Local Development Plan - Draft Topic Paper

Rural Development

May 2025

Introduction

Thanks for taking an interest in this Topic Paper, which is part of the evidence we're drawing together for our new Local Development Plan. The following notes explain what the Topic Papers cover and how these fit into the process to prepare the new Plan. At the bottom of the notes, you will find a list of guidance and information should you wish further details.

What is a Topic Paper?

The first stage in preparing a new Local Development Plan is the evidence gathering stage, which is the stage we are currently in. This involves collating information on key relevant policies, strategies and data for an Evidence Report which the National Park Authority has to submit to the Scottish Government for a review that is called a 'gate check'. This to ensure that sufficient information is available to start preparing a new Local Development Plan. The next step, after the gate check, is preparing a Proposed Plan which will set out policies, proposals and priorities which will be formally issued for a period of consultation.

To break the gathered evidence up into manageable blocks, we have created 10 Topic Papers by grouping the most closely related national planning policies of NPF4 (see Table below). Each of these 10 Topic Papers aim to summarise relevant national, regional and local evidence and information for the given topic area. Whilst we have grouped these national planning policies into 10 Topic Papers, we fully acknowledge that there are overlaps and linkages between these policies; for example, matters such as climate, nature, and flooding are of relevance to all of the topic areas. We have aimed to highlight these links, where explicit, in the Topic Papers.

How are the Topic Papers structured?

The Topic Papers cover all National Planning Framework 4's policies, as summarised in the table below.

Topic paper 1: **Climate and Land Use**	Topic paper 2: **Biodiversity, Natural Places, and Forestry, Woodland and Trees**	Topic paper 3: **Infrastructure First**	Topic paper 4: **Flooding, Water Management and Blue and Green infrastructure**	Topic paper 5: **Energy, and Heat and Cooling**
1. Tackling the Climate and Nature Crisis 2. Climate Mitigation and Adaptation 5. Soils 10. Coastal Development Land Use	3. Biodiversity 4. Natural Places 6. Forestry, Woodland and Trees	18. Infrastructure First 24. Digital Infrastructure	22. Flood Risk and Water Management 20. Blue and Green Infrastructure	11. Energy 19. Heat and Cooling
Topic paper 6: **Sustainable Transport**	Topic paper 7: **Housing**	Topic paper 8: **Living Well Locally**	Topic paper 9: **Cultural Heritage and Place**	Topic paper 10: **Rural Economy**
13. Sustainable Transport	16. Quality Homes 17. Rural Homes	15. Local Living and 20 Minute Neighbourhoods 23. Health and Safety 9. Brownfield, vacant and derelict land and empty buildings 21. Play, recreation and sport 12. Zero Waste	14. Design, Quality and Place 7. Historic Assets and Places 31. Culture and Creativity	29. Rural Development 30. Tourism 28. Retail 27. City, town, local and commercial centres 26. Business and Industry 32. Aquaculture 33. Minerals 25. Community Wealth Building

Each of the Topic Papers has the same format, as follows:

- List of the relevant sections of the Planning Act (and any other relevant legislation and statutory requirements);

- Links to the Evidence that informs that Topic Paper;

- Context of National Planning Framework 4 (NPF4) and the National Park Partnership Plan (NPPP)

- Summary of the selected Evidence for that Topic Paper;

- Implications that the Evidence presents for the preparation of the new Local Development Plan.

Additional sections in the Papers (i.e. Summary of Stakeholder Engagement & Statement of Agreement/Dispute) will be added upon the completion of this engagement phase and prior to the completion of the Evidence Report and its submission to Scottish Government.

It is important to note that the Topic Papers do not present any proposals– such as proposed sites for development. As these Papers are technical and follow a structure and template required by the Scottish Government, an additional 6 Area Summaries have also been prepared. These are separate map-based reports which have been designed to provide a summary of how this technical content relates to different areas of the National Park, for the series of in-person workshops during May and June. These also include a summary of the Local Place Plans prepared by communities, which the majority of communities have either prepared or are under preparation. While these reports will be primarily be used at in-person workshops, they will also included on the website if you would prefer to feedback on those.

The Topic Papers are engagement drafts; these are not the final ones that we will include within our Evidence Report. The Topic Papers have been prepared by National Park staff with advice and comments incorporated where possible from public bodies such as SEPA, Historic Environment Scotland, NatureScot, Transport Scotland and the Councils that cover the National Park. Where data or information has not been available, incomplete or is currently in the process of being finalised, this has been highlighted in the Topic Paper and where relevant this will be actioned for the final versions for the Evidence Report.

We are now sharing the Topic Papers with wider stakeholders who would like to review and provide us with feedback, helping us to identify any gaps or pieces of evidence we should also consider for the Evidence Report. This feedback can be given by filling in the survey available on our website.

The Topic Papers are technical and present a lot of information.   This is due to their nature as baseline information to be reviewed by Scottish Government, as the foundation for the new Local Development Plan. We have also created shorter map-based summaries for different areas of the Park to be more accessible, as introduced above.

Feedback will help finalise the Topic Papers. Once we have completed the 8-week engagement period, we will review all the responses we have received. We will make changes to the Topic Papers where required and collate these into the full Evidence Report, which will also summarise the outcomes of our engagement. It is this full – finalised - Evidence Report that the Park Authority Board will need to approve before it can be submitted to the Scottish Government for review at the 'gate check'.

Next stage. Once we have received Scottish Government's feedback on whether we can either proceed or need to amend the Report the next stage is preparing the Proposed Plan (draft Local Development Plan). As noted already, there will be formal public consultation on the Proposed Plan.

Further information

[Scottish Government's Guidance on preparing a Local Development Plan](#)

[National Planning Framework 4](#)

[Loch Lomond and the Trossachs National Park Development Plan Scheme](#)

Contact
If you need help with any of the above or have queries on the Topic Papers, please contact localdevplan2@lochlomond-trossachs.org or call us on 01389 722600.

Issue: Topic/Place	Topic Paper 10 – Rural Economy
Information required by the Act regarding the issue addressed in this section	**Community Wealth Building -** Town and Country Planning (Scotland) (Act) 1997, as amended, • Section 15(5) 'the principle physical, cultural, economic, social, built heritage and environmental characteristics of the district' **Business and Industry -** Town and Country Planning (Scotland) (Act) 1997, as amended, • section 15(5) - the principal physical, cultural, economic, social, built heritage and environmental characteristics of the district • Section 15 (5) - the principal purposes for which land is used. **City, Town, Local and Commercial Centres -** Town and Country Planning (Scotland) (Act) 1997, as amended, • section 15(5) - the principal physical, cultural, economic, social, built heritage and environmental characteristics of the district; • section 15(5) - the principal purposes for which the land is used **Retail -** Town and Country Planning (Scotland) (Act) 1997, as amended, • section 15(5) - the principal physical, cultural, economic, social, built heritage and environmental characteristics of the district; • section 15(5) - the principal purposes for which the land is used

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Rural Development - Town and Country Planning (Scotland) (Act) 1997, as amended,

- Section 15(5) – the extent to which there are rural areas within the district in relation to where there has been a substantial decline in population.

Tourism - Town and Country Planning (Scotland) (Act) 1997, as amended,

- section 15(5)'the principal physical, cultural, economic, social, built heritage and environmental characteristics of the district'.

- Section 15 (5) the principal purposes for which land is used.

Aquaculture - Town and Country Planning (Scotland) (Act) 1997, as amended,

- Section 15(5) 'the principle economic and environmental characteristics of the district'

- Regulation 9 – have regard to the national marine plan and any regional marine plan

Minerals - Town and Country Planning (Scotland) (Act) 1997, as amended,

- Section 15(5)(a) 'the principal physical, cultural, economic, social, built heritage and environmental characteristics of the district'

Other relevant legislation

- The Aims of National Parks in Scotland (as set out in the National Parks (Scotland) Act 2000)

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Links to Evidence

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Links to Evidence

National Park Partnership Plan

National Park Partnership Plan 2024-2029

Overarching

https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/disability/bulletins/disabilityandemploymentuk/2019

Office for National Statistics – Employment Activity and Employment Rate

Claimant Count - Office for National Statistics

Vacant-and-Derelict-land-audit-2019-Final-for-Web.pdf (lochlomond-trossachs.org)

Policy 25 - Community Wealth Building

Community+Empowerment+Act+-+summary.pdf

Community Ownership in Scotland 2022

Scottish Land Rights and Responsibilities Statement 2022 (www.gov.scot)

Community Wealth Building and Land (landcommission.gov.scot)

Stirling's New Economic Strategy - Invest in Stirling

Community Wealth Building in Argyll and Bute

West Dunbartonshire Economic Development Strategy

Community Asset Transfer Register - Scotland - Community Asset Transfer Register - Spatial Hub Scotland

Asset_Register_01042025.pdf

Policy 26 – Business and Industry

Delivering Economic Prosperity: Commercial Summary (www.gov.scot)

[Scottish Government Labour Market Trends 2025](#)

[Supporting a green recovery: an initial assessment of nature-based jobs and skills](#)

[Stirling's New Economic Strategy – Invest in Stirling](#)

[Economic Strategy (argyll-bute.gov.uk)](#)

[Local development Plan 2017-2021](#)

[Supplementary Planning Guidance - Safeguarding Local Facilities and Business](#)

[Indicative Regional Statial Strategy – September 2020 (lochlomond-trossachs.org)](#)

[Businesses in Scotland 2023 | Statista](#)

[Employment Data](#)

[Distance Travelled to Work](#)

Policy 27 – City, Town, Local and Commercial Centres

[Supporting documents - A New Future for Scotland's Town Centres - gov.scot](#)

[Town Toolkit | Home](#)

[Local development Plan 2017-2021](#)

[Understanding Scottish Places](#)

Policy 28 – Retail

[Getting the Right Change – A Retail Strategy for Scotland](#)

SGF Scottish Local Shop Report 2023 | Scottish Grocers' Federation (SGF)

Local development Plan 2017-2021

Policy 29 – Rural Development

Scottish Government Urban Rural Classification 2020 (www.gov.scot)

Local development Plan 2017-2021

West Loch Lomondside Rural Development Framework Area

Buchanan South Rural Development Framework

Strathard-Framework-Final-2022.pdf (lochlomond-trossachs.org)

Policy 30 – Tourism

Scotland Outlook 2030 - Scotland's tourism strategy

Food Tourism Action Plan

Scotland Marine Tourism Strategy - Giant Strides 2020-2025

Scottish Agritourism, a strategy for sustainable growth - Scottish Agritourism

Scotland residents' view on tourism 2021

Scotland Visitor Survey 2023 Loch Lomond & The Trossachs

Glasgow City Region Strategy

AISTP Strategy 2022-2025 FINAL VERSION Updated 2023.pdf

Perth and Kinross [Action Plan](#)

[Local development Plan 2017-2021](#)

[Visitor Experience Planning Guidance](#)

[Visitor Survey 2019-20 - Here. Now. All of us. - Loch Lomond & The Trossachs National Park](#)

[Board-20190318_Agenda-Item-9_-App1_Camping-Development-Framework-2019-2023.pdf](#)

[Camping Management Zones](#)

[Camping permit areas in the National Park – Google My Maps](#)

[Agenda Item 12 - Appendix 3 Place Programme Delivery Route Map](#)

[Agenda Item 5 - Appendix 3 West Loch Lomond Strategic Development Framework](#)

[Agenda Item 5 - Appendix 4 East Loch Lomond Strategic Development Framework](#)

[Strathard-Trossachs-STID-Mar24.pdf](#)

[Callander-STID-Aug24.pdf](#)

Policy 32 – Aquaculture

[Scotland's National Marine Plan: A Single Framework for Managing Our Seas](#)

[Vision for sustainable aquaculture - gov.scot](#)

[Scottish National Adaptation Plan](#)

[scotlands-fisheries-management-strategy-2020-2030.pdf](#)

finfish-aquaculture-sector-plan.pdf

Scottish wild salmon strategy - gov.scot

Scotland's Marine Economic Statistics 2022 - gov.scot

Blue Economy Vision for Scotland

Marine Scotland - National Marine Plan Interactive

Scotland's Aquaculture | Map

https://informatics.sepa.org.uk/MarineFishFarm/

https://scottishepa.maps.arcgis.com/apps/webappviewer/index.html?id=2218824350e5470e8026076d4138da58

Marine Scotland - National Marine Plan Interactive

https://map.environment.gov.scot/sewebmap/?layers=Wild_Salmonid_Protection_Zones

Water Classification Hub

Map | Scotland's environment web

Policy 33 – Minerals

UK Minerals Yearbook 2021 available to download - British Geological Survey

Collation of the results of the 2019 Aggregate Minerals Survey for Scotland

Local development Plan 2017-2021

National Planning Framework 4 (NPF4) Context

Eight NPF4 policy areas have been grouped into this one Evidence Paper as the policy areas are considered to align with one another in the context of Loch Lomond the Trossachs National Park area. This topic paper is primarily focused on the rural economy within the National Park and the various factors which contribute to its growth or decline. The primary driver of the economy in the National Park is tourism and this facilitates much of the economic activity within The Park, hence why these two key policy areas have been combined. Another key part of our rural economy is the retail sector. Community Wealth building has also been added to this Topic Paper as this is to become a key area of focus. Finally, aquaculture and minerals have also been included within this paper as they form part of the rural economy for the National Park

Policy 25 Community Wealth Building aims to support and facilitate a new strategic approach to economic development that also provides a practical model for building a wellbeing economy at local, regional and national levels. The policy requires Local Development Plans to be aligned with any strategy for community wealth building for the area. Spatial strategies should address community wealth building priorities, identify community assets, set out opportunities to tackle economic disadvantage and inequality and seek to provide benefits for local communities.

