

**Inner Moray Firth  
Proposed Local Development Plan**



# Monitoring Statement

**November 2013**



**An Samhain 2013**

## Aithris Sgrùdaidh

**Linne Mhoireibh A-staigh  
Plana Leasachadh Ionadail air a Mholadh airson**

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## **INNER MORAY FIRTH LOCAL DEVELOPMENT PLAN: MONITORING STATEMENT: HEADLINES**

The first formal draft of the Plan, the *Main Issues Report* must be accompanied, and its content informed by a Monitoring Statement, which assesses changes in the characteristics of an area and the success or otherwise of previous planning policies. Headline characteristics and trends are listed below.

**Rural as well as Urban** - Although we think of the Plan area as relatively urban (by Highland standards), over a third of the population live in rural areas and 19% live in remote rural areas. Consequently, the Plan must address rural issues as well as urban ones.

**Recent Growth in the Suburbs and Countryside** - Over the last 5 years the main population growth has been in the Inverness expansion areas and rural areas throughout the Plan area. Conversely there has been population decline in the established parts of Inverness and other towns. This suggests the need for urban regeneration, better facilities and connectivity for the suburbs and a check on whether rural areas are suffering or benefiting from development pressure.

**An Ageing Population** - Despite containing areas with the youngest age profile in Highland, the Plan area population is still slightly older than the Scotland average. Areas with the oldest age profile tend to be those which have not seen population growth. The number of over 65s increased by 12% during the last 5 years. Inverness attracts the youngest inward migrants suggesting the need for a full range of housing types and tenures to allow people and families to move through the housing market as they mature. UHI student accommodation demand will also be a factor. Inward migrants to Nairn have an old age profile and the resident population also has an older age profile. This may be affected by a lack of cheaper flexible housing which would attract younger people or that Nairn has lost jobs over the last 10 years when there has been economic growth elsewhere.

**The Pattern of Recent Housing Growth and the Application of Planning Policy** - The last decade has seen a slight reduction in planning pressure overall and a definite reduction in Cromarty Firth and Dingwall & Seaforth Wards: there has been significant growth in Aird & Loch Ness Ward. There was a 15% increase in housing stock over the last decade across the Plan area. 89% of completions were within identified settlements and 57% of completions were on specifically allocated sites. These figures suggest that the Council has been reasonably successful in guiding development to the right places.

**The Effectiveness of the Hinterland Policy and Boundary** - Of the house completions that were not in settlements, 924 were in hinterland areas and 231 outwith the hinterland. However, during that last decade there has been a shift, in that the number of completions on sites outwith the hinterland areas is increasing and the number within the hinterland decreasing. This suggests

that the current Hinterland policy is having some success but may simply be diverting commuter housing pressure further away from our main towns.

**Avoiding Impact on Heritage and Other Safeguarded Areas** - Better information on areas of flood risk has seen a significant reduction in development completions over the last decade within areas liable to flooding. Similarly, there is little evidence of development on, or overly close to, SSSIs, Scheduled Ancient Monuments or Category A Listed Buildings. Development has taken place close to or within Health and Safety Executive consultation zones but only on already developed sites and after proper assessment. 168 new houses have been built on Inverness green wedge areas which suggests that the current policy needs review or more stringent application.

**An Unaffordable Housing Market** - There are no parts of the IMF Plan area where open market housing can be classed as affordable when the current requirement for a 25% mortgage deposit is taken into account. Inward migrants contribute to housing market pressure in Nairn in particular.

**A Typical Economy** - The jobs profile for the Plan area is similar to that for Scotland overall. Growth has been better than the Scotland average over the last decade but despite this, economic performance and therefore incomes are below the Scotland average. In general, incomes fall with increasing distance from Inverness.

**The Need for Urban Regeneration** - 11 datazones in the Plan area are classed as deprived: in most cases this deprivation is persistent and in Merkinch in particular planning policy could play a part in regeneration.

**Transport Network Constraints** - The transport network is a constraint on economic and other development in some areas, particularly in and around Inverness. An Inner Moray Firth Transport Model has been developed which highlights that many strategic junctions and road links are likely to exceed their design capacities within the Plan period.

**Adequate Facilities to Serve New Development** - With a period of continued public expenditure restraint, community facility provision will continue to lag behind the building of new houses. Existing provision can be expanded or used more effectively and catchments re-drawn but more serious mismatches between customers and facilities require new provision. Education infrastructure, in particular within Inverness, is a prime example of this issue. There is a general lack of nursery, primary (16 schools expected to exceed capacity within the Plan period) and secondary (4 expected to exceed capacity) facilities. In terms of geographic mismatch, there is a strong case for an additional secondary school to be identified in east Inverness, perhaps serving the wider A96 corridor.

**An Increase in Housing Densities** - The last 10 years has seen a marked increase in average densities, particularly on urban sites. This can be good and bad. Higher densities make service provision more likely and/or more cost effective whether this is a commercial bus/rail service, broadband, water

and sewerage or a local shop. They can also help deliver more affordable housing units. However, higher densities can without proper consideration lead to poorer living environments, deficiencies in greenspace provision and loss of flood set-back areas.

# INNER MORAY FIRTH LOCAL DEVELOPMENT PLAN

## MONITORING STATEMENT

### 1 INTRODUCTION

The Highland Council is preparing an Inner Moray Firth Local Development Plan (*IMF Plan*) as the new land use plan for development of a scale and nature that are of local significance. The plan will cover the period from 2012 to 2017 but with a vision and principles extending to 2032 and replaces the Inverness Local Plan (2006), Nairnshire Local Plan (2000), Ross and Cromarty East Local Plan (2007) and that part of the Badenoch and Strathspey Local Plan (1997) not now covered by the Cairngorms National Park<sup>1</sup>. The plan will be reviewed on a 5 year cycle.

This monitoring statement provides part of the analysis of the performance of the Structure Plan and conforms to Planning Circular 1 2009: Development Planning. It does not attempt to cover every single aspect of the Plan as a wide range of detailed 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.

This Statement follows the principle of modern development plans and uses maps to display information wherever possible, with more detailed tables being given in an Appendix.

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### 2 LINKS TO OTHER DOCUMENTS

A number of other documents and information sources are available to support the Development Plan process. The Monitoring Statement for the Highland Wide Local Development Plan looks at the performance of the 2001 Highland Structure Plan and is available at:

[HwLDP Monitoring Statement](#)

The Highland Housing Need and Demand Assessment August 2009 gives the current and future requirement for the ten housing market areas in Highland and is the basis for the analysis which follows:

[Housing Need and Demand Assessment](#)

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<sup>1</sup> The Highland Council is still the development plan authority for three parts of the former Badenoch & Strathspey area which are not within CNP, and two of these are in the IMF Area:

- Advie, 151 sq kms, estimated population 143
- Part of Monadhliath, 129 sq kms, no resident population



The Strategic Environmental Assessment Scoping Report for the IMF Plan contains baseline information and maps and is available at:

[IMF SEA Scoping Report](#)

The following maps are given on pages 66 to 91 of this scoping report:

European Bathing Beaches  
Cairngorms National Park  
Core Path Network  
Highland Cycle Network  
Population Change by Ward 1999-2009  
Most Deprived Areas in Highland  
Highland Flood Risk  
Highland Forest and Woodland Strategy  
Hydro Electric Power in Highland  
Highland Council Libraries  
Listed Buildings  
Local Nature Reserves  
National Nature Reserves  
National Scenic Areas  
Ramsar Sites  
Special Areas of Conservation  
Special Protection Areas  
Sites of Special Scientific Interest  
Sewage Treatment  
Settlement Hierarchy  
Waste Facilities – Existing & Proposed  
Waste Water Drainage Hotspots

These maps are not reproduced in this Statement unless the topic is examined in more detail.

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 Housing Land Audit 2010:

[Housing land Audit](#)

b) Profiles of our 22 Wards:

[Ward Profiles](#)

c) Unemployment and Benefits web pages:

[unemployment web pages](#)

d) 2010 based School Roll Forecasts for Highland:

[School Roll Forecasts](#)

e) Various Briefing Notes on the economy, education, Gaelic, housing, migration, population, retail and tourism:

[Briefing Notes](#)

### 3 OVERVIEW OF THE INNER MORAY FIRTH PLAN AREA

Around 132,000 people – 60% of the Highland population – live in the Plan area, which covers 5,130 sq kms. Around 90,000 people – 70% of the IMF population – live in Inverness and the ten other main towns and settlements:

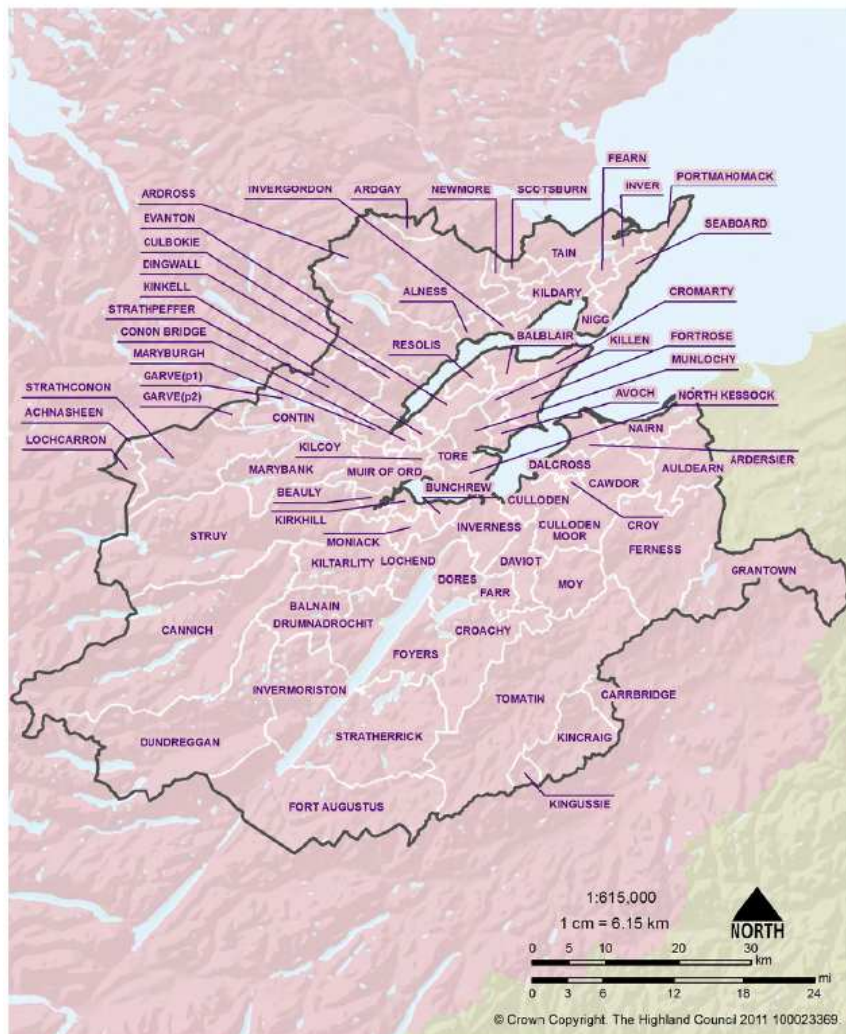
Settlement	Population
Alness	5,340
Beaully	1,250
Dingwall	4,970
Drumnadrochit	1,050
Fort Augustus	720
Fortrose	1,380
Invergordon	3,920
Inverness (incl. Culloden etc)	56,660
Muir of Ord	2,190
Nairn	8,990
Tain	3,420
Source: National Records of Scotland mid 2008 Population Estimates for Settlements	

The Plan area contains the most densely populated parts of Highland and is often regarded as an urban area but it also has a rich natural heritage and contains a significant area of wild land. The highest point is 1,046 mtrs above sea level at the boundary of the Plan area, only 8 miles from the centre of Dingwall.

The Plan area is served mainly from the 11 main settlements, which have all of the secondary schools, leisure facilities hospitals and dental surgeries, and all bar two of the libraries. However, some services such as primary schools and GPs surgeries are also provided locally in rural areas. The main transport links are the 55 mile long Tain / Nairn arc serviced by the A9 and A96 and the rail link, and the 75 mile long Tain / Fort Augustus route serviced by the A9 and A82.

The four former Local Plans covering the area identified 110 Settlement Development Areas. Their sizes range from 9,570 sq mtrs (Littlemill) to 48.4 sq kms (Inverness) making them difficult to represent on a simple map. The Council has identified settlement zones across Highland which are useful areas for summarising spatial information and are occasionally used below to present information. They are natural communities based on historic primary school catchments and Community Councils / Civil Parishes, and the 66 settlement zones in the Plan area are shown on the map below.

## Inner Moray Firth Local Development Plan Settlement Zones



## 4 POPULATION

### 4.1 Current Population

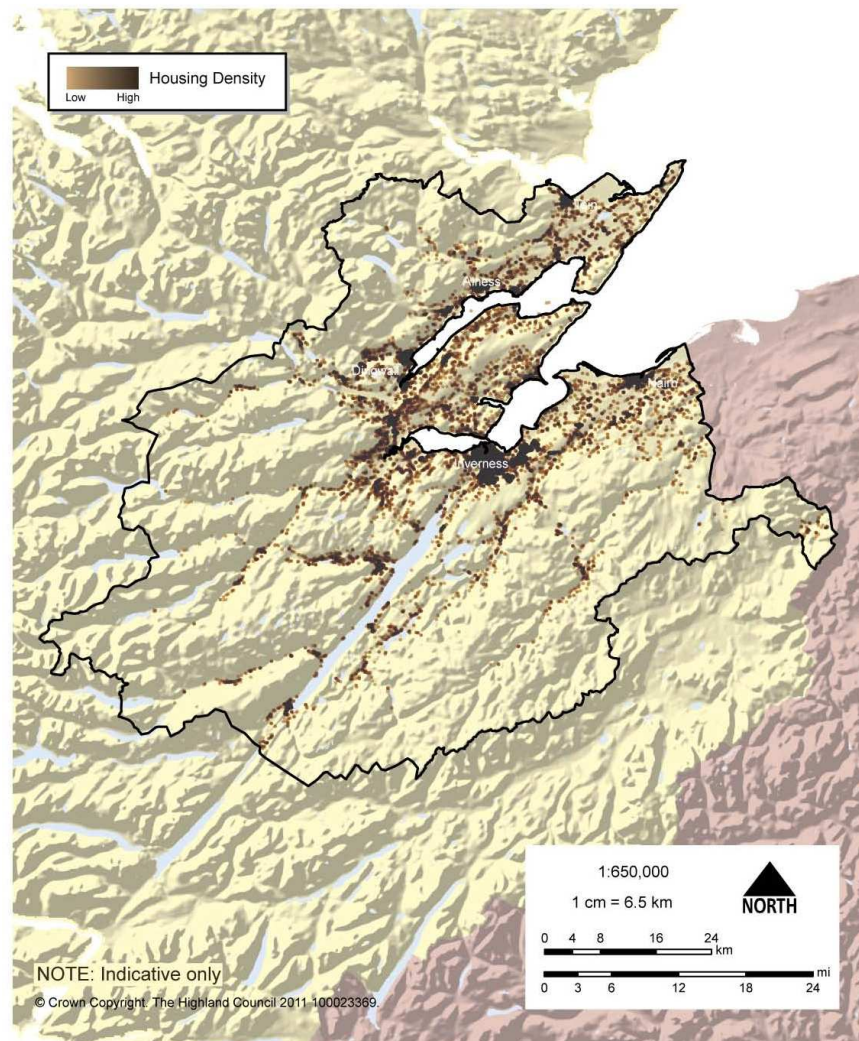
Highland has a population which is “older” than that of Scotland overall with a lower percentage of people aged under 50 and a correspondingly higher percentage aged over 50. The IMF Plan area contains some of the youngest populations in Highland – such as in Alness and Inverness South and Milburn - and does not generally have local concentrations of extremely unbalanced population such as found in parts of (eg) Sutherland. The net result is that the IMF Plan area has a population which, although younger than the Highland average, is still slightly older than that of Scotland overall.

IMF PLAN AREA TOTAL POPULATION BY AGE GROUP, 2010				
as a percent of the total population				
	IMF	IMF	<i>Highland</i>	<i>Scotland</i>
	Number	Percent	<i>Percent</i>	<i>Percent</i>
<b>0 to 15</b>	24,008	18.2	17.6	17.5
<b>16 to 49</b>	56,668	43.0	41.4	46.2
<b>50 to 64</b>	28,017	21.2	22.2	19.5
<b>65 to 74</b>	12,668	9.6	10.4	9.1
<b>75 to 84</b>	7,594	5.8	6.2	5.7
<b>85+</b>	2,894	2.2	2.3	2.0
<b>All Ages</b>	131,848			
Source: Highland Council based on National Records of Scotland Small Area Population Estimates 2010				

The map below shows schematically how the population is distributed across the IMF Plan area with one dot per house. It shows that the population is concentrated in areas of flat land and in valley bottoms, with the majority of the area virtually uninhabited.

## Inner Moray Firth Local Development Plan

### *Where People Live*



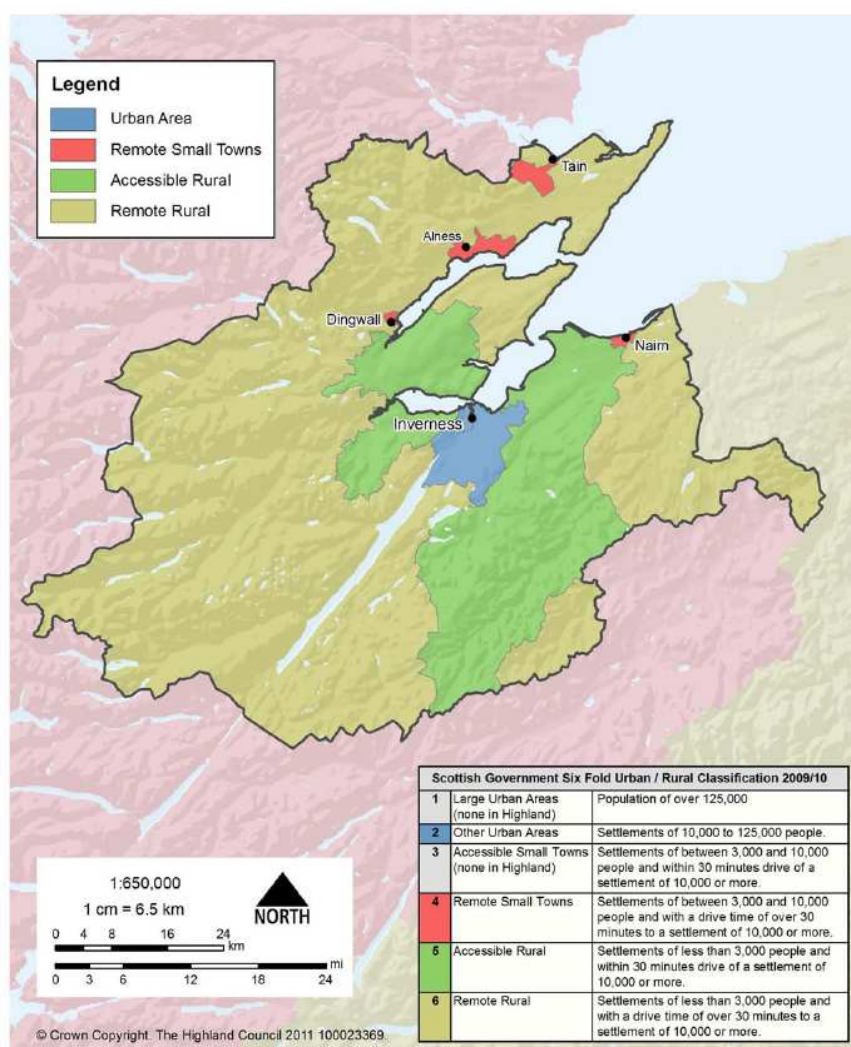
The Scottish Government has developed the six-fold urban / rural classification shown on the map below, which allows the dispersed nature of the population in the IMF Plan area to be compared with Scotland overall.



