138	42.8	0.8
Roy Bridge	239	76.6	7.4	4.2	4.8	3.9	3.1		276	13.2	0.1
Scoraig	35	66.0	0.0	0.0	15.1	16.8	2.1		49	26.9	4.0
Shieldaig	90	70.1	7.9	13.7	6.4	1.3	0.7		136	31.2	3.4

Skeabost Bridge	255	80.6	1.5	3.9	8.9	2.3	2.7		298	14.3	0.0
Sleat	384	71.0	4.7	9.1	9.3	2.5	3.5		511	24.5	0.3
Small Isles	67	46.3	3.0	6.0	26.9	4.5	13.4		101	21.8	22.6
Spean Bridge	354	71.8	8.2	6.4	9.6	2.0	2.0		398	9.5	2.1
Staffin	159	74.6	6.3	8.9	6.0	1.6	2.5		209	21.0	4.0
Strontian	208	67.1	10.2	6.6	7.9	6.2	2.0		274	19.6	6.2
Struan	94	86.9	0.8	4.2	5.5	2.6	0.0		122	19.8	3.9
Torridon	95	75.2	4.1	8.2	6.2	4.1	2.1		137	28.8	2.7
Uig	179	76.9	13.1	3.3	3.9	2.2	0.6		200	9.3	1.3
Ullapool	853	65.0	11.2	7.6	10.0	4.0	2.3		1,001	12.0	4.2
Vatten	143	83.7	1.5	1.7	7.9	2.5	2.7		173	13.3	4.5

Table 2 – Location of New House Completions, by Settlement Zone, 2000 to 2014

(this table excludes 2 houses that are outwith settlement zone boundaries)

Settlement Zone	All Completions	Completions on Allocated Sites	Completions not on Allocated Sites (Windfall)	Completions not on Allocated Sites but within SDA	Completions not on Allocated Sites, not in SDA, in Hinterland Area
Acharacle	60	18	42	4	0
Achiltibuie	26	0	26	16	0
Achmore	9	5	4	0	0
Achnacarry	27	5	22	1	8
Achnasheen	0	0	0	0	0
Applecross	26	0	26	16	0
Ardgour	15	10	5	1	0
Arisaig	41	22	19	6	0
Aultbea	44	2	42	36	0
Ballachulish	75	38	37	16	0
Balmacara	39	31	8	5	0
Broadford	140	121	19	7	0
Camusnagaul	13	0	13	1	0
Carbost	47	19	28	12	0
Dalwhinnie (part)	0	0	0	0	0
Dornie	41	36	5	1	0
Dundonnell	13	0	13	7	0
Dunvegan	32	24	8	2	0
Edinbane	50	16	34	19	0
Elgol	18	14	4	1	0
Flodigarry	33	25	8	1	0
Fort William	416	300	116	82	30
Gairloch	113	21	92	83	0
Garve	3	0	3	0	0
Geary	37	26	11	8	0
Glenborrodale	16	0	16	1	0
Glencoe	24	9	15	9	0

Glendale	59	21	38	28	0
Glenelg	36	15	21	0	0
Glenfinnan	22	18	4	4	0
Inverasdale	23	0	23	19	0
Invergarry	38	15	23	0	0
Inverinate	28	16	12	3	0
Kensaleyre	35	12	23	10	0
Kilchoan	21	6	15	3	0
Killilan	17	11	6	0	0
Kilvaxter	34	30	4	1	0
Kingairloch	2	0	2	0	0
Kinlochewe	12	0	12	11	0
Kinlochlaggan (part)	6	0	6	0	0
Kinlochleven	18	8	10	10	0
Knoydart	15	4	11	1	0
Kyle	23	14	9	9	0
Kyleakin	28	22	6	6	0
Laggan (part)	0	0	0	0	0
Lochaline	23	2	21	0	0
Lochcarron	64	0	64	47	0
Mallaig	33	32	1	1	0
Morar	52	9	43	7	0
North Ballachulish	21	10	11	1	0
Onich	26	13	13	9	3
Plockton	46	33	13	4	0
Poolewe	23	13	10	10	0
Portnalong	34	27	7	5	0
Portree	328	282	46	39	0
Raasay	12	9	3	0	0
Roy Bridge	66	10	56	7	0
Scoraig	3	0	3	3	0
Shieldaig	29	0	29	20	0
Skeabost Bridge	64	29	35	16	0
Sleat	127	85	42	22	0