Policy 26 Business and Industry states that Local Development Plans (LDP) should allocate sufficient land for business and industry, taking into account business and industry land audits, in particular ensuring that there is a suitable range of sites that meet current market demand, location, size and quality in terms of accessibility and services. The allocation should take account of local economic strategies and support broader objectives of delivering a low carbon and net zero economic recovery and a fairer and more inclusive wellbeing economy. The policy also supports proposals out with areas identified for development if that are of a nature and scale that is compatible with the surrounding area.

Policy 27 City, Town, Local and Commercial Centres aims to promote, encourage and facilitate development within town centres. The policy stipulates that LDPs should support sustainable development within towns and commercial centres. NPF4 guidance suggests that LPDs should identify a network of centres within the local district that reflect the principle of the 20-minute neighbourhood concept. It is also necessary that the LDP provide a portion of their Local Housing Land Requirements in city and town centres and aim to identify opportunities that will support residential development.

Policy 28 Retail is closely linked to Policy 27. NPF4 states that the intent of this policy is to ensure that retail investment is located in sustainable locations which can be accessed by a range of transport modes. The policy states that LDPs should outline where there is a need for further retail provision and should identify locations for healthy food and drink outlets.

Policy 29 Rural Development seeks to ensure that LDPs provide a detailed account of the characteristics of rural areas and that there is an understanding of the economic needs of the area. The policy gives specific support for proposals that contribute to the viability, sustainability and diversity of the local economy such as diversification of business, local production/processing – sawmills, local food production, small scale developments that support remote working, homeworking and community hubs.

Policy 30 Tourism seeks to encourage and support sustainable tourism development that benefits local people, is consistent with net zero and nature commitments, and inspires people to visit Scotland. LDPs should support the recovery, growth and long-term resilience of the tourism sector. The spatial strategy in a LDP should identify suitable locations which reflect opportunities for tourism development by taking full account of the needs of communities, visitors, the industry and the environment. Relevant national and local sector driven tourism strategies should also be taken into account.

Policy 32 Aquaculture aims to ensure that new aquaculture development is in line with the National and Regional Marine Plan and that adverse environmental impacts are minimised. NPF4 seeks to support an aquaculture industry that is sustainable and economically viable whilst contributing to food security.

Policy 33 Minerals seeks to support the sustainable management of resources and minimise the impacts of the extraction of minerals on communities and the environment. Local Development Plans are required to provide at least a 10-year landbank of construction aggregates in relevant market areas.

National Park Partnership Plan (NPPP) 2024 – 2029 Context

The National Park Partnership Plan (NPPP) is divided into three chapters which cover the key themes and issues for the National Park. The final chapter – Chapter 3: *Designing a Greener Way of Living* – focuses on how people live, work and experience the National Park and how this needs to change to respond and adapt to the climate and nature crises as well as to support thriving communities into the future. The eight topics within this topic paper are all covered in this final chapter of the NPPP.

Spending on nature-based and wellness tourism is a growing trend and the National Park's rural economy must adapt to support this whilst also becoming greener, more diverse and more equitable than it is currently. It is also necessary for the National Park to focus on generating and retaining wealth more locally in order to support communities to become more sustainable and resilient. This topic paper aims to bring these key themes together as they all play a crucial role in achieving the above aims of a more sustainable economy which also improves the lives of those who live and work within the National Park.

There is considerable development interest in The Park, primarily for housing and tourism-related developments, however there are areas of The Park which are experiencing development pressure and there is limited scope for development in these areas due to capacity and environmental constraints. The NPPP has concluded that it is unlikely that any new significant sites will be identified for the duration of the new Plan. The NPPP instead, is encouraging that existing vacant and derelict land and brownfield sites will be the focus of new development for both housing and tourism-related facilities. This will also be a key focus of the forthcoming LDP.

The NPPP has identified areas within the National Park for strategic development and investment and these are illustrated in figure 1 of the appendix. This map (figure 1) will become a key consideration for the new LDP and forms part of our evidence base. The NPPP is the overarching vision document for the National Park so it is crucial that the new LDP is in line within these strategic policies.

The NPPP includes an overarching policy for developing and investing within the National Park and this will directly inform equivalent policies for the new LDP. The policy states that development and infrastructure within the National Park will be guided by principles that support climate action, nature restoration, and local community needs, while fostering a greener, low-carbon economy and a wellbeing-focused economy. Key priorities include addressing the climate emergency through sustainable development, maximising opportunities for nature restoration, supporting local living and working, ensuring a just transition for businesses, and promoting community-led development. Nationally significant infrastructure improvements, such as trunk road upgrades, electricity transmission, and hydro-electric projects, will be supported where they safeguard the environment and landscape while enhancing visitor experiences.

Strategic-scale development will focus on Callander, expanding sustainably to support mixed-use development and regional service provision; Balloch, attracting tourism investment, transport improvements, and economic regeneration; and Arrochar & Tarbet, prioritising the redevelopment of vacant and derelict sites to meet community needs and improve infrastructure for visitors.

Large-scale wind farms will not be permitted within the National Park, in line with National Planning Framework 4, and proposals near The Park boundary must be designed to avoid negative impacts on its special landscape qualities. This policy framework ensures sustainable growth, environmental protection, and community resilience, while supporting economic and tourism development in ways that preserve the National Park's unique character.

This chapter also contains several objectives which correspond to the NPF4 policies within this Topic Paper. A summary of the objectives already set within the NPPP have been included below under each policy:

Community Wealth Building – Objective 3 within section 3.2 outlines the Partnership Plan's vision for building community wealth. The Partnership Plan sets an approach which seeks to build community wealth where local businesses and communities benefit from economic transition, retaining and reinvesting wealth locally. Key actions include capacity building, training, and skills development for community anchor organisations, fostering collaboration between the public sector, land managers, businesses, and communities to expand the green economy through new business models and social enterprises. Additionally, communities should be supported in engaging with land use decisions to enhance local influence over land and assets. A new Community Wealth Building approach will be developed to maximise local benefits from new developments and investments.

Business and Industry - The National Park is committed to supporting low-carbon businesses by helping them reduce emissions and transition toward a net-zero economy, this aim is explored in objective 2 within section 3.1 of the Plan. Key actions include enhancing access to specialist technical advice and collaborative opportunities, as well as improving digital and telecommunications infrastructure to optimise business operations

Objective 3 of section 3.1 is also relevant to NPF4 policy 26. The National Park is focused on growing green and nature-based jobs and skills to support a more sustainable and diverse local economy. Key actions include establishing an evidence base to identify skills gaps and labour shortages in key sectors such as nature, land management, and transport, and developing a Green and Nature-Based Skills Action Plan to outline training needs and employment opportunities.

Rural Development - The National Park is committed to delivering strategic development needs by ensuring that nationally significant infrastructure projects, as outlined in National Planning Framework 4, are designed to protect The Park's environmental and landscape qualities while maximising benefits for local communities, businesses, and visitors. Key priorities include sustainable expansion in Callander to support local living, enhancing Balloch as a major visitor and transport hub, and regenerating Arrochar and Tarbet by addressing vacant and derelict sites. The aims and actions for this policy area are detailed in section 3.3, objective 1.

Tourism - Objective 1 in section 3.1 of the Partnership Plan details The National Park's aims to increase sustainable tourism by fostering a thriving visitor economy that transitions towards low-emission, nature-connected experiences while celebrating local culture and heritage.

Key actions include collaborating to develop new tourism opportunities, establishing a baseline for green tourism accreditation to assess business participation, and providing toolkits and guidance to help businesses capitalise on low-carbon tourism.

Summary of Evidence

This Topic Paper is divided into eight sections, reflecting NPF4 policies, each pulling together the relevant policies and data for the National Park area.

The policy areas are:

- Policy 25 – Community Wealth Building
- Policy 26 – Business and Industry
- Policy 27 – City, Town, Local and Commercial Centres
- Policy 28 – Retail
- Policy 29 – Rural Development
- Policy 30 – Tourism
- Policy 32 – Aquaculture
- Policy 33 – Minerals

It is also important to acknowledge that there is overlap between the Rural Economy paper and policy areas explored within other Topic Papers. The relevant Topic Papers and policies that should be read in conjunction with this paper are:

- Topic Paper 7 (Housing) – Policy 17 Rural Homes
- Topic Paper 8 (Living Well Locally) – Policy 15 Local Living and 20 Minute Neighbourhoods
- Topic Paper 9 (Cultural Heritage & Place) – Policy 31 Culture and Creativity

Overarching Data

Many of these policies areas are informed by overlapping datasets that will inform the new Local Development Plan (LDP). To avoid repetition, rather than integrating them into each NPF4 policy area individually, this section presents a comprehensive overview of the key data and insights that underpin the rural economy of the National Park as a whole.

Scottish Index of Multiple Deprivation 2020

SIMD is a "relative measure of deprivation across 6,976 small areas (called data zones)". It is the Scottish Government's standard approach to identify areas of multiple deprivation and is an established source of information to inform the delivery of public services and decision making. If an area is identified as deprived this can relate to people having low incomes but can also mean fewer resources and opportunities, SIMD looks at the extent to which an area is considered deprived relating to 7 factors, namely income, employment, education, health, access to services, crime and housing. SIMD ranks data zones from the most deprived (ranked 1) to least deprived (ranked 6,976). It is acknowledged that data zones in rural areas cover a large geographic extent and reflect a more mixed picture of deprivation.

In a Scottish context, the National Park is generally a wealthy area within Scotland and therefore there are few areas of economic disadvantage within The Park. The two areas which indicate deprivation in this index within the National Park are Balloch to the south of The Park and Cowal to the west of The Park. Balloch has one area within the community which falls within the 5% most deprived areas in Scotland and also has an area which falls within the 10% least deprived areas in Scotland. The SIMD map illustrates that Balloch is a complicated town with a mixture of issues to address. The other area of interest within the National Park is Lochgoilhead which currently sits within the 4th decile of the deprivation index. While this is shown as an area of deprivation on the overall ranking on the SIMD index the primary factor contributing to this lower overall ranking is the geographic access rank which is currently ranked as a 1 out of 10. This area can only be accessed by single track road and there are limited public transport options. There are other small pockets of deprivation within the National Park e.g. Crianlarich, Tyndrum, Balquidder and all of these areas have also received a 1 for geographic access and as a result are classified as deprived. Whilst it is acknowledged this information is dated 2020, it is the most recent Index, but it also requires to be considered with other sources of information and data on the socio-economic circumstances in the National Park's communities.

Vacant and Derelict Land

The Scottish Vacant and Derelict Land Survey (SVDLS) is updated annually each autumn with data returns from Scottish local authorities to the Scottish Government and published the following spring. It involves reporting the annual change in the take-up of brownfield land and recording new sites which have become vacant or derelict. These are mapped and various details are recorded for them, including the former use of the land, the likelihood of it coming back into use and how soon this may take place. Sites are categorised according to whether they are:

- Vacant land – brownfield sites which are ready for new development, and which must be within settlements; or

- Derelict – brownfield sites which can either be inside or outside settlements, but are not ready for new development, for example due to the presence of unusable buildings.

SVDLS sites include those that are allocated for employment use or housing or are windfall sites where developers have pursued planning applications for housing but work on site has not yet started or has stalled. The SVLDS requires Councils to identify sites that have been removed from the survey since the last return, for example due to development on them commencing or due to them becoming naturalised. The SVDLS does not include vacant brownfield sites that are out with settlement boundaries. The National Park has contributed annually to the SVDLS process, including visiting and mapping sites to verify their suitability for inclusion in the return. The latest SVDLS submitted to the Scottish Government was that of October 2024.

The National Park's October 2024 SVDLS submission reports no significant changes from previous surveys, listing eight vacant and derelict sites covering 7.26 ha. These sites, previously allocated for development, remain undeveloped.

The identified sites are spread across the National Park with no clear pattern. In Lochearnhead, *Station Cottages (0.92 ha)* remains under private ownership with no planning updates, while the *Holiday Centre (0.56 ha)* has planning permission for 12 homes but remains undeveloped. In Carrick Castle, a *former hotel site (0.53 ha)* has been vacant since 2001–2004, with plans for eight homes. Drymen's *Salmon Leap (0.25 ha)*, an ex-hospitality site, remains derelict with no planning updates. In Arrochar, the *Former Torpedo Range (3.61 ha)* has been derelict since 2001–2004. In Tarbet, both the *Tourist Information Centre (0.16 ha)* and *Former Harvey's Garage (0.42 ha)* have been vacant since the early 2000s under mixed ownership. In Balloch, *Woodbank (0.81 ha)*, a former residential site vacant since 1981–1985, is currently under consideration for a major tourism development.