# Inner Moray Firth Local Development Plan

## Urban / Rural Areas

2009/10



The table shows that almost half of the population lives in an urban area (Inverness), with the remained distributed between small towns, accessible and remote rural areas. Despite being densely populated by Highland standards, 35% of the IMF Plan population live in rural areas compared to the Scotland average of 15%.

IMF PLAN AREA POPULATION BY SCOTTISH GOVERNMENT URBAN – RURAL CLASSIFICATION 2009/10					
	Urban - Rural Classification	IMF Total	IMF Percent	Highland Percent	Scotland Percent
Large Urban (none in Highland)	1	0	0.0	0.0	38.9
Other Urban	2	58,390	44.5	25.8	30.6
Accessible Small Towns (none in Highland)	1	0	0.0	0.0	8.5
Remote Small Towns	4	26,400	20.1	23.1	3.8

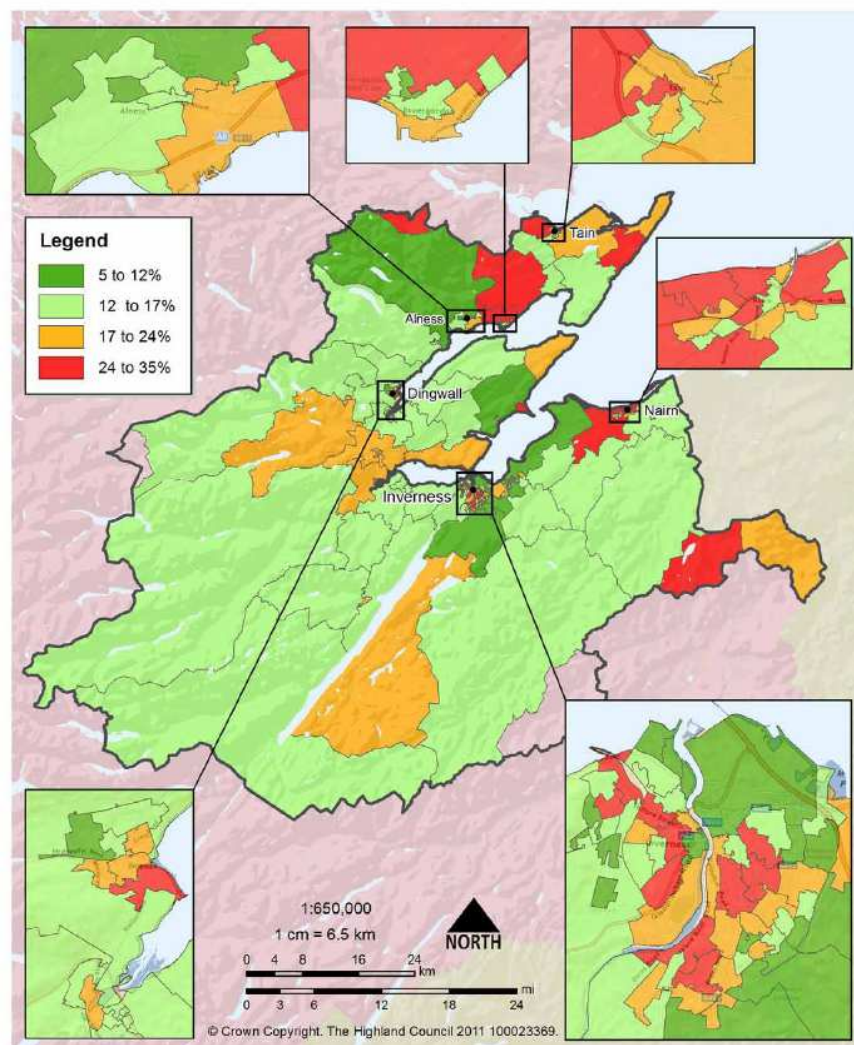
<b>Accessible Rural</b>	5	21,910	16.7	10.5	11.6
<b>Remote Rural</b>	6	24,430	18.6	40.6	6.5
<b>IMF</b>		131,110	100	100	100

Source: Highland Council based on National Records of Scotland Small Area Population Estimates 2009 and SG Percentage Population Estimates by Urban-Rural Classification

## 4.2 The Age Profile of the Current Population

As described briefly earlier, the population of the IMF Plan area is slightly older than that of Scotland overall, but the average figures mask significant local variation. The map below shows that the percentage of the population aged 65 and over (by datazone) varies between 5% and 35%, and that the higher percentages tend to be found in some (mainly non-commuter) rural areas and urban areas which have seen little recent new house building.

### Inner Moray Firth Local Development Plan Percentage of Population Aged over 65 by Datazone



### 4.3 Population Change

Over the last five years the population of the IMF Plan area increased by 6.3%, from 123,380 to 131,110. The table below shows the change by age group and confirms the trend of an ageing population with higher percentage increases in the older age groups, rising from a 1.6% increase in 0 to 15 year olds to a 12.4% increase in over 65s. The overall rate of growth in the IMF Plan area is higher than that for Highland overall (6.3% and 4.3% respectively) but general trends by age are similar. Full details of population change at a local level are given in Briefing Note 41<sup>2</sup>

<b>IMF Plan Area Population Change by Age Group, 2004 to 2009</b>					<b><i>Highland</i></b>
	<b>2004</b>	<b>2009</b>	<b>Change</b>	<b>Change</b>	<b><i>Change</i></b>
			<b>Number</b>	<b>Percent</b>	<b><i>Percent</i></b>
<b>0-15</b>	23,560	23,940	380	1.6	<i>-1.4</i>
<b>16-44</b>	45,200	46,430	1,230	2.7	<i>-0.2</i>
<b>45-64</b>	34,380	37,990	3,610	10.5	<i>9.2</i>
<b>65+</b>	20,240	22,750	2,510	12.4	<i>11.6</i>
<b>All Ages</b>	123,380	131,120	7,740	6.3	<i>4.3</i>
Source: Highland Council based on National Records of Scotland Small Area Population Estimates					

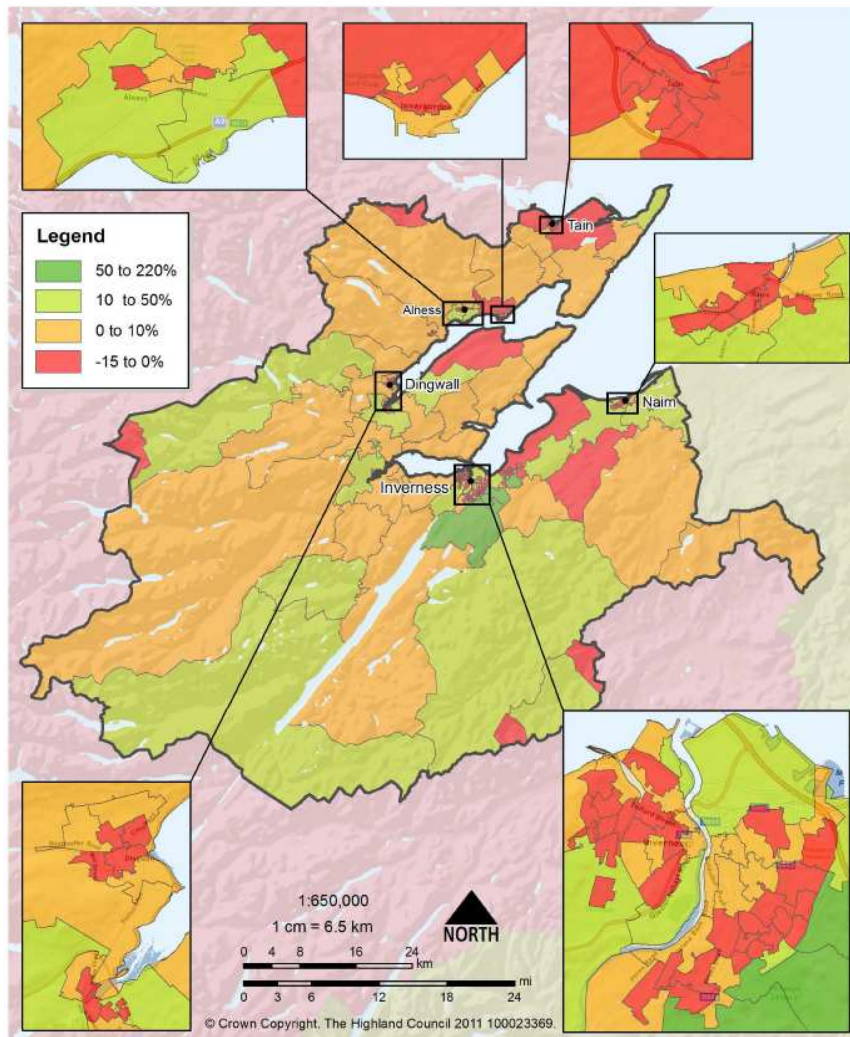
<sup>2</sup> Briefing Note 41 - Small Area Population Estimates 2009 and accompanying spreadsheet at [briefing notes](#).



## Inner Moray Firth Local Development Plan

### *Population Change 2004 to 2009*

by Datazone



#### 4.4 Migration to and from the Inner Moray Firth Area

The number of births in Highland exceeded the number of deaths in each of the three years ending mid 2010, the first time we have seen natural population growth since 1996/97. Given our ageing population, this is expected to be a short lived phenomenon and we will be dependent on inward migration to maintain and grow our population. The numbers and age profiles of future migrants will be crucial to the economic success of Highland, and the variation between different parts of the IMF Plan area suggests that different types of new housing will be required to meet future requirements.

The charts below give annual average migration<sup>3</sup> to three parts of the IMF Plan area for the period 2004 to 2008. This was a period of high inward migration and although we do not have long term records with this level of detail, the available evidence shows that the general patterns are consistent with long term trends. Common features across all three areas are:

- A net gain of around 300 children aged under 15 each year, showing that we gained families;
- The loss of around 700 young people in the 15 to 19 age group each year, mainly to higher education;
- Gains in all age groups from age 20 onwards with significant inward migration by people in their 20s, many thought to be young people who left for higher education returning to the area; and
- A net gain of around 80 people aged 75 plus each year.

The differences between the three area migration profiles give an insight into the different types of housing that might be required in the future, although we cannot ignore the fact that the historic pattern of house building and availability may have influenced migration patterns.

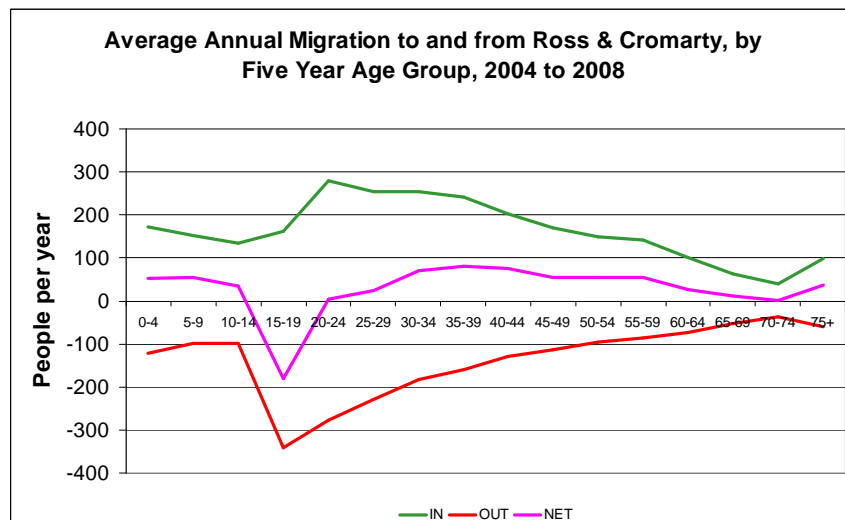
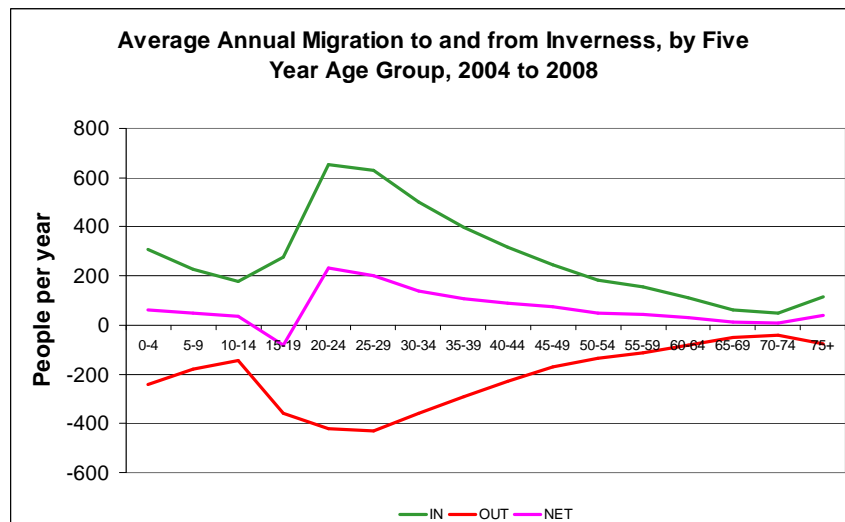
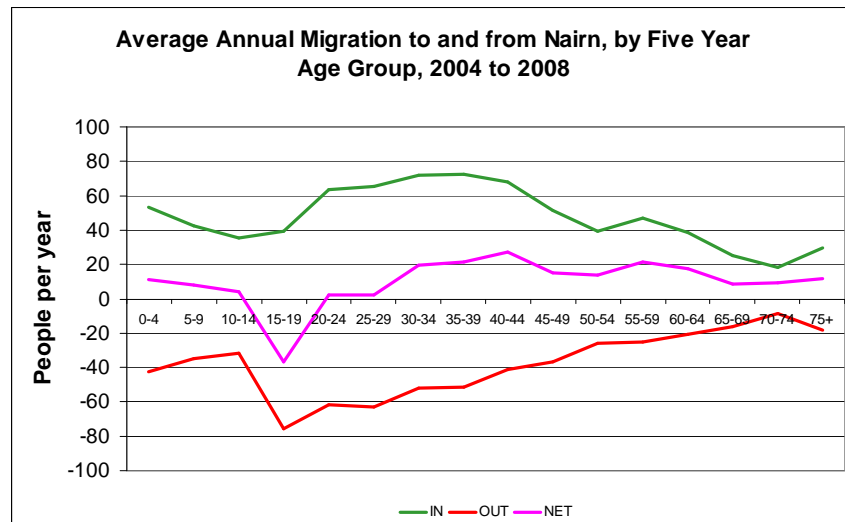
In **Nairn**, the peak age group for inward migrants is 30 to 39 with a secondary peak in the 55 to 59 age group, suggesting that house buyers will include significant numbers of established families and those contemplating retirement, and with well established incomes.

In **Inverness**, inward migration is dominated by people in their 20s, a time when they tend to be single and often look for mobility as they build their careers and increase their income. Starter homes, private rented accommodation and houses in multiple occupancy are an important part of the market. It is worth noting that the future housing requirement does not take the potential growth of UHI into account as they were not able to provide forecasts of future student numbers at the time of preparing the Housing Need and Demand Assessment, and this is likely to result in a greater requirement for the type of housing noted above.

**Ross & Cromarty** lies between the two, with peak inward migration in the 20 to 24 age group and a relatively smooth declining trend with age and minor peaks in the 30 to 39 and 55 to 59 age groups, as for Nairn.

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<sup>3</sup> Source: National Records of Scotland, figures are for the former 1996 District Council areas. XX% of Ross & Cromarty is in the IMF Plan area.

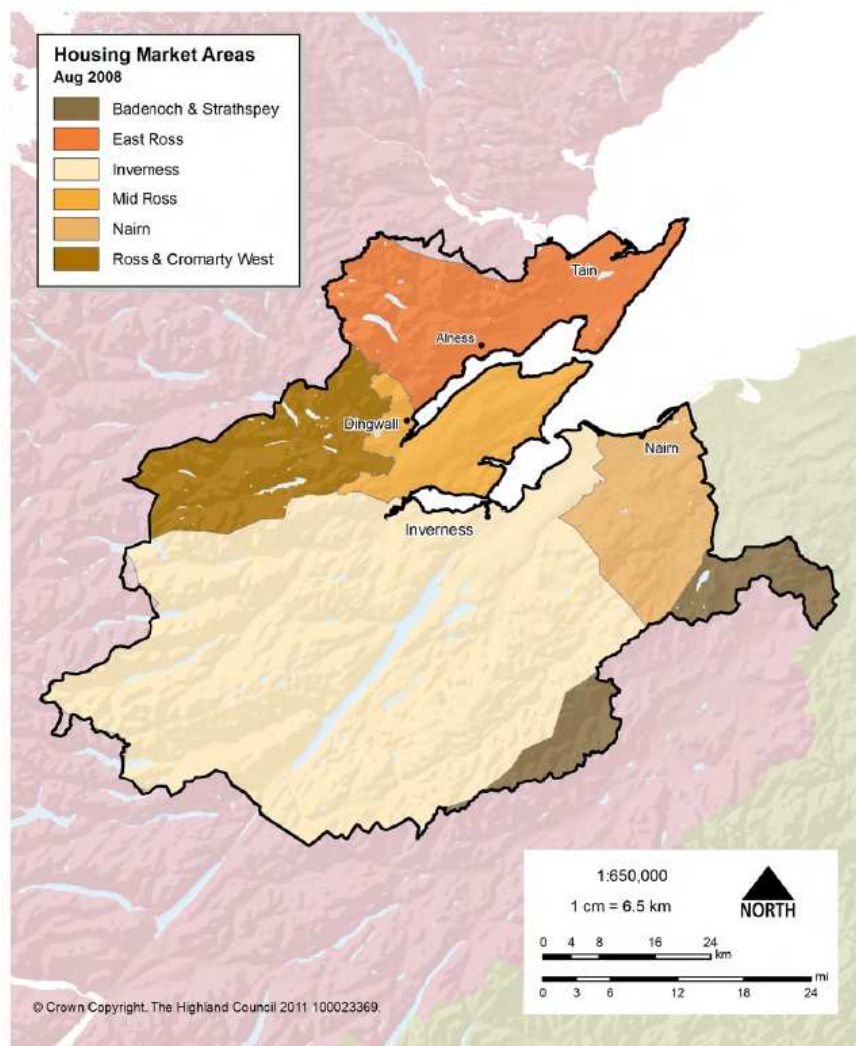


## 5 HOUSING - BACKGROUND

## 5.1 Housing Market Areas (HMAs)

Highland's Housing Need and Demand Assessment describes the HMAs in Highland, and those in the IMF Plan area are shown on the map below. Four of the HMAs (East Ross, Mid Ross, Inverness & Nairn) lie totally within the IMF Plan area whereas only 26% of the West Ross HMA – in terms of house numbers – lies in the IMF Plan area. There are only 76 houses in the IMF Plan area which are within the Badenoch & Strathspey HMA.