Small Isles	10	0	10	0	0
Spean Bridge	105	55	50	21	8
Staffin	34	26	8	2	0
Strontian	66	5	61	29	0
Struan	19	8	11	6	0
Torridon	25	0	25	21	0
Uig	44	35	9	4	0
Ullapool	154	36	118	96	0
Vatten	35	6	29	18	0
All Completions	3,218	1,659	1,559	828	49

Table 3 – Origins of House Buyers in the Plan Area % 2009 to 2013, by Settlement Zone (open market sales)

		Origin of Buyer as % of All Sales in Settlement Zone															
Settlement Zone of House	**Housing Market Area of House**	**Rest of Scotland**	**Rest of UK**	**Overseas**	**Badenoch and Strathspey**	**Caithness**	**East Ross**	**Inverness**	**Lochaber**	**Mid Ross**	**Nairn**	**Skye and Lochalsh**	**Sutherland**	**West Ross**	**Unknown**	**All Sales in Settlement Zone (100%)**	**Buyers Already Living in Highland**
Acharacle	Lochaber	16	23	3	0	0	0	3	42	0	0	0	0	0	13	31	45
Ardgour	Lochaber	17	17	0	0	0	0	0	50	0	0	0	0	0	17	6	50
Arisaig	Lochaber	32	32	5	0	0	0	0	21	0	0	0	0	0	11	19	21
Ballachulish	Lochaber	22	22	5	0	0	0	0	39	0	0	5	0	0	7	41	44
Camusnagaul	Lochaber	0	0	0	0	0	0	25	75	0	0	0	0	0	0	4	100
Fort William	Lochaber	10	6	0	0	0	0	3	73	0	0	0	0	0	6	430	77
Glenborrodale	Lochaber	13	38	0	0	0	0	0	25	0	0	0	0	0	25	8	25
Glencoe	Lochaber	19	19	0	0	0	0	0	45	0	0	0	0	3	13	31	48
Glenfinnan	Lochaber	44	11	0	0	0	0	0	33	0	0	0	0	0	11	9	33
Invergarry	Lochaber	15	24	3	0	0	0	9	38	0	0	0	0	3	9	34	50
Kilchoan	Lochaber	13	27	0	0	0	0	0	33	0	0	0	0	0	27	15	33
Kinlochleven	Lochaber	19	16	3	0	0	0	0	62	0	0	0	0	0	0	37	62
Knoydart	Lochaber	14	43	0	0	0	0	0	29	0	0	0	0	0	14	7	29
Lochaline	Lochaber	50	13	0	0	0	0	0	25	0	0	0	0	0	13	8	25
Mallaig	Lochaber	8	0	0	4	0	0	0	83	0	0	0	0	0	4	24	88
Morar	Lochaber	9	18	0	0	0	0	0	73	0	0	0	0	0	0	11	73
North Ballachulish	Lochaber	30	50	0	0	0	0	0	20	0	0	0	0	0	0	10	20
Onich	Lochaber	21	29	0	0	0	0	0	50	0	0	0	0	0	0	14	50