The development potential of these sites varies, with four deemed suitable for short-term development, three for medium-term, and one with an undetermined timeline.

Policy 25 – Community Wealth Building

National Context

The Scottish Government defines community wealth building as "*an approach designed to tackle long-standing economic challenges and transform Scotland's local and regional economies by considering the ways in which the public sector, in partnership with the private, third and community sectors, can ensure more wealth is generated, circulated and retained in communities and localities.*"

Community Wealth Building acts as a framework for activity across five interlinked pillars:

- Spending - Maximising community benefits through procurement and commissioning, developing good enterprises, fair work and shorter supply chains.

- Fair Workforce - Increasing fair work and developing local labour markets that support the wellbeing of communities.

- Land and property - Growing social, ecological, financial and economic value that local communities gain from land and property assets.

- Inclusive ownership - Developing more local and social enterprises which generate community wealth, including social enterprises, employee-owned firms and cooperatives.

- Finance - Ensuring that flows of investment and financial institutions work for local people, communities and businesses.

The Community Wealth Building Bill 2025

The Community Wealth Building (Scotland) Bill aims to establish a legislative framework to promote inclusive local economic development and reduce inequality across Scotland. It requires the Scottish Ministers to produce a national Community Wealth Building Statement, outlining their strategies to reduce economic disparities and grow local and regional economies by keeping wealth circulating within communities. Key measures include promoting fair employment, supporting local businesses and social enterprises, using public procurement to benefit communities, and encouraging community land ownership and the reuse of vacant land.

Local authorities, alongside relevant public bodies such as Health Boards and Skills Development Scotland, must jointly develop and publish a Community Wealth Building Action Plan within three years of the Act's commencement. These plans must detail concrete steps to retain wealth locally, such as supporting local procurement, employee ownership, and entrepreneurship.

The Bill also mandates the Scottish Ministers to issue guidance on community wealth building, which specified public bodies must consider when developing corporate strategies. A wide range of public bodies are listed in the Schedule, including National Park Authorities, VisitScotland, Scottish Natural Heritage, and Police Scotland.

Overall, the Bill marks a shift toward a more community-centred economy, empowering local stakeholders and embedding equity and sustainability in economic planning.

Community Empowerment (Scotland) Act 2015

The Community Empowerment (Scotland) Act 2015 is a landmark piece of legislation designed to enhance the role of communities in decision-making processes across Scotland. It aims to empower local communities by giving them more influence over public services, assets, and decisions that affect their lives. The Community Empowerment (Scotland) Act 2015 enhances community involvement in decision-making and access to resources. Key provisions include:

1. Community Participation: Empowers communities to influence public services and outcomes through participation requests.

2. Asset Transfer: Allows communities to request ownership or management of public assets, with clear reasons required for rejections.

3. Right to Buy Land: Extends the right to buy land to urban and rural areas, even if not for sale, under specific conditions.

4. Allotments: Increases access to land for community growing, requiring councils to address high demand.

5. Community Planning: Strengthens partnerships to improve local outcomes and reduce inequalities.

6. National Outcomes: Mandates public consultation to ensure national priorities reflect community aspirations.

7. Local Democracy: Promotes greater involvement in budgeting and planning decisions.

The Act aims to empower communities, reduce inequalities, and foster collaboration between citizens and public authorities. The Act emphasises transparency, accountability, and a bottom-up approach to governance. It seeks to empower communities to have greater control over their resources, decision-making, and future development, thereby fostering stronger, more resilient communities. This legislation is part of Scotland's broader agenda to promote social justice and reduce inequality through active community participation.

Scottish Land Rights and Responsibilities Statement 2022

The Scottish Land Rights and Responsibilities statement was published in 2022. It articulates the national vision for the ownership, use and management of land and sets out how competing priorities from landowners, managers, local communities and society at large should be balanced in order to achieve a more equitable society.

The statement sets out the vision as being:

"A Scotland with a strong and dynamic relationship between its land and people, where all land contributes to a modern, sustainable and successful country, supports a just transition to net zero, and where rights and responsibilities in relation to land and its natural capital are fully recognised and fulfilled."

The statement also details the seven principles which underpin the overarching vision:

1. The overall framework of land rights, responsibilities and public policies should promote, fulfil and respect relevant human rights in relation to land, contribute to public interest and wellbeing, and balance public and private interests. The framework should support sustainable economic development, protect and enhance the environment, support a just transition to net zero, help achieve social justice and build a fairer society for the common good.

2. There should be a more diverse pattern of land ownership and tenure, with more opportunities for citizens to own, lease and have access to land.

3. More local communities should have the opportunity to own, lease or use buildings and land which can contribute to their community's wellbeing and future development.

4. The holders of land rights should exercise these rights in ways that take account of their responsibilities to meet high standards of land ownership, management and use. Acting as the stewards of Scotland's land resource for future generations they should contribute to wider public benefit, sustainable growth and a modern, successful country.

5. Land ownership, management and use should deliver a wide range of social, environmental, economic and cultural benefits.

6. There should be transparency about the ownership, use and management of land, and this information should be publicly available, clear and contain relevant detail.

7. There should be meaningful collaboration and community engagement in decisions about land.

Scottish Land Commission – Community Wealth Building and Land

The Scottish Land Commission published guidance which sets out practical actions that public bodies can take to use and manage land productively and in the public interest.

The actions set out below are guidelines for good practice. They set out the measures and activities that can be taken to support a community wealth building approach to managing land and buildings. There are six headline areas for action:

- Supporting net zero ambitions and sustainable development – Taking and implementing decisions, use and management in ways that promote good stewardship

- Positive management of land and assets – Proactively managing your estate

- Productive re-use of land and buildings – Addressing vacant and derelict land

- Collaboration and partnership – Engaging with your community and involving others in decisions about land and buildings

- Supporting economic growth and community aspirations – Promoting and enabling diversified ownership and management of land and buildings, including community ownership

- Sharing information – Being open and transparent about land and buildings and about decision-making processes and plans.

The guidance goes into detail on each of the headline actions and provides further detail on how to deliver against the actions.

Local Context

Community Ownership in Scotland 2022

This document was published in 2023 and sets out the official statistics for community ownership in Scotland in 2021. The main finding of the report states that there are approximately 754 assets in community ownership as of December 2022. The Highlands and Argyll and Bute local authorities together contain 274 assets which corresponds to 36% of all the assets in community ownership. The majority of assets in community ownership are land and buildings.

The data illustrates that in 2000 there were a total of 75 community groups who owned assets compared to 505 community groups in 2022. This increase has been due to a number of factors including better funding and policy which supports communities to take on these assets.

The document provides figures on a range of different factors associated with community ownership e.g. assets by type, size purchase price etc. All provide relevant information but a particularly useful set of statistics to review is the Assets by Urban Rural Classification 2020 and 2022. Loch Lomond and the Trossachs National Park is classified as either accessible rural or remote rural by the Scottish Government's Urban Rural Classification 2020, and the data demonstrates that the majority of community owned assets are within similar classifications to the National Park. The data shows that remote rural areas contain 60% of the community owned assets within Scotland and a further 19% are within accessible rural areas. The trend is valuable evidence for the National Park confirming that rural communities are motivated and interested in taking on community ownership projects.

The National Park is covered by four local authorities – Stirling, Argyll and Bute, Perth and Kinross and West Dunbartonshire. In 2022 the Local Authority with the highest number of community owned assets – across the whole Council areas – was Argyll and Bute who fall within the 51 – 100 range. Stirling and Perth and Kinross both fall within the 16 – 50 community owned assets range and therefore are below Argyll and Bute. West Dunbartonshire is shown to have the least number of community owned assets as it falls within the 1 – 5 range on the Scottish Government map.

Stirling Council Economic Strategy 2022

Stirling Council published their most recent Economic Strategy in 2022. The strategy covers several key themes and details the Council's aims in relation to each theme. One of the key actions specified in the strategy is to 'Maximise the Impact of Local Organisations' and to do this the Council aims to develop and deliver a Community Wealth Building approach.

Stirling have set out 5 key principles of their Community Wealth Building Approach:

- Plural Ownership: developing and growing small enterprises, community organisations, cooperatives, etc

- Financial Power: keep the flows of investment within our local economy

- Fair Employment: investments which create jobs and opportunities for local citizens

- Procurement: 'Keeping It Local', buying local goods and services

- Use of land and property: using our local assets for local financial and social gain

Community Wealth Building in Argyll and Bute – A Framework for Action

Community Wealth Building in Argyll and Bute provides a comprehensive framework for implementing a Community Wealth Building (CWB) approach in the area. The report identifies significant challenges faced by Argyll and Bute, including a housing crisis, depopulation, and the adverse effects of market-driven economic practices. It highlights the urgent need for a shift toward a more equitable economic model rooted in CWB principles to ensure that benefits flow directly to local communities. This aligns with Scotland's broader commitment to fostering a wellbeing economy.

The strategy is built around five key pillars. First, Spending focuses on utilising public procurement to benefit local suppliers and promote fair work practices. Second, Workforce emphasises supporting fair employment, ensuring living wages, and creating job progression opportunities for local residents. Third, Inclusive Ownership seeks to encourage cooperative, community, and employee ownership of assets and businesses to help retain wealth locally. Fourth, Land and Property aims to maximise the value of land and property for local communities by promoting community-led ownership and addressing vacant or derelict land. Finally, Finance seeks to develop alternative financial mechanisms such as community bonds, credit unions, and local investment strategies to support local economic development.

The report acknowledges progress made in areas such as renewable energy projects, support for social enterprises, and local procurement initiatives. However, challenges persist, including a lack of coordination, capacity issues, and limited access to financing, which hinder the full realisation of CWB principles.

To address these challenges, the report offers key recommendations. These include embedding CWB into economic strategies and aligning them with national policies, such as Scotland's National Strategy for Economic Transformation. The report also proposes establishing time-limited groups and working committees to drive specific CWB initiatives. It emphasises the need to support employee ownership and community-led renewable energy projects, develop a local Affordable Workspace Strategy, and address barriers to community asset transfers. Strengthening partnerships with anchor institutions is also highlighted as a critical step to enhance their role in fostering local economic development.

The role of the National Park Authority is highlighted within the document, and it is suggested that the National Park Authority could play a key role in addressing challenges such has the housing and climate emergencies. The report suggests that

collaboration with landowners to align land use with community wealth building principles and to maximise the benefits for local people.

West Dunbartonshire Economic Development strategy 2022 - 2027

The West Dunbartonshire Council (WDC) Economic Development Strategy 2022-27 builds on the Council's unique approach to the Foundational Economy, which focuses on supporting citizenship and welfare through the provision of essential goods and services such as health, food, education, housing, and more. The strategy covers key areas such as procurement, skills development, business support, employability, placemaking, 20-minute neighbourhoods, housing, community empowerment, climate action, and the green economy. Additionally, the strategy emphasises Community Wealth Building (CWB) as a cornerstone of its approach, highlighting participatory budgeting as a key policy.

CWB is a people-focused approach to local economic development, designed to redirect wealth into the local economy and place control and benefits into the hands of local communities. The strategy acknowledges the importance of CWB principles and outlines the Council's response through practical actions:

- Plural Ownership of the Economy: WDC provides support for social enterprises to start and grow, fostering diverse forms of ownership in the local economy.

- Financial Power for Local Places: Initiatives like the Scotland Loves Local scheme encourage residents to prioritise local businesses, strengthening high streets and supporting community businesses.

- Fair Employment and Just Labour Markets: The Working4U employability service focuses on engaging harder-to-reach groups, helping them transition into meaningful employment opportunities.

- Progressive Procurement of Goods and Services: WDC's procurement practices align with CWB principles by prioritising local suppliers and ethical sourcing, as detailed in the broader strategy.

- Socially Productive Use of Land and Property: Underutilised assets have been successfully transferred to community groups through the community asset transfer process, empowering local organisations to make productive use of land and facilities.

WDC has committed to participatory budgeting as a core policy, in line with COSLA's 1% Framework Agreement from October 2017. This agreement mandates that at least 1% of local authority budgets (excluding council tax) be allocated through

participatory processes. Since then, WDC's Communities Team has facilitated significant PB initiatives, ranging from small grants to tests of mainstreaming PB in specific service areas and budgets.

By prioritising participatory processes, WDC aims to foster stronger community engagement, ensure responsive governance, and enhance the wellbeing of its residents while aligning with the broader principles of CWB.

National Park context

Loch Lomond and the Trossachs Asset Register

The National Park Authority's Asset Register is maintained in accordance with Section 94 of the Community Empowerment (Scotland) Act 2015. This legislation requires public authorities to publish a register of land and buildings they own or lease, to the best of their knowledge and belief. The aim is to increase transparency and support community asset transfer, where communities can request to take over ownership or management of public assets. The asset register was last updated in April 2025 and contains 41 assets either owned or tenanted by the National Park. Of the 41 assets 8 are either let out in full or let out in part.

The assets held by the National Park Authority serve a wide range of purposes, supporting recreation, conservation, tourism, and park operations. These are grouped into several key categories:

Visitor and Recreational Facilities include car parks, campsites, cycle paths, picnic areas, walking trails, piers, and slipways, all designed to enhance public enjoyment and tourism. Notable examples include Bracklinn Falls Car Park, Falls of Falloch, Milarrochy Bay, and the Luss Visitor Centre and Picnic Site.