### Inner Moray Firth Local Development Plan *Housing Market Areas*



## 5.2 Housing Stock

In September 2010 there were 61,671 houses in the IMF Plan Area, of which 11,178 were affordable (7,955 owned by the Highland Council and 3,223 by Housing Associations). There is a considerable variation in the proportion of housing that is affordable, with 28% of affordable housing in East Ross and

only 10.5% in the part of West Ross that lies within the IMF Plan area. There are 132 registered Houses in Multiple Occupancy in the area, the majority in Inverness City.

Tables T1 and T2 in the Appendix give the detailed breakdown of stock by Settlement Development Area and Settlement Zone.

<b>Inner Moray Firth Local Plan Area, Housing Stock by Ward, 2011</b>					
<b>Ward Name</b>	<b>All Properties</b>	<b>Affordable Housing - Housing Association</b>	<b>Affordable Housing - Highland Council</b>	<b>HMOs (Number of Licensed Occupants)</b>	<b>Private Rented Properties</b>
<b>Aird and Loch Ness</b>	5,380	115	310	0	527
<b>Badenoch and Strathspey (part)</b>	71			0	21
<b>Black Isle</b>	4,498	55	314	1 (7)	348
<b>Caol and Mallaig (part)</b>	22			0	2
<b>Cromarty Firth</b>	5,661	528	1,341	7 (38)	337
<b>Culloden and Ardersier</b>	5,141	94	558	5 (33)	649
<b>Dingwall and Seaforth</b>	5,405	257	875	8 (96)	400
<b>Inverness Central</b>	7,073	690	1,841	52 (448)	823
<b>Inverness Millburn</b>	3,880	159	389	70 (261)	324
<b>Inverness Ness-Side</b>	5,384	255	469	9 (78)	520
<b>Inverness South</b>	5,309	281	46	4 (25)	620
<b>Inverness West</b>	4,069	196	426	12 (67)	386
<b>Nairn</b>	5,465	292	634	7 (74)	482
<b>Tain and Easter Ross</b>	4,332	268	618	0	269
<b>Wester Ross, Strathpeffer and Lochalsh (part)</b>	1,358	33	105	3 (52)	148
<b>IMF</b>	63,048	3,223	7,926	178 (1,179)	5,856
Source: Highland Council Records					

## 6 PLANNING PRESSURE

The table and maps below show the pressure from planning application of all types over the last decade, divided into two five year periods to highlight any pattern of change through time. The greatest number of applications in each period was in the two rural wards of Aird & loch Ness and Black Isle, and there was little change in the total number of applications in each period. There was an increase in the number of applications in Aird & loch Ness, with significant reductions in Cromarty Firth, Dingwall & Seaforth, Inverness Millburn and Culloden & Ardersier.

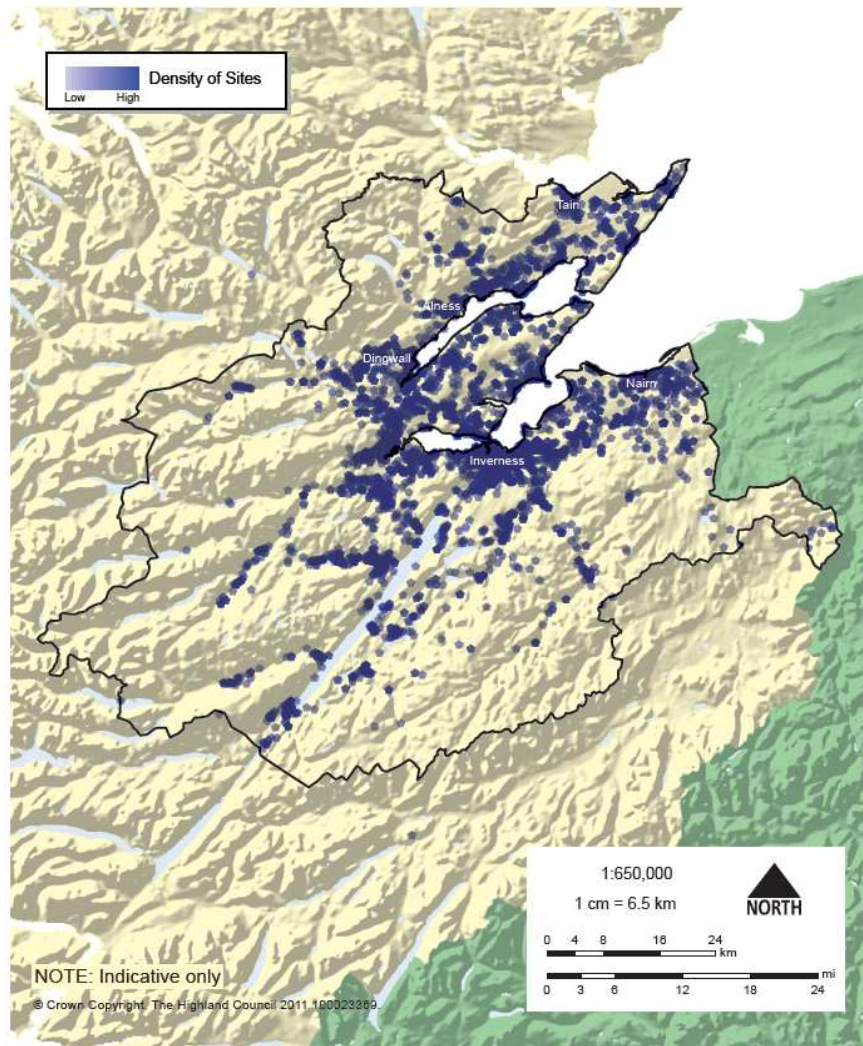
<b>Planning Applications (all types) in the IMF Plan Area 2001 to 2005 and 2006 to 2010, by Ward</b>				
<b>Ward</b>	<b>2001 to 2005</b>	<b>2006 to 2010</b>	<b>Change Number</b>	<b>Change %</b>
<b>Aird and Loch Ness</b>	1,712	2,032	320	15.7
<b>Black Isle</b>	1,289	1,218	-71	-5.8
<b>Cromarty Firth</b>	800	679	-121	-17.8
<b>Culloden and Ardersier</b>	816	707	-109	-15.4
<b>Dingwall and Seaforth</b>	893	743	-150	-20.2
<b>Inverness Central</b>	917	898	-19	-2.1
<b>Inverness Millburn</b>	556	481	-75	-15.6
<b>Inverness Ness-Side</b>	463	443	-20	-4.5
<b>Inverness South</b>	857	893	36	4.0
<b>Inverness West</b>	344	322	-22	-6.8
<b>Nairn</b>	872	810	-62	-7.7
<b>Tain and Easter Ross</b>	810	854	44	5.2
<b>Wester Ross, Strathpeffer and Lochalsh (part)</b>	349	308	-41	-13.3
<b>Grand Total</b>	10,678	10,388	-290	-2.8



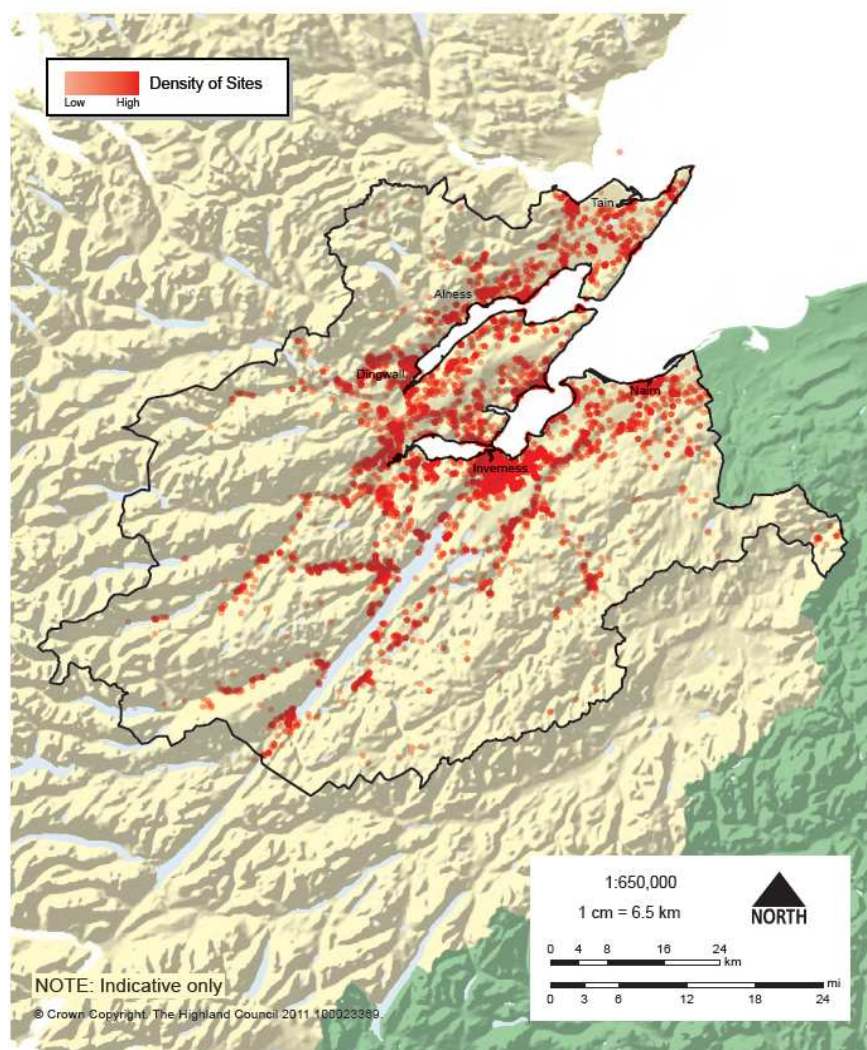
# Inner Moray Firth Local Development Plan

## *Planning Applications Pressure Array*

2001 – 2005 (Calendar years)



# **Inner Moray Firth Local Development Plan** *Planning Applications Pressure Array* 2006 – 2010 (Calendar years)



## **7 NEW HOUSE COMPLETIONS 2000 to 2010**

### **7.1 New House Completions - Overview**

Between 2000 and 2010, 9,390 new houses were built in the IMF Plan area, increasing the stock by 15.2%. The table below shows that the percentage increase in stock in Inverness and Nairn was virtually identical (17.3% and 17.0% respectively) with the lowest increase in East Ross (10.0%).



IMF Plan Area House Completions Jan 2000 to Dec 2010 by Housing Market Area and Year													
Housing Market Area	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	All Years	% Increase in Stock
Badenoch and Strathspey (part)	1			2								3	3.9
East Ross	39	66	84	75	52	82	94	128	124	156	79	979	10.0
Inverness	416	425	437	544	427	575	766	920	646	429	441	6,026	17.0
Mid Ross	128	108	123	138	190	97	80	101	109	148	92	1,314	13.5
Nairn	106	66	66	124	96	108	87	67	60	19	124	923	17.3
West Ross (part)	6	13	7	13	10	11	17	8	17	40	3	145	10.9
IMF	696	678	717	896	775	873	1,044	1,224	956	792	739	9,390	15.2

## 7.2 New House Completions in Settlement Development Areas (SDAs)

Table T3 in the Appendix gives a detailed analysis of the location of new house completions in those settlement zones that have SDAs, and this is summarized in the table below. It shows that 88.9% of all completions were within SDAs, and that of these completions, 57% were on allocated sites and 43% were effectively windfall (ie not on sites allocated in Local Plans).

New House Completions Jan 2000 to Dec 2010 - Completions Within Settlement Development Areas				
Completions on Allocated Sites	Completions not on Allocated Sites	All Completions Within SDAs	All Completions	Percentage of Completions Outwith SDAs
4,653	3,582	8,235	9,264	11.1

## 7.3 New House Completions in Hinterland Areas

The Inverness, Nairn and Ross & Cromarty East Plans all have policies which seek to control development outwith SDAs in rural areas which are attractive to commuters to major towns – the “hinterland” policies. Table T4 in the Appendix gives a more detailed analysis of new housing within the hinterland areas, summarised in the table below for a shorter 10 year period. It shows that 710 new houses were built in the areas covered by the hinterland policies, 7.7% of all completions in the IMF plan area.

Of the 255 completions which were outwith hinterland areas, 94 were in the five year period between 2001 and 2005, and 140 were between 2006 and 2010, an increase of 49%. This compares with a decrease of 9% in the number of completions within the hinterland areas over the same periods.

<b>New House Completions Jan 2001 to Dec 2010 - Completions Outwith Allocated Local Plan Sites and Settlement Development Areas by 5 Year Periods</b>					
	<b>Completions Outwith Hinterland</b>	<b>Completions Within Inverness Hinterland</b>	<b>Completions Within RACE Hinterland</b>	<b>Completions Within Nairn Hinterland</b>	<b>Total Hinterland Completions</b>
<b>2001 to 2005</b>	94	201	138	33	372
<b>2006 to 2010</b>	161	182	114	42	338
<b>10 year Total</b>	255	383	252	75	710

## 7.4 New House Completions in Flood Risk Areas

Flood risk areas first became available to the Highland Council, in the form of A4 paper maps, in 2006 with more detailed GIS shapefiles which can be used for systematic work not available until 2007. The summary table below shows that 659 completions between 2000 and 2010 (7.0% of all completions during the period) were in 1 in 200 year flood risk areas. However, the number has fallen considerably since 2007 as permission is no longer granted for building in potential flood risk areas without a full assessment and mitigation if necessary. Table T5 in the Appendix gives the locations of the sites involved.

<b>New Housing Completions in 1 in 200 year Return Period Flood Risk Areas, Jan 2000 to Dec 2010, by Year</b>												
<b>Type</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>Grand Total</b>
<b>Coastal</b>	1				1	37		22		2		63
<b>Coastal &amp; Fluvial</b>			1		15				8	16		40
<b>Fluvial</b>	35	31	31	42	137	89	69	77	7	19	19	556
<b>Grand Total</b>	36	31	32	42	153	126	69	99	15	37	19	659

Source: Highland Council completion records & SEPA 1 in 200 year Flood Risk Areas

## 7.5 New House Completions Within or Close to Sites of Special Scientific Interest (SSSIs)

The table below shows that 4 new houses were built within SSSIs and 3 were built within 20 mtrs of the boundary of an SSSI.

<b>New House Completions Inside or Within 20 mtrs of a Designated SSSI, Jan 2000 to Dec 2010</b>	
<b>Location</b>	<b>Site</b>
Ardersier	3 completions within Ardersier Glacial Deposits SSSI (6 existing houses on this SSSI)
Beaully	1 completion adjacent to Beaully Firth SSSI
Culloden (Ardturlie)	1 completion adjacent to Longman & Castle Stuart Bays SSSI
Inver	1 completion adjacent to Morrich More SSSI
Inverness	1 completion within Torvaen landform SSSI (28 existing houses on this SSSI)

Source: Highland Council completion records & SNH Sites of Special Scientific Interest

## **7.6 New House Completions Within or Close to Health and Safety Executive Exclusion Zones**

109 new houses were completed within the HSE exclusion zone around the Large Scale Petrol Storage Site at GB Oils Ltd on Cromwell Road, Inverness. 106 were on the west side of the river in Merkinch East and three were in the Longman area to the east of the river. There were 102 existing houses in the exclusion area prior to completion of this new housing.

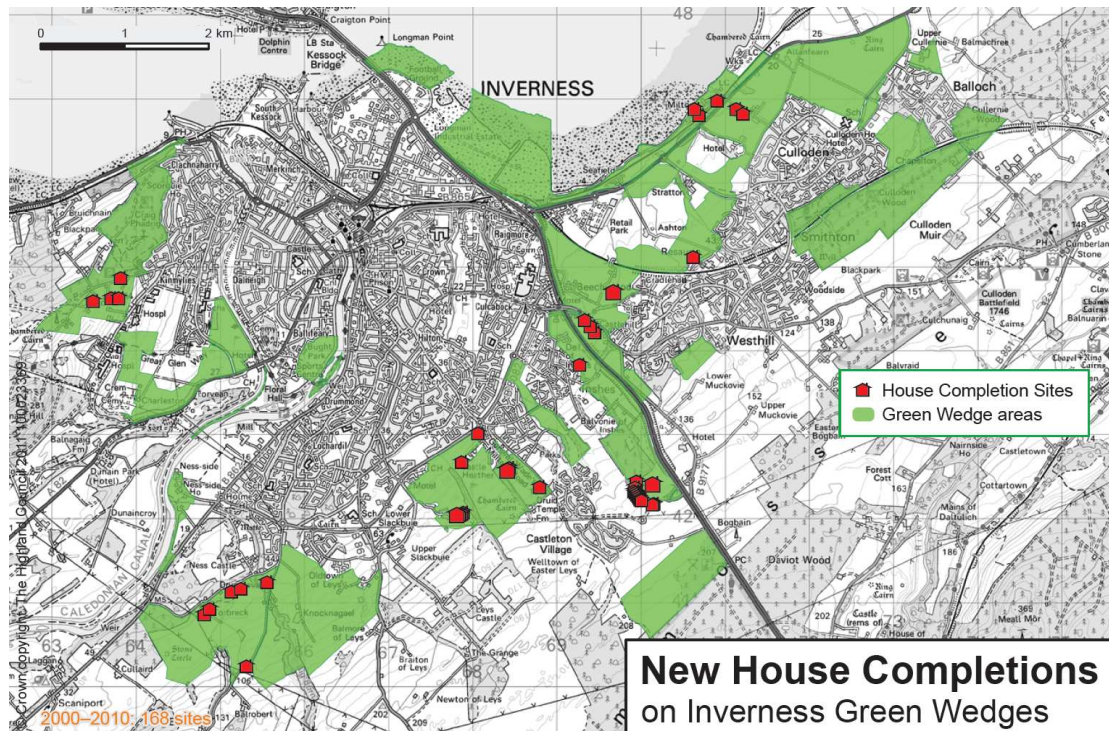
## **7.7 New House Completions within 50 metres of Scheduled Ancient Monuments and Category A Listed Buildings**

152 new houses were built within 50 mtrs of a category A listed buildings and Table T6 in the Appendix gives their locations. In the majority of cases the new house is a conversion of an existing building which previously had a different use: a good example is that 30 of these completions were within 50 mtrs of the Town Steeple on High Street Inverness and are the result of the conversion of three former office blocks and commercial premises.