Roy Bridge	Lochaber	17	20	3	0	0	0	3	50	0	0	3	0	0	3	30	57
Small Isles	Lochaber	17	17	0	0	0	0	0	50	0	0	0	0	0	17	6	50
Spean Bridge	Lochaber	23	15	3	3	0	0	5	38	0	0	3	0	0	10	39	49
Strontian	Lochaber	34	9	0	0	0	0	0	44	0	0	0	0	0	13	32	44
Achmore	Skye & Lochalsh	25	25	0	0	0	0	13	0	0	0	25	0	0	13	8	38
Balmacara	Skye & Lochalsh	43	21	0	0	0	0	0	0	0	0	29	0	0	7	14	29
Broadford	Skye & Lochalsh	16	25	1	1	0	0	0	0	0	0	46	0	1	9	87	48
Carbost	Skye & Lochalsh	9	61	4	0	0	0	0	4	0	0	9	0	0	13	23	13
Dornie	Skye & Lochalsh	58	17	0	0	0	0	0	0	0	0	25	0	0	0	12	25
Dunvegan	Skye & Lochalsh	26	21	5	0	0	0	0	5	0	0	21	0	0	21	19	26
Edinbane	Skye & Lochalsh	27	36	5	0	0	0	9	0	0	0	18	0	0	5	22	27
Elgol	Skye & Lochalsh	33	17	0	0	0	0	0	0	0	0	17	0	0	33	6	17
Flodigarry	Skye & Lochalsh	8	42	0	0	0	0	0	8	0	0	25	0	0	17	12	33
Geary	Skye & Lochalsh	30	39	0	0	0	0	0	4	0	0	4	0	0	22	23	9
Glendale	Skye & Lochalsh	27	35	0	4	0	0	4	0	0	0	15	0	0	15	26	23
Glenelg	Skye & Lochalsh	22	0	33	0	0	0	0	0	0	0	33	0	0	11	9	33
Inverinate	Skye & Lochalsh	33	17	0	0	0	0	6	0	0	0	22	0	0	22	18	28
Kensaleyre	Skye & Lochalsh	6	25	0	0	0	0	0	0	0	0	69	0	0	0	16	69
Killilan	Skye & Lochalsh	23	27	0	0	0	0	5	0	0	0	27	0	0	18	22	32
Kilvaxter	Skye & Lochalsh	17	50	0	0	0	0	0	0	0	0	17	0	0	17	12	17
Kyle	Skye & Lochalsh	18	14	0	4	0	0	0	0	0	0	64	0	0	0	28	68
Kyleakin	Skye & Lochalsh	13	20	0	0	0	0	0	0	0	0	33	0	0	33	15	33
Plockton	Skye & Lochalsh	18	23	0	0	0	0	0	0	0	0	23	0	0	36	22	23
Portnalong	Skye & Lochalsh	11	33	0	0	0	0	0	0	0	0	33	0	0	22	9	33
Portree	Skye & Lochalsh	16	8	1	0	0	1	3	0	0	1	62	0	0	8	153	66
Raasay	Skye & Lochalsh	15	38	0	0	0	8	0	0	0	8	8	0	0	23	13	23
Skeabost Bridge	Skye & Lochalsh	26	26	0	0	0	0	0	3	0	0	34	0	0	11	35	37
Sleat	Skye & Lochalsh	19	34	3	0	0	0	2	0	2	0	20	0	0	20	59	24
Staffin	Skye & Lochalsh	21	25	4	0	0	0	0	0	0	0	29	0	0	21	24	29
Struan	Skye & Lochalsh	27	13	0	0	7	0	0	0	0	0	27	0	0	27	15	33
Uig	Skye & Lochalsh	21	26	0	0	0	0	0	0	5	0	37	0	0	11	19	42
Vatten	Skye & Lochalsh	8	46	8	0	0	0	0	0	8	0	15	0	0	15	13	23
Achiltibuie	West Ross	11	22	0	0	0	0	0	0	0	0	0	0	33	33	9	33
Achnasheen	West Ross	0	0	0	0	0	0	0	0	0	0	0	0	100	0	1	100

Applecross	West Ross	0	75	0	0	0	0	0	0	0	0	0	0	0	25	4	0
Aultbea	West Ross	26	35	0	0	0	0	0	0	4	0	0	0	22	13	23	26
Dundonnell	West Ross	20	20	0	0	0	0	0	0	0	10	0	0	30	20	10	40
Gairloch	West Ross	31	21	1	1	0	1	3	0	3	0	0	0	27	11	71	35
Garve	West Ross	14	21	0	0	0	0	7	0	0	0	7	0	29	21	14	43
Inverasdale	West Ross	100	0	0	0	0	0	0	0	0	0	0	0	0	0	2	0
Kinlochewe	West Ross	33	33	0	0	0	0	0	0	0	0	0	0	33	0	3	33
Lochcarron	West Ross	17	23	0	0	0	0	3	0	0	0	6	0	31	20	35	40
Poolewe	West Ross	20	20	0	0	0	0	20	0	0	0	0	0	40	0	5	60
Shieldaig	West Ross	33	28	0	0	0	0	6	0	0	0	0	0	17	17	18	22
Scoraig	West Ross	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Strathconon	West Ross	33	11	11	0	0	0	11	0	22	0	0	0	11	0	9	44
Torridon	West Ross	29	18	0	0	0	0	0	0	0	0	0	0	12	41	17	12
Ullapool	West Ross	17	6	0	1	1	0	1	0	2	0	0	3	58	10	93	67
WHILDP Total		**19**	**18**	**1**	**0**	**0**	**0**	**2**	**27**	**1**	**0**	**14**	**0**	**6**	**11**	**1,894**	**51**

The Highland Council
Comhairle na Gàidhealtachd