Heritage and Conservation Sites contribute to environmental protection and biodiversity, encompassing wildlife habitats, loch shorelines, and woodland areas. Key sites include Aberfoyle Wildlife Site, Critreoch Wildlife Site, and Kenmore Woods.

Essential Public Services and Amenities such as public toilets, visitor centres, and ranger stations provide vital facilities for visitors. Important locations include the Balmaha Visitor Centre, Luss Public Toilets, and Rowardennan Toilets.

Administrative and Operational Buildings support the day-to-day functioning of The Park Authority. These include office spaces and maintenance units, such as the Callander Office, Alexandria Maintenance Unit, and the National Park Headquarters at Carrochan.

Infrastructure and Transport Facilities include pontoons, bridges, and cycle routes that facilitate both access and sustainable tourism. Noteworthy examples are the Loch Lomond Shores Pontoon, Tarbet Slipway and Pier, and parts of the National Cycle Network.

Assets vary in tenure and usage, with some fully owned and occupied by The Park Authority, while others are leased or partially used. They are categorised as owner-occupied, tenant-occupied, or let-out, depending on their function and management arrangements.

Community Owned Assets and Enterprise Database

The National Park holds an internal database of all (known to The Park Authority): Community Owned Assets, Assets Leased by the Community, Assets Managed by the community and Community led Enterprises/Projects. The data base was last updated in 2024 with the support of the local communities within in The Park. An overview of these assets provided the following information:

- There are 75 assets in community ownership in the National Park area.

- The most commonly owned asset by communities is a community hub which is usually a village hall. There are approx. 21 village halls currently in community ownership across the National Park.

- The majority of community owned assets are located in Stirling and Argyll and Bute council areas

Within the boundary of Loch Lomond & The Trossachs National Park, there are a total of 75 community-owned assets spread across four council areas. Stirling has the highest number, with 44 community-owned assets, followed by Argyll and Bute with 25. Perth and Kinross and West Dunbartonshire each have 3 community-owned assets within The Park area.

Policy 26 – Business and Industry

National context

Scotland's National Strategy for Economic Transformation

Scotland's National Strategy for Economic Transformation was published in March 2022 and sets out a vision for Scotland to have a wellbeing economy which thrives across economic, social and environmental dimensions.

The strategy has moved away from solely concentrating on economic growth investing in people, infrastructure, assets and fostering innovation and taking advantage of international opportunities to a more inward-looking approach, focusing on the creating a wellbeing economy, achieving this by respecting environmental limits embodied by the climate and nature targets. There are long-standing challenges of weak productivity, relative lack of new business growth and persistent poverty. The Scottish Government have set 5 new actions under the ambition of a fairer, wealthier and greener economy – entrepreneurial nation, strengthen new markets and jobs from just transition to net zero, make Scotland more productive and innovative, ensure people have the skills, reorient the economy towards wellbeing and fair work.

Scottish Government Labour Market Trends 2025

The February 2025 Labour Market Trends Report provides an overview of Scotland's employment, unemployment, and economic activity, utilising data from HMRC's Pay As You Earn (PAYE) Real-Time Information (RTI), the ONS Labour Force Survey (LFS), and Claimant Count estimates.

Key Labour Market Statistics:

- In January 2025, Scotland had 2.46 million payrolled employees, a 0.1% decrease from the previous year, compared to a 0.2% increase in the UK.

- The median monthly pay for payrolled employees in Scotland was £2,486, reflecting a 5.2% increase from January 2024, though lower than the UK's 5.7% rise.

- Scotland's claimant count was 110,600, increasing by 1.4% over the month and 4.3% over the year, with an unemployment rate of 3.8%, lower than the UK's 4.6%.

Employment and Economic Activity:

- The employment rate for people aged 16 to 64 was 74.2%, increasing by 0.9 percentage points over the quarter, but remaining below the UK's 74.9%.

- The unemployment rate for those 16 and over was 3.8%, 0.5 percentage points higher than the previous quarter but 0.7 percentage points lower than the previous year.

- The economic inactivity rate (people not working or seeking employment) was 22.8%, 1.2 percentage points lower than the previous quarter but above the UK rate of 21.5%.

This report highlights Scotland's labour market resilience, with employment and pay levels rising despite economic uncertainties. However, challenges remain, particularly in addressing higher economic inactivity rates and lower pay growth compared to the UK average.

Supporting a green recovery: an initial assessment of nature-based jobs and skills | NatureScot

Nature Scot published "Supporting a Green Recovery: An Initial Assessment of Nature-Based Jobs and Skills" which explores the role of nature-based sectors in Scotland's transition to a net-zero economy. It highlights the importance of natural capital as a driver for sustainable economic recovery, especially following the COVID-19 pandemic. Key findings emphasise the potential for significant job growth, skills development needs, and opportunities in nature-based sectors.

Nature-based jobs accounted for approximately 195,000 roles in 2019, representing 7.5% of Scotland's workforce. These jobs span sectors such as agriculture, forestry, tourism, and food and drink, which are dependent on natural capital. Nature-based roles grew five times faster than overall employment between 2015 and 2019, underlining their growing importance. Future growth is anticipated, driven by expanded activities like peatland restoration, forestation, and urban green infrastructure projects.

The report identifies challenges such as gender imbalances, an aging workforce, and skills shortages in operational and technical roles. It stresses the need for strategic workforce planning, targeted training programs, and promoting Modern Apprenticeships to address these gaps. Additionally, fostering partnerships between public, private, and academic institutions is vital to support research and innovation in nature-based solutions, green finance, and sustainable land management.

The report concludes that building a diverse and skilled workforce is essential for realising Scotland's green recovery and achieving long-term sustainability goals. It calls for coordinated action to address regional variations in job distribution and support equitable access to nature-based employment opportunities.

Stirling Council Economic Strategy 2022

The Stirling Council area presents significant opportunities for economic growth, driven by high business start-up rates, a well-qualified young population, and a strong sense of community. However, disparities in employment deprivation are evident. While the area's average employment deprivation rate is 7%, this figure drops to less than 1% in affluent areas but rises to 31% in deprived areas, significantly above the national average of 9% (SIMD 2020).

Sectoral employment in Stirling mirrors that of the nearby National Park, though there is a greater concentration of jobs in health, social care, and education, likely due to the presence of the University of Stirling and Forth Valley Royal Hospital just outside The Park boundaries.

Unemployment levels in Stirling are currently lower than Scotland's overall rate, standing at 4.9% compared to the national average of 6.3%. At any given time, approximately 3,000 people in the area are seeking but unable to find employment.

Stirling's quality of life is widely recognised as a key strength. According to a 2021 survey, 81% of businesses consider quality of life a strength or major strength, and a 2019 household survey revealed that 97% of residents rate their neighbourhood as good or fairly good.

Argyll and Bute Council Economic Strategy 2024 -2034

The Argyll and Bute Council's Economic Strategy Refresh 2024–2034 outlines forward-looking plan to build a resilient, inclusive, and sustainable local economy over the next decade. Rooted in a place-based and people-cantered approach, the strategy focuses on four key pillars: *People*, *Place*, *Planet*, and *Prosperity*. It seeks to address demographic challenges, economic disparities, and climate change, while capitalising on the region's natural assets and community strengths. The strategy promotes a wellbeing economy through community wealth building, fair work, and inclusive growth. It emphasises collaboration across public, private, and third sectors to tackle local issues such as housing shortages, skills gaps, transport infrastructure, and digital connectivity. The refreshed strategy also highlights the importance of net-zero goals, sustainable tourism, renewable energy, and green industries, all supported by strong governance, data-driven decision-making, and strategic investment planning.

National Park context

Local Development Plan 2017 - 2021 Delivery Programme 2024

The current Local Development Plan allocates five dedicated economic development sites and eight mixed-use sites that include opportunities for economic activity. Key mixed-use locations include areas adjacent to the Three Villages Hall in Arrochar, Callander Station Road lower car park, Claish Farm in South Callander, the former Salmon Leap in Drymen, the Old Station site in Balloch, a former garage in Lochearnhead, the Clifton site in Tyndrum, and land north of the primary school in Luss.

However, progress on these allocated sites has been limited over the past five years. None of the five economic development sites have been developed or are currently subject to planning applications. Of the mixed-use and visitor experience sites, only Claish Farm has seen partial development, with 50 new homes delivered but no associated economic uses implemented. Some movement has occurred on other sites, with planning applications either approved or pending for the Three Villages Hall site and the site in Luss.

Despite this slow uptake, economic activity has continued on non-allocated sites. The latest monitoring report highlights strong investment in tourism, growth in small businesses, and the expansion of existing enterprises. On average, eight applications per year have been approved under the Economic Development Policy, demonstrating that while allocated sites remain largely undeveloped, wider economic activity within The Park continues to be supported.

Within the National Park there is only one industrial site – Lagrannoch - which is located within Callander.

Business in Scotland 2024

The 'Business in Scotland' data, collected annually, provides the numbers and types of businesses across Scotland by local authority area. As of March 2024, there were an estimated 358,235 private sector businesses operating in Scotland, including 174,085 registered businesses. This represents an increase of 715 registered businesses (0.4%) over the past year – the first annual rise since 2020. The number of small, medium, and large businesses all increased, along with a growth in abroad-owned businesses. SMEs made up 355,805 of the total, providing around 1.2 million jobs and accounting for 55.9% of private sector employment.

The Business in Scotland data is provided by Local Authority area and a breakdown of the numbers of businesses by employee size for each of the Local Authority areas is shown in the table below. Perth and Kinross has not been included in this breakdown as the area of the Local Authority which falls within the National Park is very small and therefore the figures would not be reflective of the National Park context:

	No. of small businesses (0-49 employees)	No. of medium sized businesses (50-249 employees)	No. of large businesses (250+)
Argyll and Bute	3,840 (2010) 3,845 (2024)	95 (2010) 95 (2024)	150 (2010) 160 (2024)
Stirling	3,840 (2010) 3,725 (2024)	135 (2010) 155 (2024)	320 (2010) 315 (2024)
West Dunbartonshire	1,525 (2010) 1,765 (2024)	75 (2010) 55 (2024)	195 (2010) 180 (2024)

In Argyll and Bute, the number of small and medium-sized businesses has remained virtually unchanged between 2010 and 2024, indicating a stable business environment over time. However, there has been a modest increase in the number of large businesses, rising from 150 to 160, which may suggest some growth among higher-scale enterprises in the area.

In Stirling, there has been a slight decline in the number of small businesses, dropping by 115, which could reflect business closures or consolidations. On the other hand, the number of medium-sized businesses has increased notably, from 135 to 155, pointing to expansion of existing businesses or a greater presence of mid-sized firms. The number of large businesses has seen a minor decline, from 320 to 315.

West Dunbartonshire has experienced strong growth in the number of small businesses, increasing from 1,525 to 1,765, which may indicate a rise in entrepreneurial activity or effective local support for small enterprises. However, the number of medium-sized businesses has decreased from 75 to 55. Similarly, large businesses have declined slightly from 195 to 180, possibly reflecting broader economic shifts in the area.

Overall, small business trends vary across the three areas, with stability in Argyll and Bute, a slight decline in Stirling, and strong growth in West Dunbartonshire. Medium-sized businesses show mixed results, with growth in Stirling, stability in Argyll and Bute, and decline in West Dunbartonshire. Large businesses have remained relatively stable, with only minor fluctuations in each area. These patterns may reflect differing regional economic strategies, sectoral strengths, or local challenges affecting business growth and retention.

The Business in Scotland 2024 data also provides information on the different employment sectors across Scotland. Nationally the three largest industry sectors are Professional, Scientific and Technical Activities, Wholesale and Retail Trade and Construction. These account for approx. 29% of all registered private sector businesses.

The Business in Scotland 2024 data includes a breakdown of business numbers by Local Authority area and by urban/rural classification. The table below highlights data specifically for Local Authorities that fall within the Accessible Rural and Remote Rural categories, as these are the predominant classifications for the National Park area.

Local Authority	Accessible Rural	Remote Rural
Argyll and Bute	170	2610
Stirling	1360	345
West Dunbartonshire	80	0

The data shows a clear variation in the distribution of rural businesses across the selected local authorities. Argyll and Bute has a strong Remote Rural business presence, with 2,610 businesses compared to just 170 in Accessible Rural areas, reflecting its

largely remote rural geography. In contrast, Stirling has a significantly higher number of businesses in Accessible Rural areas (1,360) than in Remote Rural areas (345), suggesting a more connected rural economy with better access to urban centres. West Dunbartonshire has a minimal rural business presence overall, with only 80 businesses in Accessible Rural areas and none in Remote Rural areas, indicating a predominantly urban character.

The 2024 data for Stirling Council Local Authority area shows that the top three business types are: Professional and Scientific and technical services (15%), Wholesale and Retail Trade (16%), and Construction (12%).

Accommodation and Food Services is joint forth with Agriculture and Forestry.