56 new houses were built within 50 mtrs of a Scheduled Ancient monument, 37 of these adjacent to the Balloan Cottages pit, circle and enclosure to the west of the Fairways roundabout on the Inverness southern distributor road. The full list of locations is given in Table T7 in the Appendix.

## **7.8 New House Completions in Inverness Green Wedge Areas**

The 2006 Inverness Local Plan, and its predecessor, both contained “green wedge” policies aimed at protecting open areas for recreation and biodiversity. Since 2000, 168 new houses have been built in designated green wedge areas as shown on the map below. 53 of these were built in Milton of Leys as part of the 2010 Housing Fair with seven subsequent completions, leaving extant permission for a further 40 houses on this site.



## 8 RENEWABLE ENERGY

Government policy favours renewable energy developments as a way of both meeting environmental targets and contributing to economic growth. The HwLDP proposes a policy that supports renewable projects where they can be assessed favourably against our Renewable Energy Strategy and Supplementary Guidance, and where they will not have a significant detrimental impact on key interests. The Council monitors wind and hydropower developments and up to date maps and tabular information are available on our website<sup>4</sup>. The maps below are an extract from this Highland wide information in June 2011.

### 8.1 Wind Farms (strategic schemes with a blade tip height of more than 50 metres)

In June 2011 there were five operational schemes in the IMF Plan area with 113 turbines giving a total generating capacity of 184 MW. The status and location of these and other planned schemes are given in the table and map below.

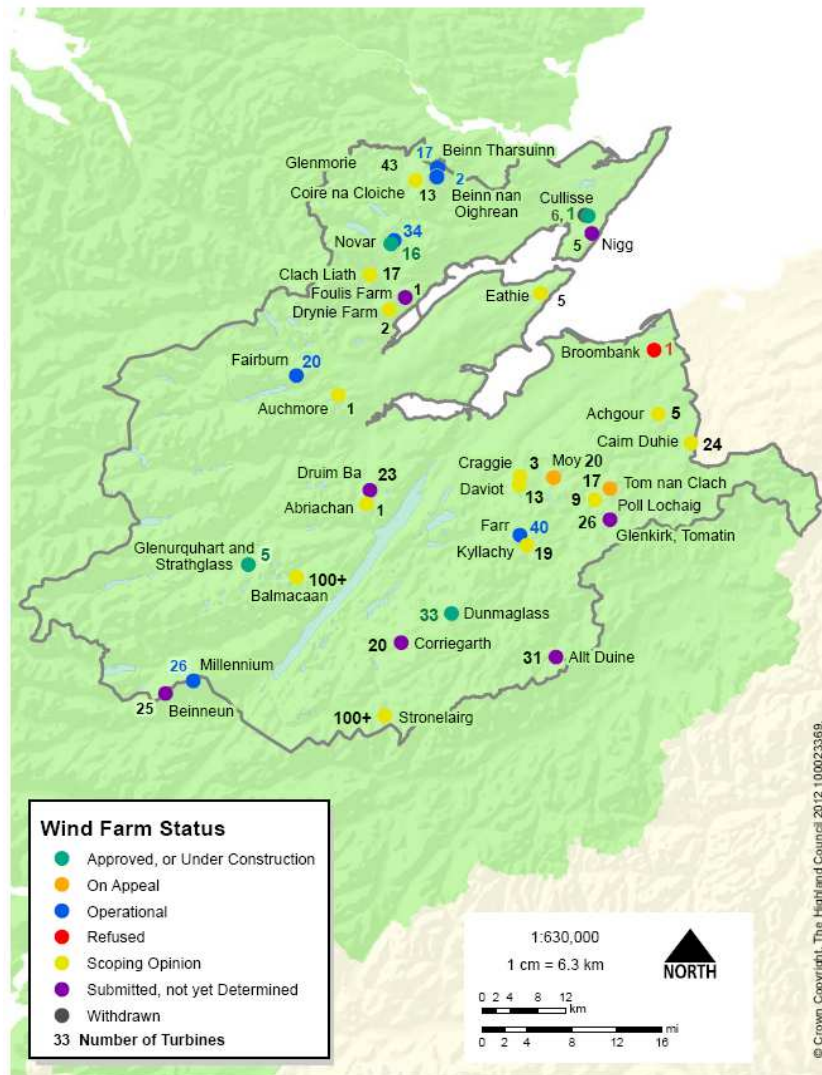
<sup>4</sup> <http://www.highland.gov.uk/yourenvironment/planning/energyplanning/renewableenergy/>

<b>Wind Farm Activity in the IMF Plan Area, November 2011</b>			
<b>Status</b>	<b>Number of Schemes</b>	<b>Number of Turbines</b>	<b>Capacity (mega watts)</b>
<b>Operational</b>	5	113	184
<b>Approved, or Under Construction</b>	4	55	146
<b>Submitted, but not yet Determined</b>	8	150	436
<b>Scoping Opinion</b>	13	111	121
<b>On Appeal</b>	2	37	80
<b>Refused</b>	1	-1	-1
<b>Withdrawn</b>	1	6	5
<b>Total</b>	34	471	971
Source: Highland Council records			

In addition, there are four schemes just to the south of the IMF area overlooking Glen Garry, with 51 turbines and a generating capacity of 150 mega watts: 26 turbines on three sites are operational and 26 turbines on one site have yet to be determined.

## Inner Moray Firth Local Development Plan

### Wind Farm Activity



## 8.2 Hydro Electric Power (strategic schemes with a generating capacity of more than 0.5 mega watt)

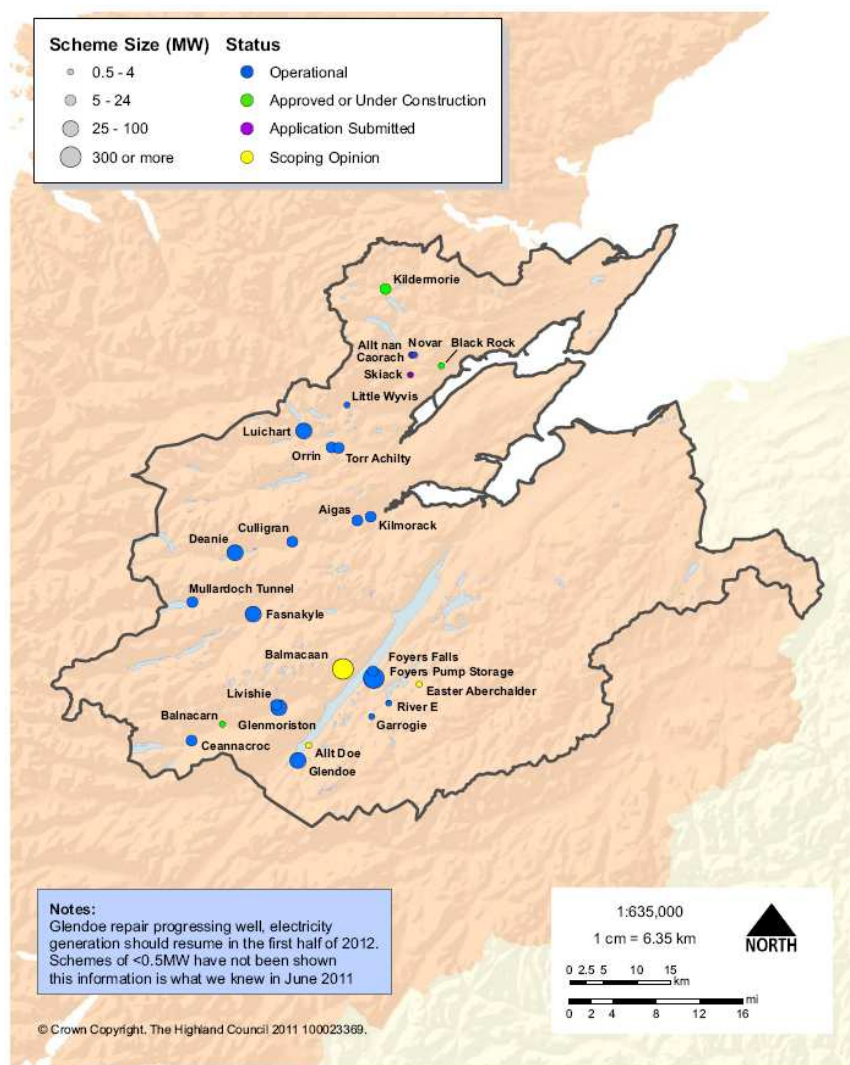
In June 2011 there were 19 operational schemes in the IMF Plan area with a capacity of 737 mega watts: these include the major pumped storage schemes at Foyers (300 MW) and Glendoe (100 MW), the latter currently under repair and expected to start operating again in 2012.



Hydro Electric Power Activity in the IMF Plan Area, June 2011		
Status	Number of Schemes	Capacity (mega watts)
Operational	19	737
Approved, or Under Construction	3	12
Submitted, but not yet Determined	2	4
Scoping Opinion	3	602
<b>Total</b>	<b>27</b>	<b>1,355</b>
Source: Highland Council records		

## Inner Moray Firth Local Development Plan

### Hydro Electric Power



## 9 HOUSE SALES

## 9.1 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
- Information on household incomes, by *intermediate zone*<sup>5</sup>, from the Paycheck dataset marketed by CACI. (More information on income is given later).

Income data 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. One common measure is to compare the lower quartile house price (ie a quarter of all houses are sold for a price of less than this) with the average annual household income and assume that a responsible mortgage will be 2.9 times the income.

Table T8 in the Appendix gives the result of this analysis for 2010<sup>6</sup> for all settlement zones in the IMF Plan area where there were more than 10 sales. It shows that houses in Culloden might be considered "affordable" by this measure and that affordability in Ardersier, Invergordon and Seaboard is marginal. However, the measure was devised before the onset of the credit crunch, and subsequent tightening of mortgage availability means that most lenders now require a deposit of at least 20% of the sale price. Within the IMF Plan area this would require a deposit of at least £16,000 and this extra burden almost certainly means that all areas should be classed as unaffordable.

## 9.2 The Origin of House Buyers

The section above on migration can be complemented at a slightly more 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. The table below shows the origin of all buyers during the calendar years 2006 to 2010 and looks at open market sales only:

- 56.1% of houses in **East Ross** were sold to existing residents, with the lowest percentage of sales to buyers outwith Highland (20.1%).
- **Inverness** has the highest percentage of sales to buyers already living locally (64.5%) and a low percentage to buyers from outwith Highland (20.2%). Put together with the migration figures given earlier, this suggests that young people moving to Inverness might start in flexible rented / HMO accommodation before moving into starter homes and then family homes,

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<sup>5</sup> Standard geographical areas containing between 2,500 and 6,000 people.

<sup>6</sup> The latest available.



and that that a broad spectrum of new housing is required which can cater for this flow through the market.

- **Mid Ross** has a low percentage of sales to buyers living locally (48.4%) and to buyers from outwith Highland (19.6%), and a small but significant number of sales to buyers from Inverness (18.6%).
- **Nairn** has a low percentage of sales to buyers living locally (52.1%) and a high percentage of sales to buyers from outwith Highland (30.3%), and is particularly popular with buyers from the rest of Scotland. The migration profiles given earlier suggest that inward migrants tend to be mature and may well have high levels of equity, with a requirement for both larger family houses and more manageable homes once children have left home, but resulting in a stressed local market.
- Despite its proximity to the relatively urban IMF area, the part of the **West Ross** HMA that lies within the IMF Plan area has the characteristics of the west coast / island areas with an even split between local buyers and those from the rest of Highland and the rest of the UK. The comments above for Nairn are even more relevant here.

Origin of Buyers of Houses in the Inner Moray Firth Area 2006 to 2010, as a Percentage of All Buyers Open Market Sales Only					
	Housing Market Area of House				
Origin of House Buyer	East Ross	Inverness	Mid Ross	Nairn	West Ross (part)
Rest of Scotland	11.1	14.0	11.6	19.5	18.4
Rest of UK	8.4	5.5	7.4	9.5	14.1
Overseas	0.7	0.7	0.5	1.3	2.2
Badenoch and Strathspey	0.4	1.3	0.7	1.1	0.5
Caithness	0.6	0.6	0.6	0.3	1.1
East Ross	56.1	1.7	3.0	0.3	1.6
Inverness	8.4	64.5	18.6	10.8	11.4
Lochaber	0.5	0.9	0.9	0.3	0.5
Mid Ross	6.0	5.3	48.4	1.6	17.8
Nairn	0.8	1.8	1.1	52.1	2.2
West Ross	1.2	1.1	3.9	0.3	27.0
Skye and Lochalsh	0.5	0.6	0.7	0.3	0.0
Sutherland	3.7	0.9	0.9	0.3	0.5
Unknown	1.7	1.0	1.7	2.1	2.7
Number of Sales (100%)	1,281	7,449	1,425	1,168	185
Source: Registers of Scotland / Scottish Government, analysis by the Highland Council					

## 10 THE ECONOMY OF THE IMF 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<sup>7</sup> areas, and can be measured as GVA<sup>8</sup> per head. It shows that the GVA per head in 2009 varied between 80% of the UK average in Inverness and Nairn, and 69% in Caithness & Sutherland and Ross & Cromarty. However, both have improved against the UK economy over the last decade (from 72% to 80% and 64% to 69% respectively).

### 10.1 Employment

The current profile of jobs in the IMF Plan Area is given in the table below together with a Highland and Scotland comparison, and this belies to some extent the traditional view that the area is particularly dependent on the primary sector. It shows that the IMF Plan area has an employment profile that is generally similar to that of Scotland overall, with the main difference a higher percentage of jobs in health which can be attributed to Raigmore hospital and satellites acting as specialist centres serving all of Highland. There are also slightly higher percentages in retail and transport while there are lower percentages of jobs in the high earning financial and professional, scientific and technical sectors. Both the IMF area and Highland overall have a higher percentage of part time jobs.

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<sup>7</sup> Standard geographic areas used for European statistics "Nomenclature of Units for Terrestrial Statistics". The IMF Plan areas is covered by the minor part of the Caithness, Sutherland and Ross & Cromarty NUTS3 area and around half of the Inverness, Nairn, Moray and Badenoch & Strathspey NUTS3 area.

<sup>8</sup> 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.

Jobs In The Inner Moray Firth Area, By Ward And Broad Industrial Group 2010, as a Percentage of All Jobs			
Broad Industrial Group	IMF Plan Area	Highland	Scotland
1 : Agriculture, forestry & fishing (A)	0.8	1.4	1.6
2 : Mining, quarrying & utilities (B,D and E)	1.4	2.5	2.8
3 : Manufacturing I	6.1	5.9	7.5
4 : Construction (F)	5.9	5.5	5.3
5 : Motor trades (Part G)	2.9	2.4	1.9
6 : Wholesale (Part G)	3.0	2.6	3.0
7 : Retail (Part G)	11.1	10.7	10.2
8 : Transport & storage (inc postal) (H)	5.5	4.8	4.0
9 : Accommodation & food services (I)	7.2	10.4	7.1
10 : Information & communication (J)	2.7	2.4	2.7
11 : Financial & insurance (K)	1.3	1.1	3.7
12 : Property (L)	0.9	0.9	1.0
13 : Professional, scientific & technical (M)	4.4	4.3	5.9
14 : Business administration & support services (N)	6.3	5.7	7.5
15 : Public administration & defence (O)	6.5	6.7	6.8
16 : Education (P)	9.4	9.6	8.4
17 : Health (Q)	20.5	18.5	16.4
18 : Arts, entertainment, recreation & other services (R,S,T and U)	4.2	4.5	4.4
All Jobs (100%)	63,414	99,400	2,311,064
% of Jobs That are Full Time	65.0	63.5	67.3
% of Jobs That are Part Time	35.0	36.5	32.7

Source: Business Register and Employment Survey 2010 / NOMIS

There are a number of discontinuities in long term job records which make monitoring difficult, but the table below gives a reasonably consistent comparison during the 5 year period from 2003 to 2008. It shows that there was a significant increase of 20.7% in the number jobs in the IMF Plan area during the 5 year period compared with increases of 15.5% and 4.9% for Highland and Scotland respectively. The nature of the survey-based Annual Business Inquiry means that we should be sceptical about accuracy of these figures at a local level, but the general picture is consistent with the historic population growth, increased participation rates and falling unemployment that we saw during the period, suggesting that there was indeed a significant increase in the number of jobs. There was also a slight increase in the proportion of full time jobs during the period.

	2003			2008			Change 03 to 08
	All Jobs	% Full Time	% Part Time	All Jobs	% Full Time	% Part Time	All Jobs %
IMF Plan Area	57,652	66.2	33.8	69,602	67.5	32.4	20.7
Highland	94,598	64.7	35.3	109,250	66.5	33.5	15.5
Scotland	2,306,994	67.8	32.2	2,420,441	67.8	32.2	4.9

Source: Annual Business Inquiry 2003 & 2008 / NOMIS

The main growth has been in Inverness City but in general there has been a reasonable level of growth throughout the IMF Plan area. The main exceptions to this are significant decrease in Tain (which may be a definitional problem in part) and a small decrease in the number of jobs in Nairn.

## **10.2 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 2010 the average annual wage for all jobs (full and part time) in the UK was £25,553 and in Scotland £24,263 (95.0% of UK), These compare with earnings in Highland of £21,861 (85.6% of UK and 90.1% of Scotland). Note that ASHE does not include the earnings of self-employed people: in the 12 months prior to March 2011, 9.9% of 16 to 64 year olds in Highland were self employed compared with 7.4% in Scotland overall<sup>9</sup> (equivalent figures are not available for the smaller IMF Plan area).

The only estimates of local incomes that are available to us are from the CACI Paycheck figures for household income supplied to us by the Scottish Government for house affordability studies and used above. They show that in 2010 the average household income in the IMF Plan area was £33,789, higher than the Highland average of £32,113 but slightly lower than the Scotland average of £33,907. The map below shows the variation of household income across the IMF Plan area. The city of Inverness shows great variation between the highest incomes – Inverness South, an area dominated by new housing and with a high proportion of households with two working adults – and the lowest incomes in the deprived areas of Inverness Central (see below). Other high income levels are in established commuter areas to Inverness such as the Black Isle and Culloden and Ardersier, with a general trend of incomes falling with increasing distance from Inverness.