The 2024 data for Argyll and Bute Council shows that the top three business types are: Agriculture and Forestry (20%), Wholesale and Retail Trade (15%), Accommodation and Food Services (13%). Construction is forth, around 10%.

The 2024 data for West Dunbartonshire Council area shows that the top three business types area: Wholesale and Retail Trade (21%), Construction (14%) and Professional and Scientific services (10%).

Businesses in the National Park 2022

A more in-depth desk based study was carried out in 2022 into the number and types of business within the National Park.

As of 2022, there were 1,160 businesses operating within the National Park. Although the number of businesses peaked in 2017, the downward trend observed in the following years appears to be reversing in recent data. Several sectors have experienced notable decline, particularly Financial and Insurance Services (-11%), Real Estate (-4%), Transportation and Storage (-3%), and Retail (-1%). For instance, the number of retail businesses fell from 170 to 155, while financial services declined from 10 to just 5 businesses. This trend may reflect broader national challenges facing high streets, with the impact potentially more acute in certain villages within The Park.

Despite these declines, several sectors have shown modest growth. Manufacturing increased by 4%, rising from 30 to 40 businesses; Accommodation and Food Services grew by 1%, from 200 to 220 businesses; Construction also saw a 1% increase, from 95 to 105 businesses; and Education and Social Work Activities increased by 3%. These shifts suggest a growing emphasis on services related to tourism, hospitality, and local infrastructure.

The business landscape of the National Park is dominated by micro-businesses. In 2022, 74% of businesses had between 0–4 employees, and just 1% had more than 50 employees. Notably, all 10 of the large businesses with 50+ employees are in the Accommodation and Food Services sector - a figure that has remained stable since 2015.

Micro-businesses in the primary industries - particularly agriculture, forestry, and fishing - account for 20% of all such enterprises, yet only 2% of total employment. This discrepancy highlights a sector composed largely of sole traders or very small operations, such as individual farms, estates, and forestry-related contractors.

Analysis of the business demographics across relevant Council areas - Argyll and Bute, Stirling, and West Dunbartonshire - reinforces the pattern of small-scale enterprise dominance within the National Park. These areas, particularly Argyll and Bute

and Stirling, host a high proportion of small rural businesses, supporting the assumption that the economy is characterised by numerous small employers and very few large-scale operations.

Employment Data Census data 2022

According to the 2022 Census, Loch Lomond and The Trossachs National Park had a population of 12,567 people aged 16 and over, with 7,067 individuals in employment during the week prior to the census. The employment landscape is characterised by a skilled and diverse workforce, with the most common occupations falling within Professional Occupations (1,455), Skilled Trades (951), and Associate Professional and Technical roles (948). These reflect The Park's strong economic base in specialised trades, technical services, and professional fields. Within the professional category, jobs are concentrated in science and technology (374), healthcare (356), education (259), and public/business services (466). Management roles are also significant, with 903 individuals employed as managers or senior officials, split between corporate and other managerial roles.

Other key sectors include Caring, Leisure, and Other Services (541), where personal care (333) and tourism-related services (206) are prevalent; Sales and Customer Service (417) in retail and other customer-facing roles; Process, Plant, and Machine Operatives (406), including 190 in transport-related roles; and Elementary Occupations (839), primarily in trades (186) and support services (654).

Employment is distributed across 22 industry sectors, with the largest being Accommodation and Food Services (998) - a clear indicator of The Park's reliance on tourism - followed by Human Health and Social Work (787) and Education (656). Other notable sectors include Transport and Storage (615), Wholesale and Retail Trade (511), and Public Administration and Defence (337). Smaller sectors such as mining, utilities, and waste management account for fewer than 70 people each, and the least represented were household employment (9) and extra-territorial bodies (3).

The Park's economy is also defined by a high level of economic activity, with 6,972 people economically active, excluding full-time students. Of these, 5,228 were employees - 3,851 full-time and 1,377 part-time - while 1,594 were self-employed. Among the self-employed, 394 operated with employees (mostly full-time), and 1,200 were sole traders, with about a third working part-time. Unemployment was low, with just 150 people actively seeking work. There were also 274 economically active full-time students, mostly employed part-time.

The economically inactive population totalled 5,321, driven mainly by retirees (4,025, or 76%), reflecting the area's older demographic. Other inactive groups included individuals caring for family (357), long-term sick or disabled (411), non-working

students (311), and 217 citing other reasons. These figures indicate both an aging population and a local economy that supports sole traders, micro-businesses, and flexible working arrangements.

Commuting and work patterns further reflect The Park's rural character and changing workforce trends. Of the 6,873 employed individuals, 2,571 (37%) worked mainly from home, particularly among older age groups - 40% of those aged 50-64 and 51% of those 65 and over. In contrast, younger workers (16-24) were more likely to commute, with only 23% working remotely and most travelling less than 5km.

Short-distance commutes were common: 679 people (10%) travelled under 2km, 335 (5%) between 2-5km, and 365 (5%) between 5-10km. Longer commutes included 631 people (9%) travelling 10-20km and 577 (8%) travelling 20-30km. A smaller proportion travelled over 30km, with 220 commuting 40-60km and 212 commuting more than 60km. Additionally, 1,019 people (15%) had no fixed place of work or worked outside the UK.

Travel to work methods reflected strong reliance on private transport and remote working. Driving a car or van was the most common method, used by 3,177 people (46%). Active and public transport use was low: 527 walked, 199 were car passengers, and only 64 cycled. Public transport was used by 73 bus and 123 train commuters. Very few used taxis (16), motorcycles (9), or the underground (4), and 108 used other or unspecified means.

In terms of educational attainment, the population is relatively well-qualified. Of those aged 16 and over, 4,854 people (39%) held degree-level qualifications or higher, the largest education group. A further 1,590 held sub-degree or further education qualifications (e.g., HNCs or HNDs), 966 had completed apprenticeships, and 3,472 held school-level qualifications (1,446 upper and 2,026 lower). Only 1,681 people (13%) had no formal qualifications.

The data indicates that The National Park has a highly skilled, well-educated, and economically active population, with employment concentrated in tourism, professional services, public sectors, and trades. A strong trend towards home-working and low unemployment reflects a stable, flexible rural economy. The area is also marked by a high proportion of retirees, a relatively low uptake of public transport, and a growing role for self-employment and part-time work - especially among students and small business owners.

Policy 27 – City, Town, Local and Commercial Centres

National context

A New Future for Scotland's Town Centres

A New Future for Scotland's Town Centres" emphasises the critical role of town centres in fostering social, economic, and environmental wellbeing while addressing challenges such as climate change, inequality, and post-COVID recovery. It builds on the 2013 Town Centre Action Plan, updating its vision and recommendations to reflect current realities and ambitions.

The report highlights the importance of towns and town centres as community hubs, offering shared spaces for economic, cultural, and social interactions. It notes that while some progress has been made under the 2013 Action Plan, challenges such as decentralisation, disaggregated development, and inequities persist. COVID-19 has further underscored the need for resilient, inclusive, and sustainable town centres.

Key themes of the review include:

- People: Ensuring accessibility, equity, and inclusivity in town centre planning and activities, while empowering communities through participatory processes.

- Planet: Addressing the climate emergency by promoting sustainable practices, reducing car dependency, and enhancing local resilience through green infrastructure and retrofitting efforts.

- Economy: Reinvigorating local economies by prioritising town centres for investment, encouraging community wealth building, and balancing tax and cost structures to support local businesses.

The review proposes strengthening planning policies such as the Town Centre First Principle, incorporating 20-minute neighbourhood concepts, and fostering partnerships between communities, local authorities, and businesses. It also recommends aligning funding programs to support demonstration projects focusing on climate action, town centre living, and digital development.

Ultimately, the report advocates for a collaborative and place-based approach to ensure town centres meet the diverse needs of their communities while contributing to Scotland's broader goals for a greener, fairer, and more inclusive society.

Town Centre Action Plan Review – Joint Response from the Scottish Government and COSLA 2022

The Town Centre Action Plan Review – Joint Response from the Scottish Government and COSLA (April 2022) outlines a collaborative national strategy for revitalising Scotland's town centres, recognising their vital role in promoting wellbeing, sustainability, economic vitality, and local identity. This response builds on the findings of the independent report *"A New Future for Scotland's Town Centres"*, aiming to transition from policy intentions to practical, community-driven outcomes.

The plan is framed as a national Call to Action, promoting a vision where towns serve the wellbeing of people, the planet, and the economy. It stresses that government alone cannot effect change; instead, success depends on collective effort across local communities, councils, businesses, and third sector organisations. The plan identifies four key action areas: (A) establishing the right policy framework, (B) ensuring appropriate support, (C) creating an investment framework, and (D) working closely with partners.

Actions include updating planning frameworks to prioritise sustainable, town-centre-first development, reforming tax and fiscal policies to support local businesses, encouraging town centre living and 20-minute neighbourhoods, and promoting digital inclusion and climate resilience. Specific investments are proposed for affordable housing, green infrastructure, digital connectivity, and community ownership. The plan also emphasises measuring progress through improved data and evaluation methods.

Ultimately, the plan calls for a holistic, place-based approach that empowers local communities to shape their town centres in ways that reflect their unique needs, histories, and assets.

Town Centre Toolkit

The Town Centre Toolkit is an online resource provided by the Scottish Government to support the regeneration and improvement of town centres across Scotland. It offers guidance, practical tools, and case studies to help communities, businesses, local authorities, and developers create vibrant, sustainable, and resilient town centres.

Principles for Town Centre Renewal:

- Encourages collaboration between local authorities, businesses, and communities.
- Promotes a people-first approach to town centre design and management.
- Focuses on sustainability and adaptability to future challenges.

The toolkit aligns with Scotland's Town Centre Action Plan, which prioritises community engagement, economic growth, and sustainability. It serves as a practical resource for anyone involved in town centre development, helping them make informed decisions to create thriving town centres.

National Park context

Scotland's Towns Partnership, Understand Scottish Places

The *Understanding Scottish Places (USP)* platform, commissioned by the Scottish Government, was launched in April 2015 to provide insights into the characteristics and relationships of towns across Scotland. Instead of ranking towns as better or worse, USP highlights their shared attributes.

The platform has been updated since it was first launched in 2018 and now includes a Connectivity and Environment Assets section. This added new descriptive indicators, including average download speed, greenspace per 1,000 residents, and buildings at risk. A new Change Section was also introduced, featuring population trends, migration rates, and job changes.

The platform does not produce data for all Towns across Scotland but it does have detailed information for Callander. A summary of the output from this source is detailed below:

Callander, located in Stirling Council, is an 18th-century planned town known as the gateway to the Trossachs and has been a significant tourist destination since the time of Sir Walter Scott. With a population of 3,077, Callander is characterised by a diverse demographic mix, including a high proportion of older couples without children. The local economy is composed of both professional and non-professional jobs, with self-employment and part-time work playing a vital role.

The town is classified as interdependent to independent, meaning it has a degree of economic self-sufficiency but also relies on nearby areas. Compared to similar towns, Callander has a higher number of charities, hospitals, jobs, shops, GP services, and a diverse retail sector. However, it has fewer public sector jobs and children in primary and secondary schools, with a notable difference in commuting distances.

Between 2001 and 2011, Callander's population grew by 6%, a faster rate than similar towns. However, job numbers declined by 7% from 2009 to 2014, indicating economic shifts. Employment is distributed across various sectors, with significant representation in public administration, health, retail, and accommodation services. A mix of professional and skilled manual workers is evident, with education levels ranging from no formal qualifications to university degrees.

The town has strong connectivity and environmental assets, with above-average download speeds (23 Mbps) and extensive green spaces per capita. Callander's charity sector is less prominent than in comparable towns, with fewer residents per charity and receiving lower grant funding. In terms of travel, most residents commute relatively short distances, though a higher proportion travel longer distances for work compared to similar towns.

Overall, Callander is a vibrant, economically diverse town with a strong tourism base and a mix of independent and interdependent characteristics. Its historic appeal, natural beauty, and service sector make it a key destination within Scotland, but economic and employment challenges remain.

Network of Centres

A network of centres refers to the interconnected hierarchy of towns, villages, and neighbourhood hubs that provide access to goods, services, and community facilities. Central to National Planning Framework 4 (NPF4), this concept supports sustainable, place-based development, 20-minute neighbourhoods, balanced urban-rural growth, and reduced car dependency. Networks typically include city, town, local, and commercial centres, though the latter are less prioritised. The new Local Development Plans will use this framework to identify service gaps, guide investment, and ensure development supports both community needs and environmental goals.

The map in figure 2 of the appendix shows the main settlements within the National Park, and the map in figure 1 details the current development strategy from the National Park Partnership Plan 2024 – 2029. The categorisation of settlements for the new Local Development Plan is yet to be determined. To support this process, an additional map is provided highlighting all settlements within The Park boundary.

Clustering of Non-retail Facilities

NPF4 requires LDPs to be informed by evidence on where clustering of non-retail uses may be adversely impacting on the wellbeing of communities.

We acknowledge that these are working drafts currently, and we are sourcing information on this topic. We anticipate that this will be available before the Evidence Report, which this Topic Paper will form part of.