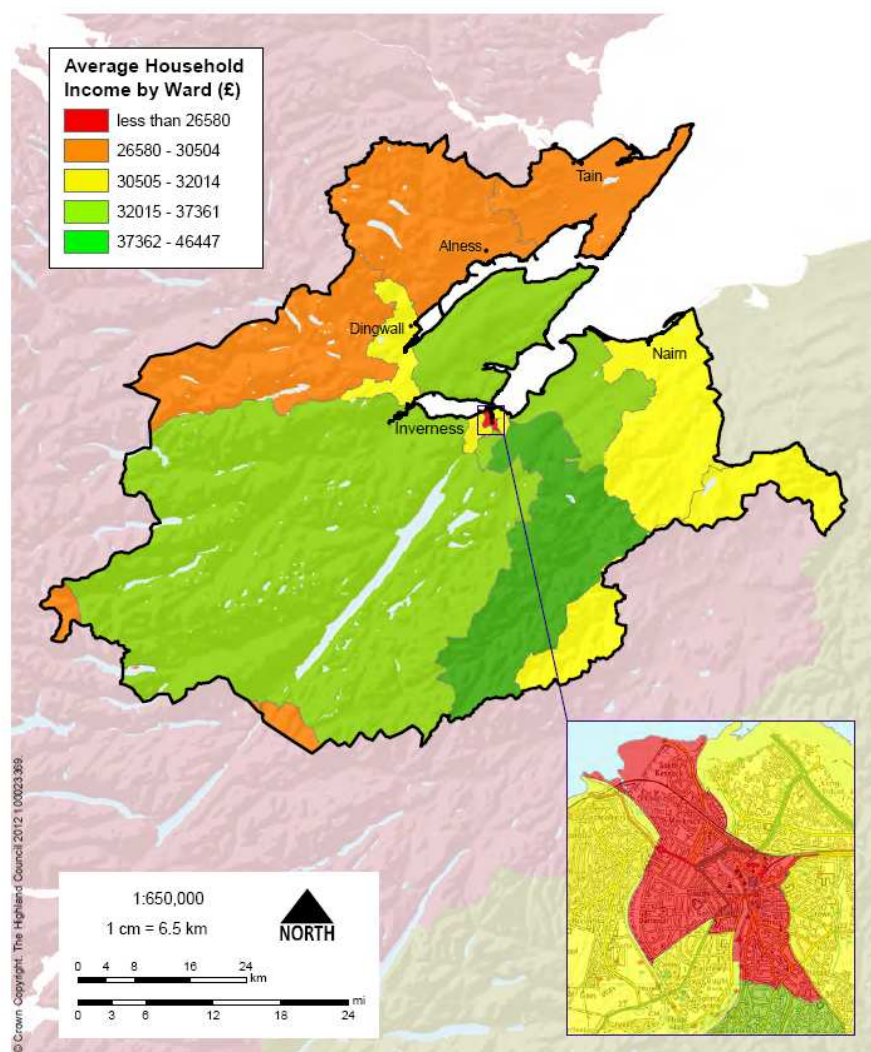
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<sup>9</sup> Annual Population Survey March 2011.

# Inner Moray Firth Local Development Plan

## Average Household Income

based on CACI Paycheck income data 2010



## 10.3 Deprivation

Unemployment, benefit uptake and deprivation are reported in detail on the Highland Council website for both Highland overall<sup>10</sup> and individual wards<sup>11</sup>.

The Scottish Index of Multiple Deprivation 2009 (2010 update) (SIMD09) ranks all datazones in Scotland according to their level of multiple deprivation, based on seven domains<sup>12</sup>, and provides a useful way of summarising unemployment and benefit dependency. Those datazones that are in the most deprived 15% in Scotland (national ranks 1 to 976) are recognised nationally as deprived and are candidates for regeneration funding. 12 datazones in the

<sup>10</sup> <http://www.highland.gov.uk/yourcouncil/highlandfactsandfigures/benefitsandunemployment/>

<sup>11</sup> <http://www.highland.gov.uk/yourcouncil/highlandfactsandfigures/ward-statistics.htm>

<sup>12</sup> income, employment, health, education, housing, crime, geographic access to services

Inner Moray Firth Area are classed as multiply deprived according to SIMD09, as given in the table below.

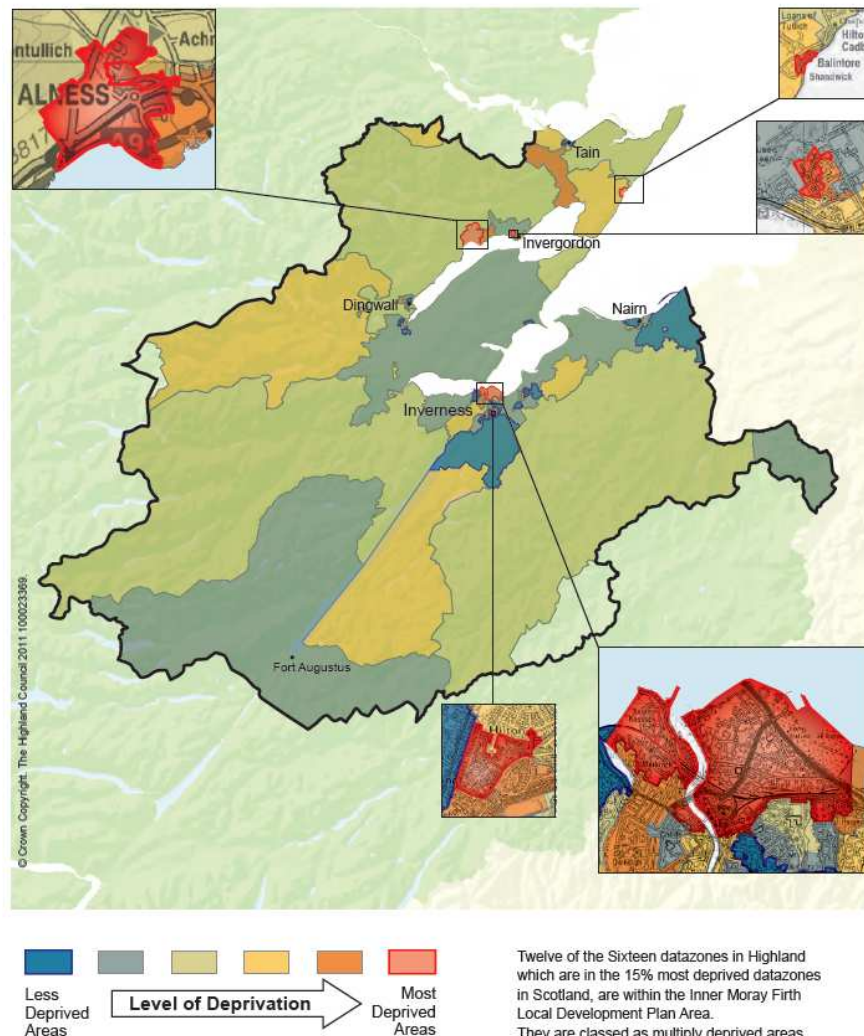
<b>Datazones in Highland Which are Classed as Multiply Deprived According to SIMD09 (2010 update)</b>			
<b>Ward</b>	<b>Data Zone</b>	<b>Data Zone Name</b>	<b>SIMD 2009 Overall Rank in Scotland (1)</b>
Inverness Central	S01003860	Inverness Merkinch North	<b>23</b>
Inverness Central	S01003862	Inverness South Kessock	<b>134</b>
Inverness Central	S01003849	Inverness Merkinch East	<b>205</b>
Cromarty Firth	S01003924	Invergordon Strath Avenue	<b>345</b>
Inverness Central	S01003855	Inverness Merkinch South	<b>447</b>
Cromarty Firth	S01003926	Alness Kirkside	<b>639</b>
Inverness Central	S01003853	Inverness Central & Longman	<b>673</b>
Tain and Easter Ross	S01003937	Seaboard South	<b>722</b>
Inverness Ness-Side	S01003796	Inverness Hilton West	<b>830</b>
Cromarty Firth	S01003922	Alness Teaninich	<b>835</b>
Cromarty Firth	S01003928	Alness Firhill	<b>867</b>
Inverness Central	S01003833	Inverness Central North West	<b>929</b>
<b>(1)</b> Where rank 1 is the most deprived in Scotland, and rank 6,505 is the least deprived Source: Scottish Government; Scottish Index of Multiple Deprivation 2009 (2010 update)			

The map below shows the relative ranking of all datazones in the IMF Plan area, with the twelve deprived datazones described above shown in red.

# Inner Moray Firth Local Development Plan

## Most Deprived Areas

Scottish Index of Multiple Deprivation 2009 (2010 update)



## 11 INFRASTRUCTURE

### 11.1 Transport

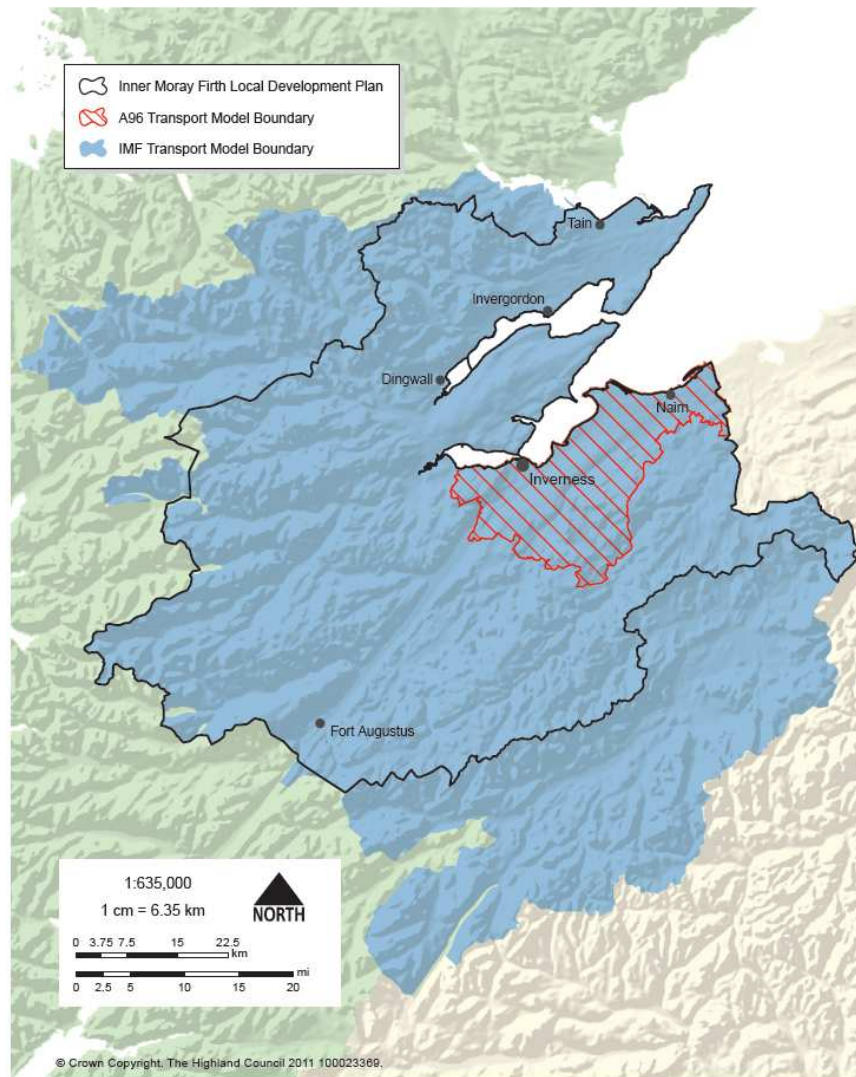
Regular travellers in the IMF Plan area will be aware that the road traffic network is approaching capacity, particularly during peak hours on the main commuter routes into Inverness – the A82 from the south west; the A9 from the north to the Longman roundabout; the A96 from the east to the Millburn roundabout; and from Culloden to Inshes – and on the A96 through Nairn. The Highland Council has worked closely with Transport Scotland since 2009 to update and develop traffic models of the area. There were two phases to this work which are described below, starting with a traffic model of the A96



corridor and then broadening this into a multi-modal model of the wider Inner Moray Firth Area with a boundary which fits well with the IMF Plan area. The model boundaries are shown on the map below:

## Inner Moray Firth Local Development Plan

### Areas Covered by Transport Models



Both models are *strategic* and need to be supplemented by detailed local modelling. Models and analysis of this type are particularly useful in understanding and avoiding the “death by a thousand cuts” in which the cumulative impact of a number of developments, each not particularly significant in itself, can result in critical impact on the transport network.

#### 11.1.1 A96 Transport Model – Description

A report describing the A96 transport model and presenting the results is available at:

[HwLDP background information page](#)



In order to inform the preparation of the HwLDP and particularly to inform development decisions as they relate to the city of Inverness and the A96 corridor, Highland Council, working closely with Transport Scotland, has undertaken an update of the traffic modelling work carried out to inform the original A96 Corridor Development Framework.

The consultant AECOM was commissioned to update and develop an existing 2005 based *VISUM* model of the A96 corridor, and prepare a 2009 based model. The updated model was prepared during the early stages of preparation of the HwLDP and reflected all of the committed development around Inverness and the A96 Corridor at that time. It provided the best available up to date picture of the constraints on the transport network.

In order to guide our future development decisions, the projected development of the major expansion sites contained within the Inverness Local Plan and the A96 Corridor Framework (approved by Highland Council as Supplementary Planning guidance in 2007) were been built into the model to allow a comprehensive assessment of the major improvements required throughout Inverness to accommodate this development.

This work was informed by the latest Highland Council Housing Land Audit, discussions with the development industry on the likely phasing of development and by discussions with Transport Scotland on the likely interventions which could be delivered within the 2011-2021 period.

The report sets out the developments which were considered in this context, a description of the main interventions which are seen as practical and deliverable within this timescale and provides an overview as to the likely scale of development which can be accommodated over this period.

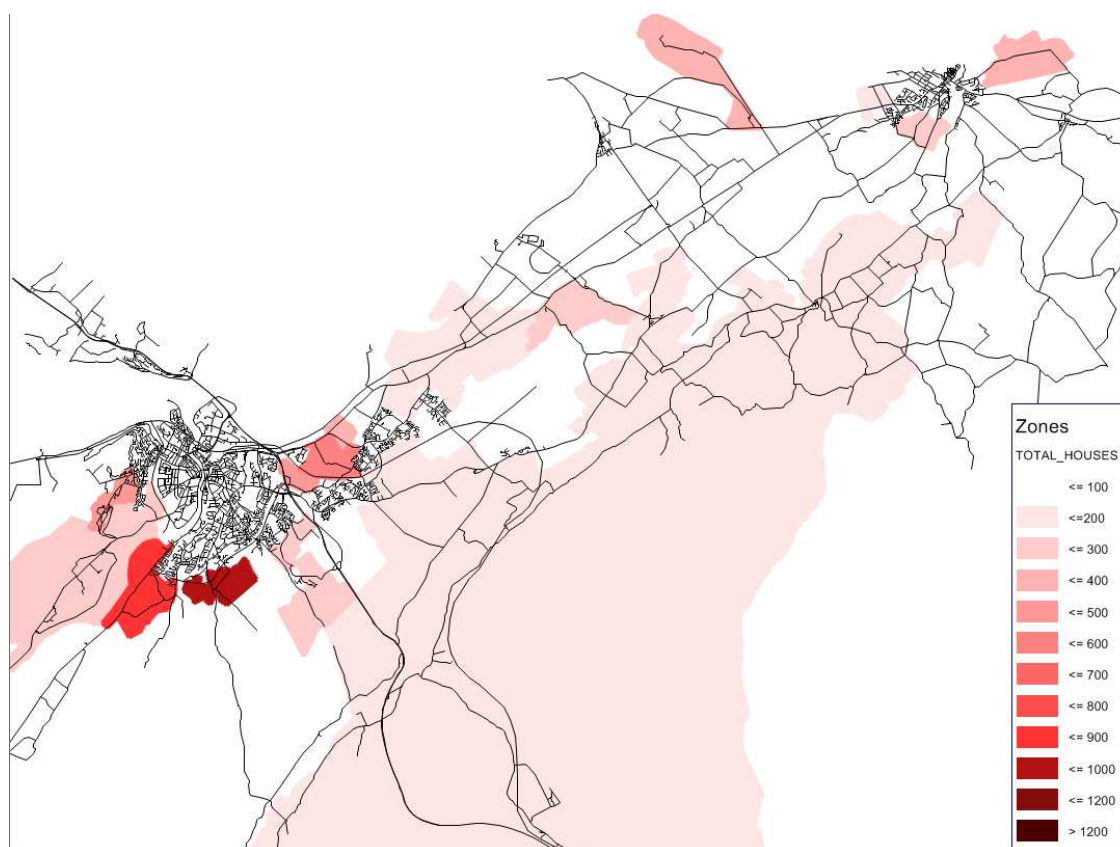
The report was used to inform the content of HwLDP in respect of the interventions which are required to be provided to accommodate development in the short term, and to outline the likely timescale and form of the major improvements required in the medium to long term.

Although the A96 Corridor Framework outlines development over a 30 to 40 year period, the modelling work concentrated on the 2011 to 2021 period to ensure that the HwLDP sets out the most realistic development requirements over this time period, recognising that longer term infrastructure provision in respect of the A96 Trunk Road will be a matter for Transport Scotland and dependent on future spending reviews of Scottish Government.

The map below is intended to give a flavour of the scope and detail of the model and shows the road network modelled together with the anticipated new housing included for the period 2011 to 2021. Large numbers of new houses are shown in dark shades and are the result of:

- Build-out of existing sites at Charleston, Slackbuie, Inshes, Milton of Leys, Westhill and Nairn Lochloy; and

- Construction starting on potential new sites at Ness Castle, East Inverness, Whiteness, Tornagrain, Nairn Sandown / Delnies & Nairn South, Charleston and Ness-Side (the latter two enabled by construction of a river / canal crossing in 2016).



### 11.1.2 A96 Transport Model – Conclusions

An extract from the report giving the conclusions of the study is reproduced verbatim below:

*“This report sets out the results of the traffic modelling work to date. It is the most up to date comprehensive picture of transport issues affecting Inverness, which takes into account all committed development and development which is identified in the Council’s adopted Local Plans and that contained in the A96 Corridor Framework.*

*The results of the modelling work indicates that the development of the city is constrained by limited capacity in areas of the transport network and the need for a number of interventions both between 2011 and 2016 and from 2016 to 2021. The findings support the view that if the interventions can be implemented, the developments proposed both in the Inverness and Nairnshire Local Plans, and the early phases of the A96 Corridor Development Framework, can be progressed through the new Highland wide Local Development Plan. In particular the development phases which have informed the model over the period 2011 to 2021 can be brought forward within the Proposed Plan. This phasing plan will focus most of the*

*development over the 2016-2021 period on the existing allocations of land in Inverness and Nairn itself, with some development of the A96 Corridor sites at east Inverness, Whiteness and Tornagrain. There will of course need to be ongoing reviews of the detailed works required.*

*The key improvements to the 2016 scenario focus on a number of particular points in the network. The development of the Beechwood Campus and other developments around the south of Inverness require immediate improvements to the Inshes roundabout and the A96 slip off the A9 at Culloden road. There is a need to establish a protocol for developers to contribute to these improvements or for in kind improvements to be carried out as part of a mitigation strategy for individual developments.*

*The improvements set out at Longman Roundabout will also potentially offer significant improvements to the strategic network through Inverness in the short term. These improvements could deliver more benefits if they are seen as part of a wider strategy for improving the existing A82 junctions through the city, as envisaged in the Highland Council scenario of the interventions required set out in chapter 3 of this report.*

*The development of the first phase (2011-2016) of East Inverness to the scale envisaged will require substantial investment to the Smithton roundabout and associated local roads. The model has also shown the knock on effects of this development on the roundabout at West Seafield and at Raigmore interchange. Clearly the successful development of East Inverness will involve major front funding by the developers involved to enable this first phase.*

*All of the development in Inverness, the A96 Corridor as well as around Nairn itself clearly demonstrates some impact on the A96 junctions in Nairn. The level of service summary table shows that there is a reduction in the level of service (reference required). Whilst no specific interventions have been modelled in this respect, there is a need to ensure that developments, particularly around the town itself, enables improvements to these junctions in the period up to 2021. It is recommended that further work is undertaken to review performance of the junctions through Nairn at a more detailed level, in association with future development proposals. It is recognised that the Nairn bypass is a strategic transport solution identified in the Strategic Transport Projects Review which is not dependent on development per se, and that the Council will continue to lobby for its early inclusion in a design programme. This will hopefully assist in freeing up some local capacity for further development of phases of development particularly at Nairn South and allow Nairn to regenerate its economy free from passing traffic.*

*Although the main focus of the modelling work has been related to the developments in the A96 Corridor, the western link (river/canal crossing) in Inverness is included as an intervention between 2016 and 2021. Whilst the model does not identify any major improvements to the performance of the network at the strategic level, it can be extrapolated that the delivery of the river crossing will assist in the delivery of local benefits to the south of*

*Inverness in traffic terms, whilst opening up a significant area of housing land in Ness-side and Dores Road as well as providing improved links to leisure and services across the River Ness.*

*The strategic nature of the model does bring with it some limitations. Clearly the opportunities that public transport improvements may bring are not part of these modelled scenarios. These improvements could include the park and ride site proposed as part of the East Inverness phase 1 development or general improvements to the pedestrian and cyclist networks throughout the city and improved priority links for buses.*

*The current modelling has identified problem junctions where future development will lead to increased congestion and interventions have been trialled in the model to address these issues. However, the VISUM model by its nature is a coarse model with generic treatment of nodes, but provides a good indication of trends pointing towards indicative interventions requiring more detailed design. As a result of this it appears from the analysis done to date that some proposed Interventions are not fully effective in addressing the congestion issues. It is therefore recommended that the output from the VISUM model be used in the areas of Inshes, Ness-side/Torvean and the A82 Longman/Friars Bridge and worked up into VISSIM micro-simulation models to guide the detail of the most efficient future transport layouts.”*

### **11.1.3 Inner Moray Firth Transport Model (the IMF model)**

The conclusions of the A96 model study note some limitations of the model. It is also geographically limited and cannot handle key areas such as traffic build up on the A9 to the north of Inverness or growth that might arise from major redevelopment of the Nigg fabrication yard. The extended model covering the entire IMF Plan in 384 model zones overcomes these limitations, as well as benefiting from being produced later in the HwLDP development process, and including future housing developments given in the proposed Plan. The IMF model is a complex technical model and a full description would be too lengthy for this document. The main planning features are:

- The model was calibrated using the results of traffic counts and road side interviews in late 2009, and the road network and bus & train timetables and passenger numbers at that time.
- Planning data is an input to the model which uses the current and expected numbers of houses and jobs and the population broken down by gender, age and economic activity.
- The 2009 calibrated model was updated to a base year of 2011 by including current known and committed developments.
- For each of four future five year periods (starting with the period mid 2011 to mid 2016) a future housing development profile was developed which delivered the requirement given in our HNDA, on Plan and windfall sites as envisaged in the developing HwLDP. The population living in existing housing was adjusted for falling occupancy rates and major new developments were given a representative population profile.
- In a similar parallel process, new jobs were created on key development sites (eg Nigg, the Campus and IABP) and on a windfall basis across the

IMF Plan area. The number of new jobs created was controlled to be consistent with the expected population growth: a common problem with the planning data in models of this type is that the expected numbers of houses / people / jobs are not in balance, creating extra commuting in or out of the model area.

#### **11.1.4 Using the Transport Models**

Both models can be used as a platform for evaluating the impact of future developments. At the time of preparing this report (June 2011) the A96 model is hosted by AECOM who will run the model for developers on a consultancy basis. It is anticipated that the IMF model will become available on the same basis in the near future.

### **11.2 Education**

After two decades of declining birth numbers in throughout Highland, the number of births per year in Highland reached a low point in 2002 before beginning to increase again. Within the IMF Plan area, births per year increased steadily from 1,239 in 2002 to 1,605 in 2008 before falling slightly to 1,503 in 2009. This increase has been feeding through the education system with increasing rolls in nursery and primary schools, and is also about to result in an increase in secondary school rolls. In parts of the Plan area – in particular the expansion areas of Inverness – new house building has added further to roll pressures with the result that a number of schools will exceed capacity during the next decade. This has also been accompanied by an ageing of the population in some areas that have not seen new house building leading to some under-utilised schools. The net result is that there are parts of the IMF Plan area where there is a mis-match between rolls and capacity.

At the meeting on 16<sup>th</sup> December 2010 the Highland Council agreed<sup>13</sup> to carry out a Highland-wide strategic review of our school estate aimed at giving our children the best possible education with an infrastructure that is sustainable and fit for purpose. At the time of writing this report we are in the early stages of a review of the Alness, Invergordon and Tain associated school groups (ASGs), with the remaining ASGs in the IMF plan area likely to be reviewed during the life of the IMF Plan.

School roll forecasts are an important part of managing education provision and the school estate. Baseline school roll forecasts are available on our website<sup>14</sup> and have been used as the basis for the discussion below. The term *baseline* is used because they include an allowance for additional pupils likely arise from new house building on windfall and allocated local plan sites, but

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<sup>13</sup>

<http://www.highland.gov.uk/yourcouncil/committees/previouscommitteemeetings/thehighlandcouncil/2010-12-16-hc-min.htm>

<sup>14</sup> <http://www.highland.gov.uk/yourcouncil/highlandfactsandfigures/schoolrollforecasts.htm>

not the strategic new developments along the A96 corridor given conditional support in the HwLDP.

### 11.2.1 Nursery Education

Nursery education in the IMF Plan area is provided by 62 Council and 44 partner nurseries. Forecasts of future numbers of nursery pupils are an essential part of the school roll forecasting process, but the numbers of pupils attending specific nurseries are difficult to forecast because parents often choose a nursery to suit their family circumstances rather than the one at their local school. Three intake dates per year are an added complication.

The combination of rising birth rates and concentrations of new house building has resulted in roll pressures in nurseries. In April 2011, 21 Council and 2 partner nurseries were operating at greater than 80% of capacity, and 12 Council nurseries were at (or slightly above) capacity for many sessions. The Council run nurseries under particular pressure are:

Bridgend
Craighill
Beaully
Cauldeen
Central
Dalneigh
Duncan Forbes
Hilton
Merkinch Nursery
Raigmore
Smithton
Auldearn

Nursery accommodation and staff are actively managed by our Early Years team on a term to term basis in order to match pupils to places, but despite this many parents are now unable to use their nursery of choice. Nursery provision has not, traditionally, been subject to developer contributions. However, it is now a statutory requirement that the Council must fund provision. There is a case that our supplementary guidance *Education and New Residential Development* should be revised to include a contribution towards nurseries where they are particularly stretched.

### 11.2.2 Primary Education

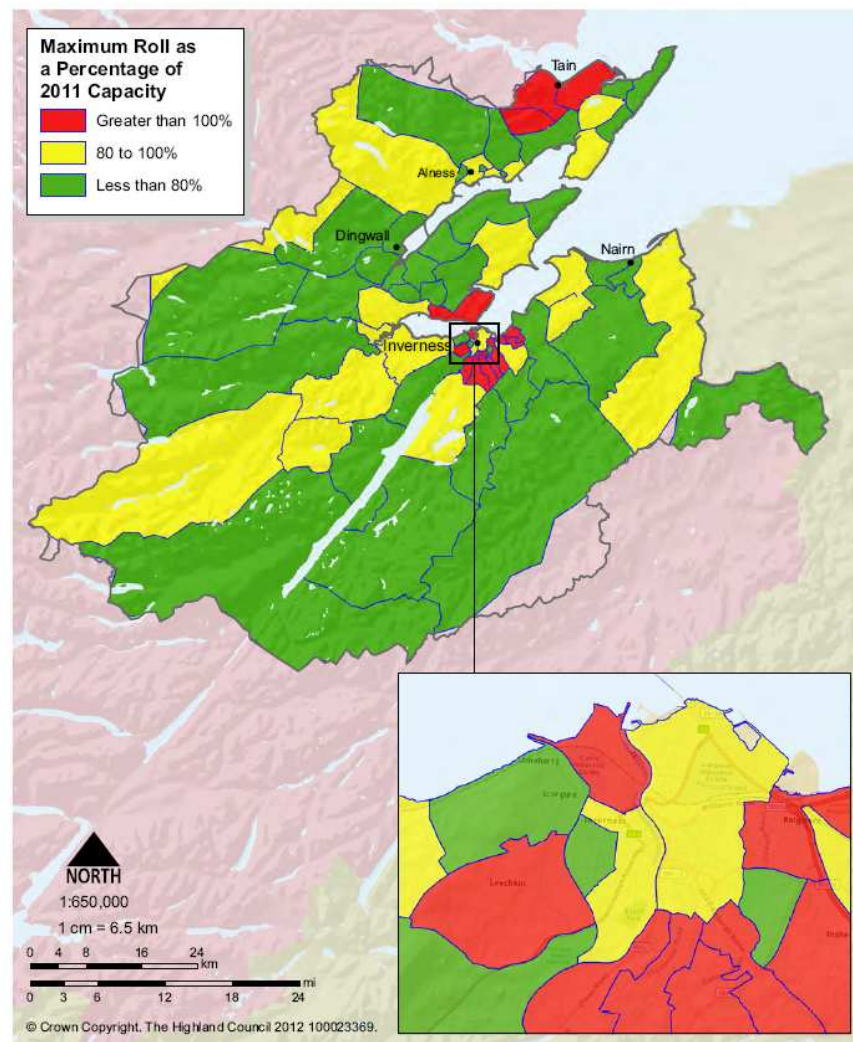
There are 73 primary schools serving the IMF Plan area, ranging in size from the largest primary school in Highland at Dingwall with a roll of 424 pupils to small rural primaries such as Foyers and Strathconon, with rolls of 11 and 14 pupils respectively. As described above, many primary schools have been experiencing increasing rolls since 2006 with the result that 14 schools are expected to exceed capacity during the next decade, with a further 20 at



between 80% and 100% of capacity. However, five will have a roll of less than 50% of capacity throughout the period.

The map below shows the roll status of primaries in the IMF Plan area over the next decade, with full details in Table 8 of the Appendix.

### **Inner Moray Firth Local Development Plan** *Primary Schools Maximum Rolls* 2011/12 to 2021/22



#### **11.2.3 Secondary Education**

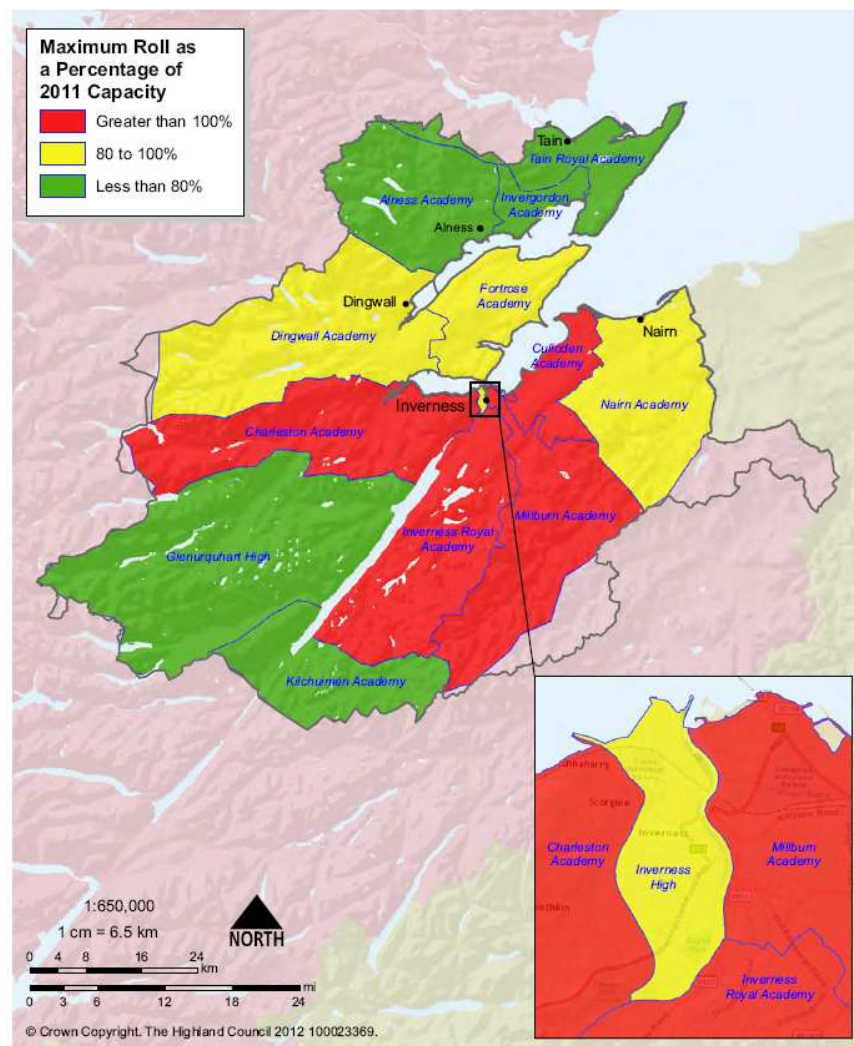
There are 13 secondary schools in the IMF plan area, including three schools with a roll of over 1,000 pupils (Culloden, Dingwall and Millburn Academies) and the second smallest secondary in Highland at the 76 pupil Kilchuimen Academy. Four schools are expected to exceed capacity during the next decade and 4 will be at between 80% and 100% of capacity.

The map below shows the roll status of secondaries in the IMF Plan area over the next decade, with full details in Table 9 of the Appendix. The map shows that four out of the five Secondaries in Inverness City are expected to exceed capacity within the next decade, with the most critical Millburn Academy and Inverness Royal Academy (rolls forecast to exceed capacity in 2014/15 and 2017/18 respectively). The Council's capital programme makes provision for investment at Inverness Royal Academy (IRA) beginning in 2013/14 which, alongside potential management options such as re-zoning, could accommodate the surplus from both Millburn and IRA. Options for expansion are being examined at Culloden Academy where the site is tight and options are limited, and the position at Charleston Academy is heavily dependent on the rate of house building in the area which is being monitored.

## Inner Moray Firth Local Development Plan

### *Secondary Schools Maximum Rolls*

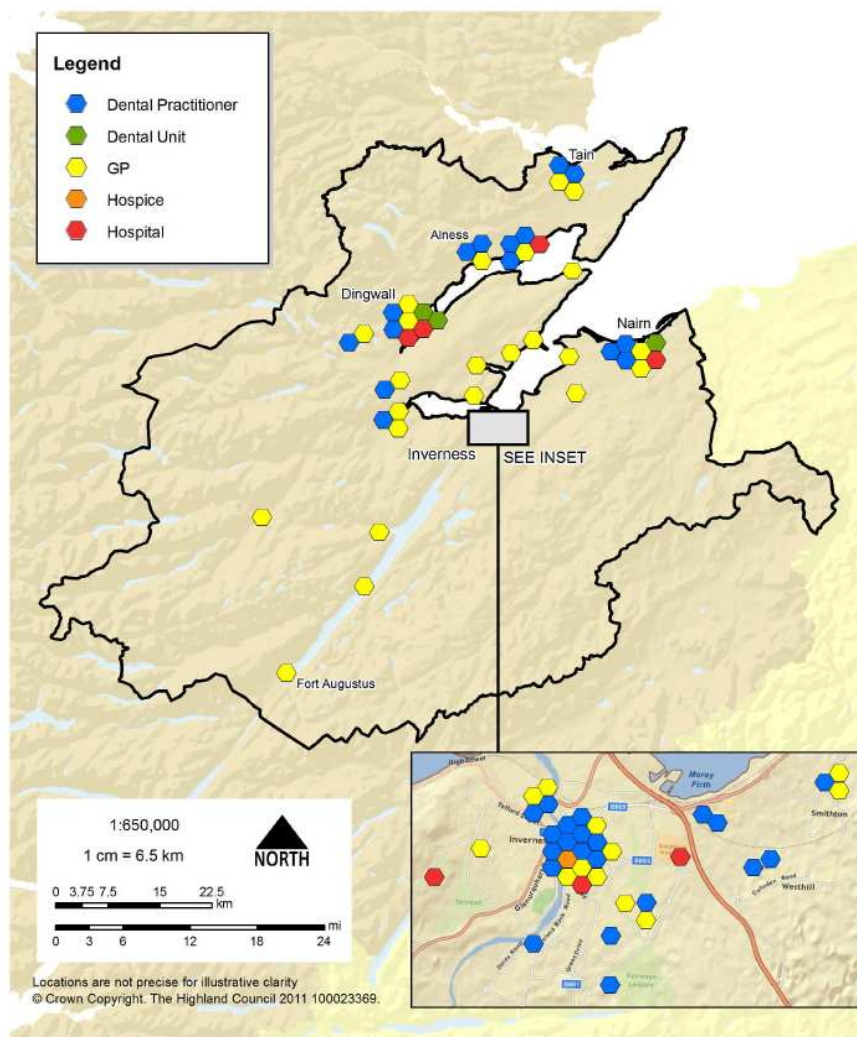
2011/12 to 2021/22



## 11.3 Health

The map below shows the distribution of health facilities in the IMF Plan area and the centralization mainly in the urban areas. Hospital and specialist dental services are provided exclusively in the towns of Invergordon, Inverness and Nairn with dental practitioners in the other towns, and rural areas served only by the odd GP surgery

### Inner Moray Firth Local Development Plan *Health Services*



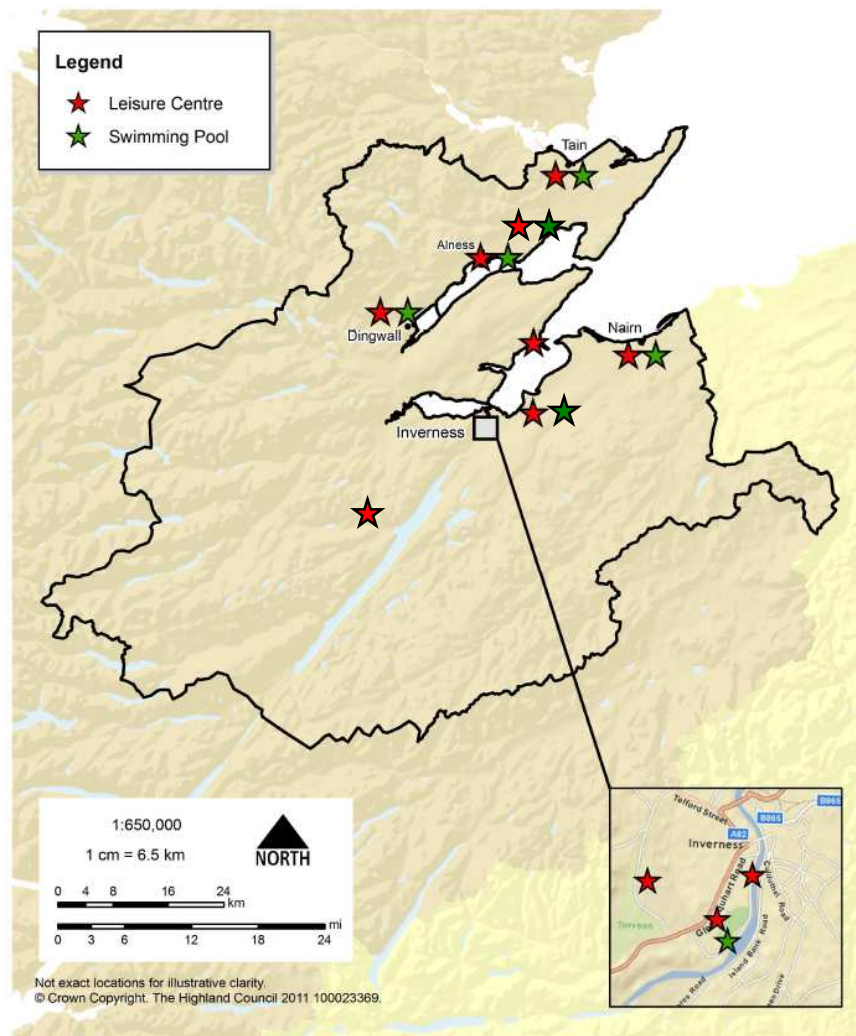
## 11.4 Leisure

Public leisure facilities are situated in the main towns with leisure centres and swimming pools in Inverness (where Bught park hosts a variety of sports and activities including athletics, football, shinty, rugby, American football and ice skating) and dry leisure centres in Fortrose and Drumnadrochit.