Policy 28 – Retail

National context

Getting the Right Change – A Retail Strategy for Scotland

The Scottish Government published a document in 2022 titled *"Getting the Right Change: A Retail Strategy for Scotland"*. It outlines Scotland's vision for a successful, resilient, sustainable, and inclusive retail sector. It aims to strengthen retail's role in the economy while addressing challenges such as the COVID-19 recovery, climate change, and economic inequality. The strategy is structured around four key themes: Sector, People, Place, and Just Transition.

Sector - The strategy emphasises increasing productivity, innovation, and entrepreneurship in the retail sector. It identifies opportunities for growth through technological advancements, digitalisation, and sustainable practices. Initiatives include support for local supply chains, the promotion of Scotland's produce, and improved digital capabilities for retailers.

People - Fair work and skills development are at the centre of the strategy's vision for the workforce. It seeks to reduce in-work poverty, close gender and ethnicity pay gaps and promote secure employment. Measures include skills audits, training programs, and commitments to fair wages and working conditions.

Place - The document underscores the importance of retail in creating vibrant communities. It advocates for a place-based approach to planning, integrating retail into "20-minute neighbourhoods" and encouraging localism. Efforts include revitalising town centres, repurposing vacant retail spaces, and fostering local economic benefits through community wealth building.

Just Transition - Scotland aims to achieve a net-zero retail sector by 2045. The strategy highlights the role of circular economy practices, sustainable transport options, and reducing carbon footprints in retail operations. Specific measures include deposit return schemes, restrictions on single-use plastics, and incentives for adopting environmentally friendly business models.

This comprehensive approach positions retail as a cornerstone of Scotland's broader goals for economic transformation, sustainability, and social equity.

Scottish Local Shop Report 2023

The *Scottish Local Shop Report 2023*, produced by the Scottish Grocers' Federation (SGF) and the Association of Convenience Stores (ACS), provides a comprehensive overview of the convenience store sector in Scotland. It highlights the sector's economic contributions, employment, services, and role in supporting local communities.

There are over 5,170 convenience stores in Scotland, employing more than 49,000 people. The sector contributes £10.6 billion in gross value added (GVA) annually and over £9 billion in taxes. Scottish convenience stores invested £62 million in 2023, focusing on refrigeration, signage, technology, and sustainability measures like LED lighting and smart meters.

Convenience stores are essential in rural, urban, and suburban settings, offering vital services such as bill payment (76%), free cash machines (47%), and local grocery delivery (26%). They play a significant role in community engagement, with 81% of independent retailers participating in activities like charity fundraising, food bank donations, and local event sponsorship.

The sector also addresses inclusivity, with many stores providing wheelchair access (70%) and wide aisles (62%). Sustainability is a growing focus, with stores adopting renewable energy measures like solar panels and chiller doors.

Overall, the report underscores the sector's critical role in supporting Scotland's local economies, providing essential services, and fostering vibrant, sustainable communities.

Out of Home – Scotland 2021

The document is a comprehensive market analysis prepared for Food Standards Scotland, examining Scotland's out-of-home (OOH) food and drink consumption in 2021. It uses data from a demographically representative panel of Scottish consumers to understand behaviours, trends, and spending across various channels, such as quick service restaurants (QSRs), full-service restaurants, cafes, and convenience stores. The OOH market in Scotland saw partial recovery in 2021 from the sharp decline in 2020, but activity remained below 2019 pre-pandemic levels. Quick service restaurants were the only channel to experience growth compared to 2019, largely due to their strong takeaway and delivery infrastructure.

Consumer behaviour shifted, with individuals aged 35-54 showing the greatest drop in OOH trips, while those aged 55 and over showed the smallest. Consumers in lower socio-economic groups made more OOH trips than higher-income groups, especially to QSRs and convenience stores, but spent less per trip. Motivations for eating out skewed increasingly toward practicality-such as ease, speed, and accessibility.

Consumption patterns showed that while all food and drink categories declined in volume since 2019, main meals were the least impacted, and snacks (particularly savoury snacks and cold drinks) the most. The most common OOH categories were coffee and sandwiches.

The takeaway and delivery segment experienced a boom, with delivery trips more than doubling since 2019. Technology played a significant role in this growth, with consumers increasingly using restaurant apps and aggregators like Just Eat and Deliveroo.

Consumers living in rural areas were found to visit OOH venues more frequently than their urban counterparts, averaging 185 trips per person, which is higher than the 135 trips per person seen in urban areas. This represents an 8% increase in rural trips compared to 2020. Despite visiting more often, rural consumers spent less per trip, with an average of £4.82, compared to £6.13 for urban consumers. In terms of the types of outlets visited, rural consumers had a higher share of trips to bakery and sandwich shops as well as coffee shops and cafes.

Overall, while rural residents in Scotland were fewer in number, their habits showed a consistent and high engagement with OOH food and drink services, but with a preference for different venue types and generally lower spend per visit compared to urban dwellers.

National Park context

Local Development Plan 2017 – 2021

The Local Development Plan currently includes only one retail allocation: Callander RET1 Stirling Road, previously designated for a supermarket. This allocation remained undeveloped for over seven years despite active marketing, leading to its repurposing for a 50-bed care home following a retail impact assessment. The assessment highlighted a lack of viability for retail use at the site and potential harm to the vitality of Callander town centre. The care home was approved in response to a demonstrated local shortfall in care spaces and the needs of an aging population.

Several mixed-use allocations incorporate retail elements, including Callander MU1, Arrochar MU1, Drymen MU1, Blairmore VE1, and Tarbet VE1, among others. These projects aim to blend retail with other uses, such as housing, tourism, and community spaces, to support local economies and improve community amenities.

Between 2017 and 2021, retail development activity was limited. Notable developments included the relocation and expansion of cooperative supermarkets in Killin and Callander. Proposed retail units at Luss and Balmaha remain undeveloped, potentially due to the COVID-19 pandemic. Planning data suggests businesses often prefer using properties they already own rather than

renting vacant units, though exceptions have been made for small-scale local craft sales where vacant units were financially unviable.

Safeguarding retail spaces remains a priority. Over five years, 12 instances of change of use from retail to non-retail were approved, primarily converting to cafes, professional services, or housing. These changes occurred mostly in Callander and Killin, with pre-application data indicating increasing pressure to convert retail spaces into residential or tourism uses. Callander has shown resilience, with new businesses opening in previously vacant units, often transitioning to cafes or food shops. In contrast, Killin faces higher risks, with persistent vacancies and fewer proposals for alternative uses.

Retail Provision

Retail development plays an important role in supporting the vitality and viability of settlements within the National Park, contributing to the sustainability of the wider rural economy. As outlined in The Park's development strategy, both large and small settlements serve a crucial function in meeting the day-to-day shopping needs of residents while also offering a variety of retail opportunities for visitors and tourists. Due to the scale and character of these settlements and the predominantly rural setting, retail provision is expected to remain small in scale, focused on supporting local communities and enhancing tourism-related economic activity.

The five towns and villages within the National Park which act as a hub and provide a main street retail offering are: Balloch, Callander, Aberfoyle, Drymen and Killin.

Policy 29 – Rural Development

National context

Scottish Government Urban Rural Classification 2020 (www.gov.scot)

The Scottish Government's Urban Rural Classification provides a consistent way of defining urban and rural areas across Scotland. The classification is based upon two main criteria – population and accessibility. The classification is available in multiple forms, including a 6-fold classification which distinguishes between urban, rural and remote areas through six categories

and an 8-fold classification which further distinguishes between remote and very remote regions. It is an important classification that informs the application of some NPF4 Policies. The detail of the 6-fold classification is included in the table below:

Class	Class Name	Description
1	Large Urban Areas	Settlements of 125,000 people and over
2	Other Urban Areas	Settlements of 10,000 to 124,999 people.
3	Accessible Small Towns	Settlements of 3,000 to 9,999 people, and within a 30 minute drive time of a Settlement of 10,000 or more
4	Remote Small Towns	Settlements of 3,000 to 9,999 people, and with a drive time of over 30 minutes but less than or equal to 60 minutes to a Settlement of 10,000 or more
5	Accessible Rural Areas	Areas with a population of less than 3,000 people, and within a drive time of 30 minutes to a Settlement of 10,000 or more.
6	Remote Rural Areas	Areas with a population of less than 3,000 people, and with a drive time of over 30 minutes but less than or equal to 60 minutes to a Settlement of 10,000 or more.

Each local authority that covers the National Park varies in it's geographic and population distribution and the table below highlights the percentage of population in each 6-fold Urban Rural category:

Local Authority	Large Urban	Other Urban	Accessible Small Towns	Remote Small Towns	Accessible Rural	Remote Rural
Argyll and Bute	0	17.7	4.3	30.4	4.4	43.2
Stirling	0	53.1	13.2	0	29.5	4.3
Perth and Kinross	1.2	31.2	11	10.9	35	10.9
West Dunbartonshire	47.6	51.1	0	0	1.2	0
Scotland	**37.8**	**33.9**	**8.6**	**2.6**	**11.6**	**5.5**

The map in figure 3 of the appendix has been prepared to correspond to the 6-fold Urban Rural category and shows that Loch Lomond and the Trossachs National Park Authority is covered primarily by accessible rural and remote rural.

National Park context

Loch Lomond and the Trossachs Local Development Plan

The current Local Development Plan identifies five Rural Activity Areas designated to support rural business development. These include Callander East, Drymen South, Acharn Biomass Plant in Killin, Strathfillan (focusing on economic activities linked to Scotland's Rural Research Centre at Auchtertyre and Kirkton Farms), and Strachur South, which is intended for new and expanded rural businesses at the Balliemeanoch sawmill.

The plan also allocates five economic development sites and eight mixed-use sites that incorporate economic development opportunities. Notable mixed-use sites include the area adjacent to the Three Villages Hall in Arrochar, Callander Station Road

lower car park, Claish Farm in South Callander, the former Salmon Leap in Drymen, the Old Station site in Balloch, the former garage in Lochearnhead, the Tyndrum site at Clifton, and the site north of the primary school in Luss.

Over the past five years, there has been limited progress in developing these allocated sites. None of the five designated economic development sites have been developed or are currently subject to planning applications. Among the visitor experience and mixed-use sites, only Claish Farm has been partly developed, with 50 new homes constructed but no economic uses implemented. There has been movement on a few sites, including pending or approved applications for the Three Villages Hall, the site north of the primary school in Luss.

Despite slow progress on allocated sites, there has been economic development activity on non-allocated sites. The monitoring report indicates strong investment in tourism and some growth in smaller businesses, as well as the expansion of existing enterprises. On average, the Economic Development Policy has facilitated eight approvals annually, reflecting continued economic activity beyond the allocated sites.

Rural Population Data

The 2022 Census estimates the population of Loch Lomond & The Trossachs National Park at 14,566, with projections indicating a 7% decline by 2043, reducing the total to 13,667. This projected decrease is largely driven by an ageing population, with the number of children expected to fall by 25% and working-age residents by 14%, while those of pensionable age are projected to increase by 17%. Over the same period, deaths are expected to exceed births, and net migration is anticipated to have a neutral effect on overall population numbers.

Between 2011 and 2021, population trends across the National Park varied significantly by area. Many settlements experienced declines, particularly among younger and working-age groups. For example, Lochgoilhead, Carrick Castle, and Ardentinny saw a 7.95% population decline, while Arrochar, Tarbet, and Ardlui declined by 8.78%, both driven by losses in working-age and youth populations. Callander saw a 4.06% decline overall, Kilmun, Blairmore, and Strone declined by 5.56%, and Crianlarich and Tyndrum by 8.11%, with the latter experiencing a 54.05% drop in young people. Balloch also saw a 5.46% overall decline, mainly due to a significant drop in working-age residents.

In contrast, some areas recorded modest population growth, primarily due to increases in older residents. Croftamie saw the largest growth at 16.1%, driven by a 50% rise in the over-65 population. Kilmahog and Brig o' Turk grew by 15.62%, also reflecting a strong increase in older residents. Other areas such as Luss, Arden and Glen Fruin (+5.12%), Balmaha and Milton of Buchanan

(+5.32%), Killin (+3.99%), and Comrie and St Fillans (+2.83%) also experienced growth, typically associated with a rising pension-age population.

These trends point to a growing demographic imbalance within the National Park, with a shrinking younger population and increasing numbers of older residents. This shift presents significant challenges for long-term community sustainability, particularly around housing, employment opportunities, and the provision of services for an ageing population.

Policy 30 – Tourism

National context

Scottish Tourism Strategy (Scotland Outlook 2030)

Scotland Outlook 2030 outlines a comprehensive vision for Scotland to become a global leader in 21st-century tourism. Developed through extensive collaboration with industry stakeholders, government bodies, and local communities, the strategy emphasises sustainable growth, inclusivity, and innovation in the tourism sector. It positions tourism as a powerful force to enhance Scotland's economy, environment, and social wellbeing.

The strategy envisions Scotland as a world leader in responsible and sustainable tourism, prioritising people, places, businesses, and experiences. It emphasises enriching visitors' experiences while delivering economic and cultural benefits to communities.

The document outlines four Strategic Priorities:

1. Passionate People: Building a skilled, diverse, and valued tourism workforce while promoting fair work practices and career development.

2. Thriving Places: Managing tourism sustainably to benefit communities, protect natural and cultural assets, and enhance connectivity and infrastructure.

3. Memorable Experiences: Offering authentic, high-quality visitor experiences that encourage longer stays, seasonal dispersal, and exploration beyond traditional destinations.

4. Diverse Businesses: Supporting resilient and innovative businesses that adopt sustainable practices and leverage emerging technologies.

The strategy aligns with Scotland's net-zero emissions target by 2045, focusing on reducing tourism's environmental impact through green practices, resource efficiency, and community-driven development.

Achieving the strategy's vision requires progress in six key areas: digital innovation, policy alignment, investment, transport and digital connectivity, business networking, and effective global positioning.

The strategy highlights the importance of collaborative governance and stakeholder engagement, ensuring alignment between local, regional, and national priorities. It proposes regular monitoring, evaluation, and adaptation to respond to evolving challenges and opportunities.

Food Tourism Action Plan for Scotland

The *Food Tourism Action Plan for Scotland* outlines an ambitious strategy to position Scotland as a globally recognised food tourism destination by 2030. This initiative is a collaboration between Scotland Food & Drink, the Scottish Tourism Alliance, and the Scottish Government. It aims to unlock a £1 billion growth opportunity by integrating Scotland's food and drink sectors with tourism to deliver sustainable economic benefits, support rural communities, and celebrate the nation's cultural and culinary heritage.

The plan focuses on five key pillars:

1. Sustainable Local Food Supply Chain: Strengthening connections between food producers and tourism businesses while enhancing the availability of local food and drink to meet increasing demand.

2. Quality Products and Experiences: Delivering high-quality, memorable food tourism experiences rooted in Scottish ingredients, culture, and heritage.

3. Rich Storytelling: Using compelling narratives about Scotland's food, drink, and traditions to attract and engage visitors.

4. Skilled and Vibrant Workforce: Developing training and career pathways to create a passionate and skilled workforce dedicated to food tourism.

5. Innovative Collaboration: Encouraging partnerships across sectors and regions to create unique and marketable food tourism experiences.

The plan includes 17 targeted actions, such as evolving quality assurance programs, establishing food tourism apprenticeship schemes, and creating a national marketing framework. It emphasises agritourism, local sourcing, and leveraging Scotland's natural and cultural assets to provide authentic experiences.

Implementation requires collaboration across public, private, and non-profit sectors, with leadership from a National Food Tourism Board and regional clusters. The plan underscores the importance of sustainability, inclusivity, and community engagement in building a resilient and globally competitive food tourism sector. Through these efforts, Scotland aims to cement its reputation as a "Land of Food and Drink," offering world-class experiences that benefit visitors and local communities alike.

Marine Tourism Strategy

"Giant Strides: A Strategy for Scotland's Marine Tourism 2020-2025" outlines a vision to position Scotland as a global leader in sustainable marine tourism by 2025. This strategy builds on the previous framework, *Awakening the Giant*, emphasising sustainability, community benefits, and economic growth. It aims to increase the sector's economic contribution to over £500 million annually while addressing modern challenges like climate change and evolving consumer expectations.

The strategy is structured around four key themes:

1. Our Waters: Promoting stewardship of Scotland's natural marine environment through investment in natural capital, wildlife protection, waste reduction, and achieving net-zero emissions. Infrastructure like piers, pontoons, and harbours will be developed sensitively to balance environmental and community needs.

2. Our Experiences: Focusing on providing seamless, authentic marine tourism experiences that meet changing consumer demands while leveraging opportunities in low-carbon and circular economies.

3. Our Businesses: Supporting profitability and sustainability in marine tourism businesses by enhancing collaboration, innovation, and marketing, and optimising the ecosystem of business support.

4. Our People and Communities: Highlighting the importance of skilled leadership and community engagement to make marine tourism a career of choice and a force for good in supporting local communities and wellbeing.

The strategy emphasises collaboration among stakeholders through a Partnership Plan that aligns activities with national and international sustainability goals, such as Scotland's National Performance Framework and the UN Sustainable Development Goals. By fostering partnerships, encouraging innovation, and focusing on place-based approaches, *Giant Strides* seeks to drive long-term economic growth, environmental conservation, and community benefits, making marine tourism a cornerstone of Scotland's sustainable future.

Scottish Agritourism Strategy for Sustainable Growth

The Scottish Agritourism Strategy for Sustainable Growth outlines a long-term vision for developing agritourism as a key sector within Scotland's rural economy. The strategy aims to create 1,000 agritourism enterprises by 2030, with at least half offering a food and drink element. It emphasises a high-quality, authentic visitor experience centred around agriculture, local food, and rural heritage while ensuring economic sustainability for family farms and crofts.

Agritourism is defined as a tourism or leisure activity on a working farm, croft, or estate that produces food, setting it apart from general rural tourism. The strategy identifies agritourism as a significant growth opportunity, helping farms diversify income streams while boosting rural economies, combating depopulation, and preserving Scottish landscapes. It also highlights its role in promoting food heritage, addressing gender imbalances in farm ownership, and enhancing community well-being.

The strategy outlines five key priorities:

1. Attracting and retaining a skilled workforce, reversing rural depopulation.

2. Developing a thriving, responsible sector, including potential policy support for agritourism classification.

3. Providing high-quality, market-driven experiences, ensuring alignment with consumer demand.

4. Building financially sustainable businesses that support Scottish agriculture.

5. Expanding food and drink offerings, strengthening the link between tourism and Scotland's food sector.

Overall, the strategy presents a coordinated approach to making Scotland a global leader in agritourism, ensuring its economic, social, and environmental sustainability while enriching visitors' experiences with Scotland's rich agricultural traditions.

Scotland Resident's Views on Tourism 2021

Scotland Residents' View on Tourism 2021 explores attitudes toward tourism with a specific focus on responsible tourism, sustainability, and post-pandemic trends. Conducted by VisitScotland, the survey captured the perspectives of a representative sample of Scottish residents, revealing key insights into behaviours, concerns, and opportunities related to tourism within Scotland.

The findings highlight a growing awareness of climate change, with 73% of residents identifying it as an immediate and urgent problem. The COVID-19 pandemic intensified these concerns, with 45% reporting increased motivation to address climate issues. However, while residents claim to value sustainability, a significant gap exists between intention and action, particularly in the context of travel and tourism behaviours.

Key concerns about tourism include its environmental impact, such as litter, threats to wildlife, and overcrowding at popular sites. Encouragingly, many residents expressed a willingness to adopt responsible tourism practices, with 69% open to holidaying off the beaten track and 68% willing to travel off-season. Additionally, 75% preferred supporting independent local businesses like shops and cafes, while 60% sought out establishments sourcing local food and drink.

Despite these positive attitudes, barriers to sustainable travel remain. For example, 38% find it difficult to make sustainable choices on holiday, and only 36% would plan a trip based on public transport routes. Similarly, eco-friendly accommodations ranked low as a priority, with only 38% favouring properties with sustainability credentials. Residents highlighted a need for clearer guidance, such as labelling eco-friendly businesses, to make responsible choices easier.

The report concludes that while Scottish residents are aware of and supportive of sustainable tourism, achieving significant behavioural change requires greater education, improved infrastructure, and stronger incentives for greener travel options. Young Independents and families were found to be the most receptive to sustainable practices, suggesting opportunities for targeted interventions. Overall, the document underscores the importance of aligning tourism strategies with environmental and community well-being goals to support Scotland's responsible tourism aspirations.

Glasgow City Region Strategy

The strategy 2018-2023 is relevant as it covers the area adjacent to the National Park and also West Dumbartonshire Council area which is the southern edge of The Park – Balloch and Gartocharn and also discusses the West Highland Way which starts in East Dunbartonshire before travelling through Stirling Council and into The Park. Its focus is on developing and growing the city region's food and drink sector, attracting an additional 1 million visitors to the region, and developing a shared tourism offer throughout the region, and finally the establishment of regional events. Loch Lomond and Trossachs National Park is promoted as a key attraction in the area (see page 7 of the Strategy).

Argyll and Bute Visitor Strategy 2022-2025

The priorities of the strategy are to emphasis destination hero products – natural environment and wildlife, water-based activity, unique cycling territory, dark skies, excellence in food and drink especially seafood, local whiskey, authentic cultural experiences and health and wellbeing opportunities with a range of accommodation including options for motorhomes and wild camping.

- Extending the season and spreading visitors across the destination by new campaigns – cosy retreats in wintertime.

- Reaching new audiences via marine and coastal tourism, events and festivals, travel trade markets – moving from coach tours to small groups on tailored itineraries - activity and adventure – action including new cycling routes, local food and drink trails, luxury breaks and wellness/spa, and also wildlife and nature breaks.

- Improving the offer – including skills development

- The journey to net zero – changing business practices and build on staycation activity that rose during Covid-10. Support Scotrail investment in the Glasgow-Oban line.

Perth and Kinross Tourism Action Plan 2021-2025

The Action Plan main outcome is to attract, develop and retain skilled, committed, diverse and valued workforce, create a sustainable destination and the very best, authentic and memorable experience and build on resilience, sustainability and profitability. There are actions relation to visitor management and the Rural infrastructure fund. There is an action to assess

feasibility of development a Strategic Waste Disposal Network for campervans/motorhomes utilising Council public assets and develop ev charge point network.

National Park context

Local Development Plan Monitoring 2024 – Visitor Experience and Tourism Accommodation Trends

The current Local Development Plan designates 13 visitor experience sites and 8 mixed-use sites that include visitor opportunities such as Claish Farm in Callander, the Old Station site in Balloch, and Tarbet Village Green. Visitor experience developments range from tourism accommodations and activity-based attractions to infrastructure like visitor centres, adventure parks, or public amenities. The Visitor Experience Planning Guidance outlines the various types of permissible developments.

Over the last five years, there has been limited progress on allocated visitor experience sites. Notable vacant or derelict sites with no movement include Dumbeg Quarry in Drymen, the old Tourist Information Centre and Harvey's Garage in Tarbet, and Auchenlaich in Callander. However, some sites have seen pending or approved applications, including Tarbet Central Green, and Ben Arthur in Arrochar. The site north of Luss Primary School has been approved for retail and light industrial use rather than visitor experience development.

Over the course of the Local Development Plan period, there has been a consistent decline in planning approvals for tourism developments, continuing into 2024.

This downward trend is reflected in the number of approved self-catering accommodation units, which, at just 32 units in 2024, represents the lowest annual figure since the plan period began in 2017.

The total number of self-catering holiday units approved in 2024 is comparable to 2023 (27 units), both marking a clear drop from the higher approval levels seen in 2021 and 2022 – years that aligned with recovery from the COVID-19 pandemic.

Between 2017 and 2024, there has been a consistent level of planning approvals for tourism accommodation. The monitoring report presents cumulative figures by accommodation type, offering a clear overview of trends and the distribution of approvals across different forms of tourist accommodation. Over the past eight years that has been:

- 257 self catering buildings approved,
- 164 self catering caravans approved,

- 420 bed spaces in serviced accommodation approved,
- 90 pitches for camping/motorhomes approved

Between 2017 and 2024, approvals for tourism accommodation have remained relatively steady, with notable variation across accommodation types. Hotel and bunkhouse approvals fluctuated, reaching a peak in 2019 with 188 new bedspaces, and falling to a low in 2021 with just 6 bedspaces approved. Many of these approvals involved extensions to existing hotels, including the Courie Inn in Killin, The Lodge in Lochgoilhead, Glenview in Luss, Rowardennan Hotel on Loch Lomond, Cameron House in Balloch, and Monachyle Mhor Hotel in Balquhidder. New hotel and hostel developments approved during this period included Bellavista in Balloch (now completed), Blair Cottage in Balmaha (now operating as Birchwood Guest Lodge, also completed), Lochwood in Lochgoilhead (completed), Lochiel House in Callander, and Bonnie Banks in Balloch.

Approvals for non-serviced accommodation – such as self-catering units and caravans – remained relatively stable over the monitoring period, with peak years in 2017 and 2022, when 89 and 87 units were approved respectively. In contrast, approvals for camping pitches showed more fluctuation, with some years recording no approvals at all. The peak occurred in 2021 with 46 camping pitches approved, while no approvals were recorded in either 2023 or 2024.

Holiday Park & Small-Scale Developments:

- Only one major holiday park application was approved in the last five years – the redevelopment of the Former Highland Way Hotel for 23 units.

- A medium-sized project for 8 units at Ballagan Farm was also approved.

- Several existing sites expanded, including Portnellan, Ardlui Retreat, Tigh Mor Trossachs,

- Small-scale holiday developments accounted for 8 applications, totalling 24 units, including sites like Carrick House, Buchanan Smithy, and Claddoch Farm.

The majority of new tourism developments are expansions of existing businesses (58% of approvals, rising to 66% outside the small-scale tourism opportunity area).

The map in figure 4 of the appendix (*Tourism Approvals and Completions between 2017 – 2021)* shows the tourism applications over the Local Development Plan period 2017 - 2021 and highlights the concentration of tourism applications in the eastern and southern parts of The Park, as well as around Lochgoilhead - one of the most pressured visitor areas. Outside designated

tourism opportunity zones, approvals are mostly business expansions, farm diversifications, or developments within or near villages.