## Inner Moray Firth Local Development Plan

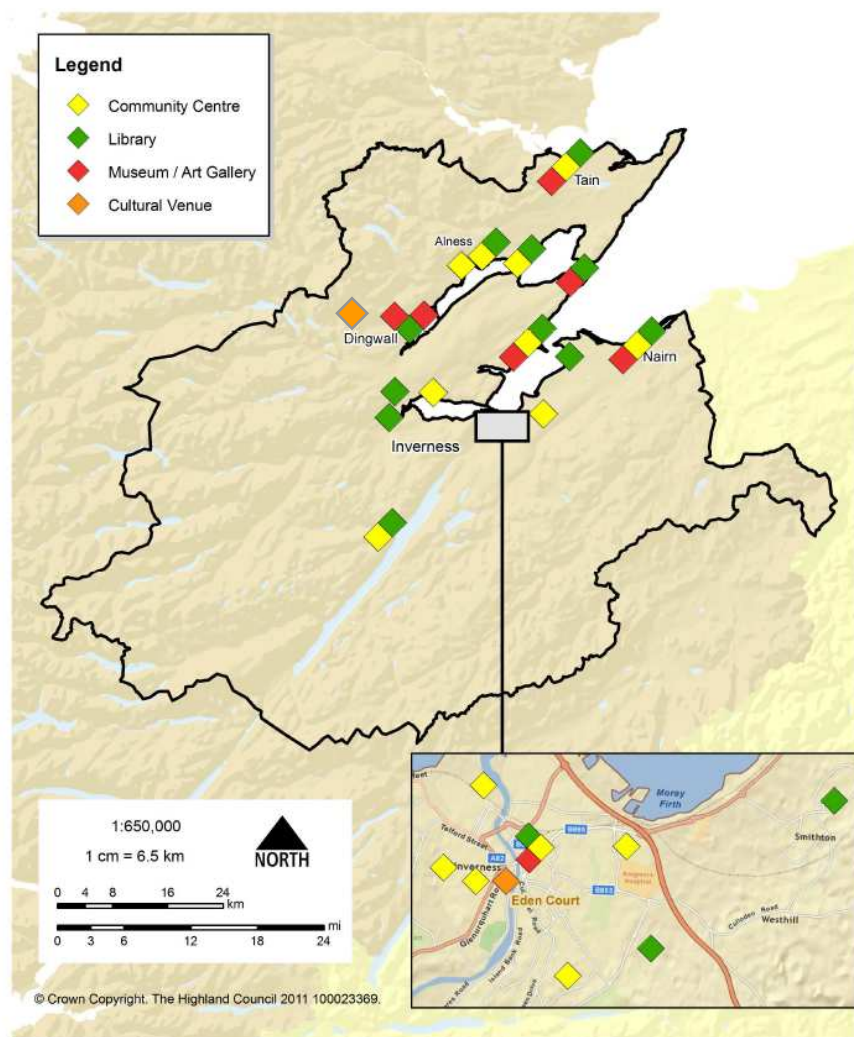
### Main Sports Facilities



## 11.5 Community & Culture

As with the other facilities, community and cultural facilities tend to be concentrated in the larger towns although many village halls

## Inner Moray Firth Local Development Plan *Community and Cultural Facilities*



## 12 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 them as “robust and credible”, meaning that it gives a reliable guide to amount of housing land that we need to make available to help achieve Government’s economic growth aspirations. Our HNDA is available at:

[Housing Need and Demand Assessment](#)

The full document is the HNDA that underpins the IMF Local Plan and this remains the definitive document. Extracts for the IMF area are given below. Figures for the two IMF plan areas that are parts of housing market areas have been factored from the larger HMA pro-rata to the number of houses (which also acts as a proxy for population). In the case of West Ross, the part that lies in the IMF plan area is close to urban areas and subject to commuter pressure, but the socio-economic profile has been compared with that for West Ross overall (eg see the origins of house buyers and incomes above) and found to be similar. The simple pro-rata approach is therefore believed to be valid in this case.

## 12.1 Population Projections

The population projections are based on the 2006 series of projections, for the high migration scenario in which an average of 1,600 people move into Highland each year, similar to the rates of inward migration seen between 2001 and 2009. This equates to around 850 people per year moving into the IMF plan area. The table below shows that under this scenario the population is expected to increase by 11,934 (9%) between 2011 and 2021 with the greatest percentage growth in Inverness and the lowest in East Ross.

<b>Projected Populations for Housing Market Areas in the IMF Area</b>				
<b>Housing market Area</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>	<b>2031</b>
<b>Badenoch &amp; Strathspey (part)</b>	128	134	140	150
<b>Inverness</b>	74,662	78,760	82,696	90,084
<b>Nairn</b>	12,631	13,209	13,768	14,652
<b>East Ross</b>	21,153	21,821	22,405	23,209
<b>Mid Ross</b>	22,605	23,335	23,962	24,966
<b>West Ross (part)</b>	1,825	1,898	1,967	2,070
<b>IMF</b>	133,004	139,157	144,938	155,132
Source: Highland Council 2006 Series Population Projections, high migration scenario				

The tables below shows that over the next decade the population is expected to age significantly with a marginal decline in the 16 to 49 age group and significant percentage changes in all older age groups with the greatest increase in the number of over 85s (a 52% increase).

<b>Projected IMF Population by Age Band 2011 to 2031</b>				
<b>Age band</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>	<b>2031</b>
<b>0 to 15</b>	23,703	24,140	24,607	24,821
<b>16 to 49</b>	56,248	55,586	55,157	57,412
<b>50 to 64</b>	28,879	30,616	31,930	30,384
<b>65 to 74</b>	13,178	15,966	17,778	20,238
<b>75 to 84</b>	7,903	9,031	10,757	14,771
<b>85+</b>	3,093	3,820	4,710	7,506
<b>All Ages</b>	133,004	139,157	144,938	155,132
Source: Highland Council 2006 Series Population Projections, high migration scenario				



<b>Projected Change in IMF Population by Age Band 2011 to 2031 as a percentage of the 2011 population</b>			
	<b>2011 to 2016</b>	<b>2011 to 2021</b>	<b>2011 to 2031</b>
<b>0 to 15</b>	1.8	3.8	4.7
<b>16 to 49</b>	-1.2	-1.9	2.1
<b>50 to 64</b>	6.0	10.6	5.2
<b>65 to 74</b>	21.2	34.9	53.6
<b>75 to 84</b>	14.3	36.1	86.9
<b>85+</b>	23.5	52.3	142.7
<b>All Ages</b>	4.6	9.0	16.6
Source: Highland Council 2006 Series Population Projections, high migration scenario			

## 12.2 Future Housing Requirement

Additional new houses will be required to meet the demand from a combination of increasing population and smaller household sizes (see later). The table below shows that 6,298 houses will be required during the first five years of the plan period and 5,812 during the second period, more than half of these in the Inverness housing market area.

	<b>New Housing Requirement by Housing Market Area (no additions for flexibility / market choice)</b>			
<b>Housing Market Area</b>	<b>2011-2015</b>	<b>2016-2020</b>	<b>2021-2025</b>	<b>2026-2030</b>
<b>Badenoch &amp; Strathspey (part – 1)</b>	6	6	5	5
<b>Inverness</b>	3,781	3,561	2,666	2,666
<b>Nairn</b>	652	598	375	375
<b>East Ross</b>	885	776	482	482
<b>Mid Ross</b>	898	803	562	562
<b>West Ross (part – 1)</b>	75	68	44	44
<b>IMF</b>	6,298	5,812	4,134	4,134
1) part wards pro rata to existing stock				
Source: Highland Council Housing Need and Demand Assessment 2009				

## 12.3 Future Housing Land Requirement

The table above refers to the number of new houses required, and to provide these we need to ensure that there is an adequate supply of housing land. In order to give developers choice and allow for uncertainties in the location of demand, a 25% flexibility allowance is added to the number of houses to give the housing land requirement in the table below.

	<b>New Housing Land Requirement (housing requirement plus 25% for flexibility / market choice)</b>			
<b>Housing Market Area</b>	<b>2011-2015</b>	<b>2016-2020</b>	<b>2021-2025</b>	<b>2026-2030</b>
<b>Badenoch &amp; Strathspey (part - 1)</b>	8	7	6	6
<b>Inverness</b>	4,727	4,451	3,332	3,332
<b>Nairn</b>	815	747	469	469
<b>East Ross</b>	1,107	971	603	603
<b>Mid Ross</b>	1,122	1,004	702	702
<b>West Ross (part – 1)</b>	94	85	56	56
<b>IMF</b>	7,872	7,265	5,168	5,168
1) part wards pro rata to existing stock Source: Highland Council Housing Need and Demand Assessment 2009				

## 12.4 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. These trends would generate a significant requirement for new housing even without the population growth which is expected. The table 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 (28.5% and 26.1% respectively).

This points 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.

<b>Estimated 2011 and Projected 2021 Households and Household Composition for the IMF Plan area</b>				
<b>Household Type</b>		<b>2011</b>	<b>2021</b>	<b>% Change</b>
<b>1 person</b>	<b>male</b>	9,525	12,241	28.5
<b>1 person</b>	<b>female</b>	11,648	14,691	26.1
<b>2 person</b>	<b>2 adult</b>	20,300	24,417	20.3
<b>2 person</b>	<b>1 parent</b>	1,943	2,429	25.0
<b>3+ person</b>	<b>all adult</b>	4,025	3,454	-14.2
<b>3+ person</b>	<b>1 parent</b>	1,640	1,986	21.1
<b>3+ person</b>	<b>2 adults + children</b>	10,675	9,240	-13.4
<b>Total Households</b>		59,757	68,458	14.6
Source: Highland Council 2006 based household projections, high migration scenario, using GROS headship rates				

## **APPENDIX**

### **DETAILED TABLES**

**Table 1: Housing Stock by Settlement Development Areas  
Inner Moray Firth Local Plan Area, Housing Stock  
by Settlement Development Area, 2011**

<b>Settlement Development Area</b>	<b>All Properties</b>	<b>Affordable Housing - Housing Association</b>	<b>Affordable Housing - Highland Council</b>	<b>HMOs (Number of Licensed Occupants)</b>	<b>Private Rented Properties</b>
<b>Outwith SDAs</b>	8,609	6	24	2 (29)	1,302
Abriachan	33				2
Achterneed	15				4
Alcaig	21		2		
Alness	2,589	96	973	7 (38)	92
Alness point	10				
Arabella	31				2
Ardersier	490	39	137		23
Ardross	4				
Ardross Mains Steading	2				
Auldearn	277	31	37		14
Avoch	496	14	65		33
Balblair	24		5		
Balnain	34				3
Barbaraville	109				3
Beaully	710	11	118	1	65
Blairninich	59				11
Brackla	12				11
Bunchrew	68				4
Cannich	94		8		8
Cawdor	52				23
Clephanton	21		1		7
Conon Bridge	731	38	161		23
Contin	134		15		10
Croachy	19				2
Croftnacreich	20				
Cromarty	365		86		22
Cromarty Mains	15				3
Croy	200	5	45		12
Cuillich	3				
Culbokie	252		5		8
Culcharry	20				
Culloden Moor	154				1
Dalchreichart	28				
Davidston	12				1
Daviot	11				
Dingwall	2,567	123	493	7 (86)	224
Dochgarroch	16				19
Dores	65	10	2		4
Drumnadrochit	572	23	56		44
Easter Kinkell	32				
Evanton	632	48	70		30
Fearn	16				
Fendom	15				2

<b>Settlement Development Area</b>	<b>All Properties</b>	<b>Affordable Housing - Housing Association</b>	<b>Affordable Housing - Highland Council</b>	<b>HMOs (Number of Licensed Occupants)</b>	<b>Private Rented Properties</b>
Ferness	9				
Fort Augustus	356	17	49		31
Fortrose	670	6	44		38
Foyers	110	11	8		7
Garve	43		12	1 (10)	1
Gorstan	7				
Gorston	6				
Gorthleck	16				
Hill of Fearn	158		34		8
Hilton of Cadboll	1				
Inchmore	43				1
Inver	105		10		2
Invergordon	1,851	384	296		105
Invermoriston	59		2		5
Inverness Airport	15				
Inverness City	28,438	1,630	3,507	150 (883)	2,936
Jemimaville	34		2		
Kilcoy	12				4
Kildary	55		8		4
Killen	17		2		3
Kiltarlity	141	18	37		7
Kirkhill	300	19	20		5
Littlemill	8				1
Lochend	25		7		
Lochside	31				1
Marybank	84		11		4
Maryburgh	503	17	44		22
Milton of Kildary	247	94	54		5
Milton-Redcastle	16				9
Mounthigh	14				1
Muir of Ord	1,141	79	176	1 (10)	45
Munlochy	194	12	28		13
Nairn	4,431	259	595	7 (74)	335
Newhall	10				
Newton of Kinkell	14				
Nigg	10		5		
Nigg Point	9				
North Kessock	438	13	36		20
Piperhill	52		11		
Portmahomack	236		13		7
Raddery	9				
Rhicullen/Newmore	21				
Rockfield	18				
Rosehaugh Estate	9				14
Rosemarkie	302	9	34	1 (7)	16
Scotsburn	56				
Seaboard Villages	548		193		14
Stratherrick (Errogie)	16				2

<b>Settlement Development Area</b>	<b>All Properties</b>	<b>Affordable Housing - Housing Association</b>	<b>Affordable Housing - Highland Council</b>	<b>HMOs (Number of Licensed Occupants)</b>	<b>Private Rented Properties</b>
<b>Strathnairn (Broomhill/Croftcroy)</b>	30				
<b>Strathnairn (Farr)</b>	11		1		1
<b>Strathnairn (Inverarnie)</b>	39	6			
<b>Strathpeffer</b>	451	32	67	2 (42)	29
<b>Struy</b>	15				6
<b>Tain</b>	1,721	173	295		94
<b>Tomatin</b>	125		15		33
<b>Tomich</b>	33				3
<b>Tore</b>	63		2		4
<b>Tornagrain</b>	17		5		6
<b>Windhill</b>	16				2
<b>IMF</b>	63,048	3,223	7,926	178 (1,179)	5,856
Source: Highland Council Records					



**Table 2: Housing Stock by Settlement Zone  
Inner Moray Firth Local Plan Area, Housing Stock  
by Settlement Zone, 2011**

<b>Settlement Zone</b>	<b>All Properties</b>	<b>Affordable Housing - Housing Association</b>	<b>Affordable Housing - Highland Council</b>	<b>HMOs (Number of Licensed Occupants)</b>	<b>Private Rented Properties</b>
<b>Alness</b>	2,612	96	973	7 (38)	105
<b>Ardersier</b>	675	39	137		63
<b>Ardross</b>	191		2		19
<b>Auldearn</b>	534	33	38		67
<b>Avoch</b>	558	14	65		61
<b>Balblair</b>	222		7		13
<b>Balnain</b>	224				11
<b>Beaully</b>	897	11	118		83
<b>Bunchrew</b>	234				20
<b>Cannich</b>	243		8		31
<b>Cawdor</b>	458		20		116
<b>Conon Bridge</b>	863	38	161		40
<b>Contin</b>	234	1	15		25
<b>Croachy</b>	76				10
<b>Cromarty</b>	446		86		38
<b>Croy</b>	254	1	45	1 (15)	27
<b>Culbokie</b>	461		6		35
<b>Culloden</b>	5,909	244	384	5 (21)	609
<b>Culloden Moor</b>	283				26
<b>Dalcross</b>	159	4	5		34
<b>Daviot</b>	155	1			13
<b>Dingwall</b>	2,716	123	493	7 (86)	259
<b>Dores</b>	142	10	2		39
<b>Drumnadrochit</b>	775	23	56		55
<b>Dundreggan</b>	80				5
<b>Evanton</b>	774	48	70		82
<b>Farr</b>	151	6	1		10
<b>Fearn</b>	217		34		20
<b>Ferness</b>	107				36
<b>Fort Augustus</b>	431	17	49		47
<b>Fortrose</b>	1,102	16	78	1 (7)	60
<b>Foyers</b>	217	11	8		15
<b>Garve</b>	75		12	1 (10)	7
<b>Grantown</b>	72				21
<b>Inver</b>	206		10		19
<b>Invergordon</b>	1,961	384	296		110
<b>Invermoriston</b>	95		2		7
<b>Inverness</b>	22,729	1,386	3,123	146 (876)	2,372
<b>Kilcoy</b>	151		2		23
<b>Kildary</b>	729	95	62		42
<b>Killen</b>	58		2		3
<b>Kiltarlity</b>	581	18	37		60
<b>Kinkell</b>	133		2		4

<b>Settlement Zone</b>	<b>All Properties</b>	<b>Affordable Housing - Housing Association</b>	<b>Affordable Housing - Highland Council</b>	<b>HMOs (Number of Licensed Occupants)</b>	<b>Private Rented Properties</b>
<b>Kirkhill</b>	448	19	20		39
<b>Lochend</b>	148		7		36
<b>Marybank</b>	168		11		28
<b>Maryburgh</b>	567	17	44		42
<b>Moniack</b>	148				7
<b>Moy</b>	55				10
<b>Muir Of Ord</b>	1,575	79	176	1 (10)	103
<b>Munlochy</b>	371	12	28		45
<b>Nairn</b>	4,792	259	596	7 (74)	374
<b>Newmore</b>	125				11
<b>Nigg</b>	90		5		4
<b>North Kessock</b>	686	13	36		40
<b>Portmahomack</b>	347		15		21
<b>Resolis</b>	150				15
<b>Scotsburn</b>	57				
<b>Seaboard</b>	706		197		44
<b>Strathconon</b>	94				19
<b>Stratherrick</b>	185		2		27
<b>Strathpeffer</b>	705	32	67	2 (42)	48
<b>Struy</b>	194				24
<b>Tain</b>	1,919	173	295		111
<b>Tomatin</b>	216		15		58
<b>Tore</b>	106		3		8
<b>Outwith Settlement Zone</b>	6				
<b>IMF</b>	63,048	3,223	7,926	178 (1,179)	5,856
Source: Highland Council Records					

**Table 3: House Completions by Settlement Zone**  
**House Completions Jan 2000 to Dec 2010**  
**Completions Outwith Settlement Development Areas and Allocated Sites**

<b>Settlement Zone</b>	<b>Completions Within Allocated Sites</b>	<b>Completions Outwith Allocated Sites</b>	<b>All Completions Within SDAs</b>
<b>Alness</b>	211	121	332
<b>Ardersier</b>	36	0	36
<b>Ardross</b>	2	2	4
<b>Auldearn</b>	25	16	41
<b>Avoch</b>	65	4	69
<b>Balblair</b>	6	0	6
<b>Balnain</b>	4	0	4
<b>Beauly</b>	43	86	129
<b>Cannich</b>	16	1	17
<b>Cawdor</b>	10	0	10
<b>Conon Bridge</b>	107	0	107
<b>Contin</b>	7	2	9
<b>Croachy</b>	2	0	2
<b>Cromarty</b>	14	6	20
<b>Croy</b>	5	3	8
<b>Culbokie</b>	99	4	103
<b>Culloden</b>	633	584	1,217
<b>Culloden Moor</b>	28	0	28
<b>Dalcross</b>	0	40	40
<b>Daviot</b>	2	0	2
<b>Dingwall</b>	151	95	246
<b>Dores</b>	6	12	18
<b>Drumnadrochit</b>	155	10	165
<b>Dundreggan</b>	4	0	4
<b>Evanton</b>	37	18	55
<b>Farr</b>	27	1	28
<b>Fearn</b>	24	3	27
<b>Fort Augustus</b>	111	5	116
<b>Fortrose</b>	86	21	107
<b>Foyers</b>	9	0	9
<b>Garve</b>	3	0	3
<b>Inver</b>	6	0	6
<b>Invergordon</b>	93	52	145
<b>Invermoriston</b>	9	0	9
<b>Inverness</b>	1,789	1,650	3,439
<b>Kilcoy</b>	1	0	1
<b>Kildary</b>	15	52	67
<b>Killen</b>	1	0	1
<b>Kiltarlity</b>	6	18	24
<b>Kinkell</b>	9	0	9
<b>Kirkhill</b>	44	33	77
<b>Lochend</b>	6	0	6

<b>Settlement Zone</b>	<b>Completions Within Allocated Sites</b>	<b>Completions Outwith Allocated Sites</b>	<b>All Completions Within SDAs</b>
<b>Marybank</b>	8	0	8
<b>Maryburgh</b>	33	0	33
<b>Muir Of Ord</b>	158	189	347
<b>Munlochy</b>	9	40	49
<b>Nairn</b>	338	371	709
<b>Newmore</b>	3	0	3
<b>North Kessock</b>	20	21	41
<b>Portmahomack</b>	11	36	47
<b>Scotsburn</b>	5	0	5
<b>Seaboard</b>	12	6	18
<b>Stratherrick</b>	3	0	3
<b>Strathpeffer</b>	30	34	64
<b>Tain</b>	78	46	124
<b>Tomatin</b>	28	0	28
<b>Tore</b>	10	0	10
<b>All Completions Within SDAs</b>	4,653	3,582	8,235

**Table 4: House Completions Outwith Settlement Development Areas  
January 2000 to December 2010**

<b>Settlement Zone</b>	<b>Completions Outwith Hinterland</b>	<b>Completions Within Inverness Hinterland</b>	<b>Completions Within Nairn Hinterland</b>	<b>Completions Within RACE Hinterland</b>	<b>Total Hinterland Completions</b>
<b>Alness</b>				7	7
<b>Ardersier</b>		17			17
<b>Ardross</b>	12			7	7
<b>Auldearn</b>			34		34
<b>Avoch</b>				4	4
<b>Balblair</b>				10	10
<b>Balnain</b>	32				0
<b>Beauly</b>		32			32
<b>Bunchrew</b>		32			32
<b>Cannich</b>	16				0
<b>Cawdor</b>			23		23
<b>Conon Bridge</b>	1			12	12
<b>Contin</b>	4			8	8
<b>Croachy</b>	3				0
<b>Cromarty</b>				1	1
<b>Croy</b>		17			17
<b>Culbokie</b>				23	23
<b>Culloden</b>		19			19
<b>Culloden Moor</b>		12			12
<b>Dalcross</b>		9			9
<b>Daviot</b>		49			49
<b>Dingwall</b>				15	15
<b>Dores</b>		16			16
<b>Drumnadrochit</b>	20	29			29
<b>Dundreggan</b>	10				0
<b>Evanton</b>	2			16	16
<b>Farr</b>		13			13
<b>Fearn</b>	4				0
<b>Ferness</b>	16				0
<b>Fort Augustus</b>	15				0
<b>Fortrose</b>				18	18
<b>Foyers</b>	9	2			2
<b>Garve</b>	2				0
<b>Grantown</b>	3				0
<b>Inver</b>	13				0
<b>Invergordon</b>				6	6
<b>Invermoriston</b>	1				0
<b>Inverness</b>		49			49
<b>Kilcoy</b>				12	12
<b>Kildary</b>	8			17	17
<b>Killen</b>				4	4
<b>Kiltarlity</b>	5	61			61
<b>Kinkell</b>				3	3
<b>Kirkhill</b>		14			14
<b>Lochend</b>		10			10

Settlement Zone	Completions Outwith Hinterland	Completions Within Inverness Hinterland	Completions Within Nairn Hinterland	Completions Within RACE Hinterland	Total Hinterland Completions
Marybank				5	5
Maryburgh				1	1
Moniack		23			23
Moy		5			5
Muir Of Ord				39	39
Munlochy				16	16
Nairn			23		23
Newmore				12	12
Nigg	2				0
North Kessock				13	13
Portmahomack	11				0
Resolis				8	8
Seaboard	15				0
Strathconon	8				0
Stratherrick	44				0
Strathpeffer	1			20	20
Struy	4	27			27
Tain	2			14	14
Tomatin	11				0
Tore				2	2
Outwith SZ	1	1			1
All Completions Outwith Allocated Sites & SDAs	275	437	80	293	810



**Table 5: House Completions in Flood Risk Areas**

<b>Housing Completions in 1 in 200 year Return Period Flood Risk Areas, Jan 2000 to Dec 2010, by Area (Datazone)</b>				
<b>Area (Datazone)</b>	<b>Coastal</b>	<b>Fluvial</b>	<b>Coastal &amp; Fluvial</b>	<b>Total</b>
Alness Kirkside		10		10
Alness Teaninich		2		2
Avoch		5		5
Balnain		2		2
Beauly Rural		1		1
Cawdor		2		2
Conon Bridge		3		3
Conon Rural		9		9
Dalcross		3		3
Dingwall Central			1	1
Drumnadrochit		1		1
Evanton		3		3
Ferindonald		1		1
Garve, Achnasheen & Kinlochewe		3		3
Invergordon Rural		1		1
Inverness Ballifeary		147		147
Inverness Central & Longman		3		3
Inverness Central North West		18		18
Inverness Crown East		51		51
Inverness Haugh West		3		3
Inverness Inshes		124		124
Inverness Lochardil East		3		3
Inverness Merkinch East	48		24	72
Inverness Merkinch North	8			8
Inverness Merkinch Telford			15	15
Inverness Ness Castle		1		1
Inverness South		109		109
Inverness Upper Drummond		1		1
Killen & Raddery		1		1
Loch Ness East		3		3
Loch Ness South		7		7
Muir of Ord North West		3		3
Munlochy		1		1
Nairn Achareidh North		2		2
Nairn East Rural		1		1
Nairn Fishertown East	3			3
Nairn South Rural		2		2
Nigg & Fearn		2		2
Scotsburn & Barbaraville		1		1
Strathconon		5		5
Strathglass		12		12
Strathnairn & Strathdearn		7		7
Tain East Rural	4	2		6
Tore & Kinkell		1		1
<b>All Areas</b>	<b>63</b>	<b>556</b>	<b>40</b>	<b>659</b>

**Table 6: House Completions Adjacent to Category A Listed Buildings**

<b>New House Completions and Conversions Within 50 Mtrs of a Category A Listed Building, 2000 to 2010</b>	
<b>Listed Building</b>	<b>Number of New Houses</b>
<b>2 Bridge Street And Church Street, Town Steeple, Inverness</b>	30
<b>54-60 (Even Numbers Only) High Street Inverness</b>	10
<b>9 And 11 High Street, Bank Of Scotland, Inverness</b>	1
<b>Castle Brae, St Duthus Collegiate Church With St Duthus Church, Graveyard And Retaining Wall, Tain</b>	1
<b>Church Street, East Parish Church, Cromarty</b>	2
<b>Church Street, Hugh Miller's Cottage, Cromarty</b>	1
<b>Fort Augustus Abbey Church</b>	65
<b>Fortrose Cathedral Square, Chapter House</b>	1
<b>High Street, Tolbooth And Sheriff Court,Tain</b>	9
<b>High Street, Town House Inverness</b>	13
<b>Huntly Street, Balnain House Inverness</b>	18
<b>Portmahomack Harbour Street Southern Warehouse</b>	1
<b>Total</b>	152

**Table 7: House Completions Adjacent to Scheduled Ancient Monuments**

<b>New House Completions On or Within 50 Mtrs of a Scheduled Ancient Monument</b>	
<b>Scheduled Ancient Monument</b>	<b>New House Completions</b>
<b>Ballagan,pit alignment 120m SSE of</b>	2
<b>Balloan Cottages,pit circle and enclosure 150m SSE of</b>	37
<b>Caledonian Canal,Dochgarroch Lock - Muirtown Locks</b>	1
<b>Clachmhor, cup-marked stone</b>	1
<b>Culburnie,ring cairn &amp; stone circle</b>	2
<b>Fortrose Cathedral</b>	2
<b>Kilwhimen Barracks, Fort Augustus</b>	6
<b>Knockloam,ring-ditches 500m NW of</b>	1
<b>Newhall Point,chapel and burial ground,Balblair</b>	1
<b>Tain,market cross</b>	2
<b>Tain,St Duthus's Church,collegiate church and burial ground</b>	1
<b>Total</b>	56

**Table 8: House Affordability, 2010**

<b>House Affordability 2010: Lower Quartile Prices for Open Market Sales and Average Household Income (settlements with more than 10 sales only)</b>				
<b>Settlement Zone</b>	<b>Number of Sales</b>	<b>Lower Quartile Price (1)</b>	<b>Average Household Income (2)</b>	<b>Price Divided by Income</b>
<b>Alness</b>	43	102,500	£26,028	3.9
<b>Ardersier</b>	15	103,500	£33,424	3.1
<b>Auldearn</b>	21	147,000	£37,927	3.9
<b>Beauly</b>	17	124,750	£35,081	3.6
<b>Cawdor</b>	10	142,000	£37,538	3.8
<b>Conon Bridge</b>	15	100,750	£30,147	3.3
<b>Culbokie</b>	11	170,000	£36,952	4.6
<b>Culloden</b>	169	114,500	£39,540	2.9
<b>Dingwall</b>	55	103,000	£28,194	3.7
<b>Drumnadrochit</b>	13	132,500	£32,109	4.1
<b>Fort Augustus</b>	11	182,500	£32,109	5.7
<b>Fortrose</b>	29	185,000	£34,862	5.3
<b>Grantown</b>	49	140,000	£27,729	5.0
<b>Invergordon</b>	26	84,625	£26,930	3.1
<b>Inverness</b>	696	115,000	£31,191	3.7
<b>Kildary</b>	16	102,344	£32,146	3.2
<b>Kiltarlity</b>	19	142,500	£35,070	4.1
<b>Kirkhill</b>	10	165,750	£35,081	4.7
<b>Muir Of Ord</b>	42	112,313	£30,526	3.7
<b>Nairn</b>	142	130,000	£29,489	4.4
<b>North Kessock</b>	10	172,695	£34,877	5.0
<b>Portmahomack</b>	14	101,750	£28,747	3.5
<b>Seaboard</b>	12	89,500	£28,747	3.1
<b>Strathpeffer</b>	26	107,500	£29,429	3.7
<b>Tain</b>	42	106,375	£26,019	4.1
<b>IMF</b>	1,663	£116,000	£33,789	3.4
<b>Highland</b>	2,411	£110,000	£32,113	3.4
Source:1) Registers of Scotland / Scottish Government 2) CACI Paycheck				

**Table 9: Primary School Pupil Roll Forecasts  
Primary Schools – Maximum Forecast Roll to 2022  
as a Percentage of 2010 Capacity**

<b>School</b>	<b>Associated School Group</b>	<b>Maximum Forecast Roll (percent of capacity)</b>
<b>Ardross Primary</b>	Alness Academy	69
<b>Bridgend Primary</b>	Alness Academy	85
<b>Coulhill Primary</b>	Alness Academy	74
<b>Kiltearn Primary</b>	Alness Academy	82
<b>Obsdale Primary</b>	Alness Academy	63
<b>Beaully Primary</b>	Charleston Academy	81
<b>Dochgarroch Primary</b>	Charleston Academy	66
<b>Kinmylies Primary</b>	Charleston Academy	122
<b>Kirkhill Primary</b>	Charleston Academy	89
<b>Muirtown Primary</b>	Charleston Academy	74
<b>Teanassie Primary</b>	Charleston Academy	61
<b>Tomnacross Primary</b>	Charleston Academy	85
<b>Ardersier Primary</b>	Culloden Academy	98
<b>Balloch Primary</b>	Culloden Academy	75
<b>Cradlehall Primary</b>	Culloden Academy	90
<b>Croy Primary</b>	Culloden Academy	90
<b>Duncan Forbes Primary</b>	Culloden Academy	108
<b>Smithton Primary</b>	Culloden Academy	200
<b>Conon Primary</b>	Dingwall Academy	71
<b>Dingwall Primary</b>	Dingwall Academy	76
<b>Ferintosh Primary</b>	Dingwall Academy	35
<b>Marybank Primary</b>	Dingwall Academy	75
<b>Maryburgh Primary</b>	Dingwall Academy	57
<b>Mulbuie Primary</b>	Dingwall Academy	77
<b>Strathconon Primary</b>	Dingwall Academy	74
<b>Strathgarve Primary</b>	Dingwall Academy	80
<b>Strathpeffer Primary</b>	Dingwall Academy	71
<b>Tarradale Primary</b>	Dingwall Academy	84
<b>Avoch Primary</b>	Fortrose Academy	83
<b>Cromarty Primary</b>	Fortrose Academy	59
<b>Culbokie Primary</b>	Fortrose Academy	66
<b>Munlochy Primary</b>	Fortrose Academy	71
<b>North Kessock Primary</b>	Fortrose Academy	101
<b>Resolis Primary</b>	Fortrose Academy	79
<b>Tore Primary</b>	Fortrose Academy	58
<b>Balnain Primary</b>	Glenurquhart High	84
<b>Cannich Bridge Primary</b>	Glenurquhart High	89
<b>Glenurquhart Primary</b>	Glenurquhart High	77
<b>Milton Primary</b>	Invergordon Academy	79
<b>Newmore Primary</b>	Invergordon Academy	32
<b>Park Primary</b>	Invergordon Academy	59
<b>South Lodge Primary</b>	Invergordon Academy	81

<b>School</b>	<b>Associated School Group</b>	<b>Maximum Forecast Roll (percent of capacity)</b>
<b>Central Primary</b>	Inverness High	65
<b>Dalneigh Primary</b>	Inverness High	90
<b>Merkinch Primary</b>	Inverness High	79
<b>Aldourie Primary</b>	Inverness Royal Academy	125
<b>Buns-goil Ghaidhlig Inbhir Nis</b>	Inverness Royal Academy	85
<b>Cauldeen Primary</b>	Inverness Royal Academy	112
<b>Farr Primary</b>	Inverness Royal Academy	59
<b>Foyers Primary</b>	Inverness Royal Academy	33
<b>Hilton Primary</b>	Inverness Royal Academy	109
<b>Holm Primary</b>	Inverness Royal Academy	117
<b>Lochardil Primary</b>	Inverness Royal Academy	130
<b>Stratherrick Primary</b>	Inverness Royal Academy	72
<b>Kilchuimen Primary</b>	Kilchuimen Academy	57
<b>Crown Primary</b>	Millburn Academy	87
<b>Daviot Primary</b>	Millburn Academy	41
<b>Drakies Primary</b>	Millburn Academy	79
<b>Inshes Primary</b>	Millburn Academy	110
<b>Milton of Leys Primary</b>	Millburn Academy	135
<b>Raigmore Primary</b>	Millburn Academy	115
<b>Strathdearn Primary</b>	Millburn Academy	69
<b>Auldearn Primary</b>	Nairn Academy	93
<b>Cawdor Primary</b>	Nairn Academy	52
<b>Millbank Primary</b>	Nairn Academy	70
<b>Rosebank Primary</b>	Nairn Academy	65
<b>Craighill Primary</b>	Tain Royal Academy	122
<b>Hill of Fearn Primary</b>	Tain Royal Academy	95
<b>Hilton of Cadboll Primary</b>	Tain Royal Academy	71
<b>Inver Primary</b>	Tain Royal Academy	49
<b>Knockbreck Primary</b>	Tain Royal Academy	113
<b>Tarbat Old Primary</b>	Tain Royal Academy	72

**Table 10: Secondary School Pupil Roll Forecasts**

<b>Secondary Schools – Maximum Forecast Roll to 2022 as a Percentage of 2010 Capacity</b>	
<b>School</b>	<b>Maximum Forecast Roll (percent of capacity)</b>
<b>Alness Academy</b>	66
<b>Charleston Academy</b>	105
<b>Culloden Academy</b>	125
<b>Dingwall Academy</b>	89
<b>Fortrose Academy</b>	89
<b>Glenurquhart High</b>	66
<b>Invergordon Academy</b>	77
<b>Inverness High</b>	87
<b>Inverness Royal Academy</b>	121
<b>Kilchuimen Academy</b>	63
<b>Millburn Academy</b>	127
<b>Nairn Academy</b>	93
<b>Tain Royal Academy</b>	74