- West Highland Way: Growth in glamping sites catering to walkers and short-stay visitors from Glasgow.

- Countryside Applications: Nearly all approvals are for business expansions or farm diversification. Some, like Lennox of Loch Lomond Glamping, have limited sustainable transport options. Balvalachlan in Callander was initially approved as a steading conversion but later expanded under the existing business expansion policy, which could be a loophole for new rural businesses.

- Town/Village Developments (and walking distance from town/village): Despite LDP support for larger-scale projects in and around villages, there has been limited interest in major tourism developments. Only Ballagan (Balloch) and Gart Lodge (Callander) have approvals for around 8 holiday units.

Tourism accommodation development within Loch Lomond & The Trossachs National Park has experienced modest growth, with most new developments coming from business expansions rather than new enterprises. The hotel sector has seen some recovery, though the pandemic impacted completions. Self-catering approvals have declined compared to previous years, and major holiday park developments remain limited. Moving forward, improving uptake of allocated visitor experience sites remains a key challenge, with many designated sites seeing little or no development activity.

Scottish Visitor Survey 2023 – Loch Lomond and the Trossachs Fact Sheet

The document provides insights from the *Scotland Visitor Survey 2023* produced by VisitScotland, focusing on visitors to Loch Lomond and The Trossachs National Park). Key findings highlight visitor demographics, behaviour, and experiences, offering valuable data for understanding tourism trends in the region.

Visitor Demographics:
- The average travel party size visiting The Park was 2.7 people, with 10% of parties including children under 16.
- 12% of visitors travelled with pets, reflecting a demand for pet-friendly facilities and experiences.

Visitor Profiles:

- The majority of visitors were from the UK, but there was also significant international interest, aligning with broader trends in Scotland's growing appeal to global travellers.
- The document captures preferences and behaviours across different visitor groups, such as day visitors and overnight tourists.

Tourism Patterns:

- The survey provides details on the activities pursued by visitors, emphasising the popularity of outdoor activities such as hiking and sightseeing.
- Spending patterns, accommodation choices, and motivations for visiting The Park are analysed to provide a holistic view of the visitor experience.

Experience and Satisfaction:

- Visitors' feedback highlights a high level of satisfaction with their experiences in The Park, particularly regarding its natural beauty and outdoor recreational opportunities.
- Opportunities for improvement in areas such as infrastructure, visitor facilities, and accessibility are identified, helping stakeholders address any gaps.

Impact on the Economy:

- The data reinforces the economic importance of tourism in LLTNP, with visitor spending contributing significantly to local businesses and services.

In conclusion, the findings of the Scotland Visitor Survey 2023 underline the popularity of Loch Lomond and The Trossachs National Park as a destination. They also provide actionable insights for enhancing visitor experiences and maximising the area's tourism potential.

Loch Lomond and the Trossachs STEAM Report 2024

The Loch Lomond & The Trossachs National Park Final STEAM Report (2024) provides an in-depth analysis of tourism trends, visitor numbers, economic contributions, and employment impacts related to tourism in the National Park. The STEAM

(Scarborough Tourism Economic Activity Monitor) methodology quantifies tourism's local economic impact using visitor data, accommodation statistics, and sectoral multipliers.

Visitor Numbers and Trends

The report highlights that in 2023, 4.53 million visitor days were recorded in The Park, representing a 7.8% increase from the previous year. Visitor numbers also increased, reaching 2.76 million, a 12.9% rise from 2022. This growth was primarily driven by a rise in both day visitors and overnight stays, with particular increases in non-serviced accommodations such as self-catering lodges and holiday rentals.

A key trend noted in the report is the seasonal distribution of visitors. The Park experiences peak visitation during the summer months (June-August), with notable spikes during school holidays and weekends. However, off-season tourism (October-March) is also growing, particularly among international tourists and outdoor recreation enthusiasts. This shift aligns with national trends indicating greater year-round engagement in outdoor activities.

Economic Impact of Tourism

Tourism remains a major economic driver for the National Park. In 2023, direct visitor expenditure reached £384.88 million, marking a 19.6% increase from 2022. The total economic impact, including indirect effects, amounted to £540 million, a 20.2% increase year-over-year. These figures underscore the significant role of tourism in supporting local businesses, services, and infrastructure.

Sectoral Contributions and Employment

The tourism industry in the National Park provides substantial employment opportunities, with 6,711 full-time equivalent (FTE) jobs in 2023, reflecting an 8.1% increase from the previous year. The accommodation sector remains the largest employer, accounting for 29.4% of total employment. Other key sectors include food and drink (15.2%), transport (13.8%), shopping (9.5%), and recreation (5.3%).

Indirect employment, which includes supply chain effects, represents 26.7% of total tourism-related jobs, highlighting tourism's broader economic benefits beyond direct service roles.

<u>Visitor Spending and Regional Impact</u>

The spending distribution indicates that accommodation is the largest expenditure category, followed by food and drink, shopping, and recreation activities. The growth in non-serviced accommodations, such as holiday cottages and short-term rentals, suggests a diversification of visitor preferences. Meanwhile, the increasing use of local dining and recreational services contributes to a more evenly distributed economic impact across the region.

<u>Future Considerations</u>

The report suggests that visitor numbers and economic contributions are on an upward trajectory, with further potential for expanding sustainable tourism initiatives. Recommendations include:

- Enhancing infrastructure to support peak-season visitors while maintaining environmental protections.

- Developing off-season tourism offerings, particularly in outdoor and nature-based experiences.

- Addressing workforce challenges in hospitality and tourism sectors through training and employment incentives.

- Improving transportation and accessibility, including sustainable travel options for visitors.

In conclusion, the Loch Lomond & The Trossachs National Park Final STEAM Report (2024) provides a comprehensive overview of tourism growth, economic benefits, and employment trends. The findings emphasise the importance of tourism to the region's economy and the need for strategic planning to ensure sustainable development while preserving The Park's natural beauty and visitor experience.

Short-term letting Distribution

The short-term letting sector in Loch Lomond & The Trossachs National Park was reviewed in July 2022 by Arneil Johnstone as part of housing market research and further cross-checked by the planning team, who identified additional Airbnb properties. Historically, STEAM data did not account for Airbnbs due to difficulties in tracking their availability and occupancy. However, efforts are being made to incorporate this growing sector into future analyses.

The 2021 STEAM dataset, updated with a snapshot from Arneil Johnstone, recorded 3,600 bedspaces (897 units), reflecting a decrease from 3,791 bedspaces in 2003. Further research in 2022 identified a total of 951 short-term let units across the National Park, which will be incorporated into the April/May 2022 end-of-year report.

A snapshot of 2022 data by Community Council Area indicates a high concentration of short-term lets in West Loch Lomond due to large-scale holiday developments such as Cameron House, Loch Lomond Castle Lodges, Carrick Golf Club, and Inveruglas Holiday Park. Of the 269 total units in Luss & Arden, only 32 (12%) would be suitable for permanent residential use. Similarly, Lochgoil (144 units) has a significant number of self-catering properties, largely due to the Argyll Holidays Drimsynie Estate.

In contrast, areas such as Callander (51 units), Trossachs (14 units), and Strathard (75 units) have lower numbers of short-term lets, primarily due to the absence of large holiday parks. However, 56% of these properties (73 units) could be repurposed for residential use.

Community Council Area	Number of Self-Catering Units	Units suitable for residential use
Ardentinny	8	8
Arrochar & Tarbet	65	20
Balloch and Haldane	7	6
Balquhidder, Lochearnhead and Strathyre	111	71
Buchanan	51	11
Callander	51	39
Croftamie	16	1
Drymen	11	5
Gartmore	10	9
Killin	43	26
Kilmaronock	22	13
Kilmun	43	28
Lochgoil	144	35
Luss & Arden	269	32

Port of Menteith	24	0
St Fillans	46	5
Strathard	75	30
Strathfillan	66	11
Trossachs	14	5
Grand Total	**1075**	

The 2022 STEAM dataset records approximately 162 hotels operating within Loch Lomond & The Trossachs National Park, categorised into 13 small B&Bs (renting 1-2 rooms), 85 guest houses (renting 3-6 rooms), 49 small hotels (7-24 rooms, often key village establishments such as The Village Inn in Arrochar and the Tullie Inn in Balloch), and 18 large hotels (over 26 rooms), including chain-operated or coaching hotels like the Best Western in Crianlarich and Cameron House.

Over the past 20 years, approximately 115 guest houses, B&Bs, and hotels have closed, primarily due to business closures, with around 15 converting to self-catering properties and 6 returning to residential use. However, precise closure rates remain unclear due to the lack of recorded closure dates. Bedspace availability has declined by 26% since 2003, when there were 5,698 bedspaces in hotels, inns, and guest houses, compared to 4,207 in 2022, indicating a significant reduction in accommodation capacity within the National Park.

From October 2023, all short-term lets required registration under the short-term licence process, providing a more accurate dataset. This data set is still being obtained from the Local Authorities and this section will be updated accordingly.

Loch Lomond & The Trossachs National Park Visitor Study

The Loch Lomond & The Trossachs National Park Authority has commissioned research to provide an updated estimate on the annual visitor numbers to the National Park. This report is being finalised and will be added to this Topic Report when published in the summer and before completion of the Evidence Report which this Topic Paper will form part of.

Camping Provision

The National Park has designated four Camping Management Zones in high-pressure areas to manage the volume and behavioural impacts of wild camping. Camping Management Zones contain designated "permit areas" where a set number of camping permits are issued. These areas offer a more informal, 'wild camping' experience in high-demand locations within

the National Park and typically have no formal facilities. The map in figure 5 of the appendix details the camping permit areas across the National Park. The permit areas accommodate different types of camping experience. There are 30 areas which are to be used for tents only, there are 6 areas which are only to be used by motorhomes/campervans and a further 4 sites which are for mixed use – tents, motorhomes or campervans.

The National Park Authority maintains a database of all camping and caravan sites across the National Park, totalling 33 sites. Of these, 6 are tent-only sites, with four operated by the National Park Authority, one run by the Rowardennan Youth Hostel, and a privately-owned site at Drymen Camping. There are 11 sites which have pitches for tents, motorhomes and campervans. Of these sites none are owned or operated by the National Park Authority. There are also 17 sites across the National Park which are for motorhome/campervans only and do not accommodate tents, all of these are privately owned.

The campsites which are operated by the National Park Authority are Loch Chon which offers 26 pitches for tents, Loch Achray which offers 17 tent pitches and Inchcailloch which has space to accommodate 12 people per night. Sallochy campsite on the eastern side of Loch Lomond has 21 pitches – 11 located within a central camping area and 10 along the west highland way. In total the National Park offers 76 tent pitches across it's camping locations.

Within the National Park there are also 7 'Stay the Night' locations operated by Forestry and Land Scotland, allowing overnight motorhome parking in designated car parks – these are detailed in the map in figure 5 of the appendix.

Overall camping distribution varies significantly by area. West Loch Lomond, including Arrochar and Tarbet, has limited provision with only two formal campsites (Luss and Glen Loin), no tent-only sites, and few permit areas. East Loch Lomond has a better balance, including three mixed-use campsites, one motorhome-only site, four tent-only sites, and one permit area. Trossachs West and North are better served overall but still lack tent-only sites in the north. Cowal Peninsula and Strathfillan/Glen Dochart have minimal provision, with only one mixed-use site in Cowal and three in Strathfillan, and no tent-only or permit areas - though wild camping remains an option due to the absence of camping management zones. Notably, Crianlarich has no formal campsite provision, highlighting a clear gap in this part of The Park. Overall, while provision is strong in some areas, others - particularly West Loch Lomond, Cowal, and Strathfillan - have limited or no formal options for tent-based camping.

Waste Disposal Facilities

Motorhome waste disposal options are extremely limited across the National Park. There is just one public waste disposal facility, located at the Tarbet site, while all other chemical toilet disposal points are privately managed at the camping and

caravan sites. Only three private sites currently allow public access to their waste facilities for a small fee, creating a significant gap in public waste disposal provision across the National Park. Addressing this shortfall is a key challenge for improving motorhome infrastructure and sustainable tourism in the region.

Public Toilet Provision

The Planning (Scotland) Act 2019 introduced a requirement for Local Development Plans (LDPs) to include policies on the provision of public toilets, ensuring that planning authorities account for public convenience needs. Additionally, the Town and Country Planning (Changing Places Toilet Facilities) (Scotland) Regulations 2020 mandate that large-scale developments over 5,000 sqm or those expected to serve more than 1,000 people must include Changing Places toilets. While few developments within the National Park meet this threshold, it is considered good practice to include Changing Places toilets in visitor hotspots.

At present, the National Park has two Changing Places toilets, located in Aberfoyle and Tyndrum. Public satisfaction with toilet availability has improved, rising from 53% in 2015/16 to 66% in 2019/20, though only a minority rated public toilets as "very good".

There are 25 public toilets across the National Park, supplemented by six comfort schemes - private businesses that allow public access to their toilets. These facilities are managed by various organisations, including local councils, private businesses, and the National Park Authority. Public toilets are available in Balloch, Arrochar, Tarbet, Luss, Inveruglas, Balmaha, Aberfoyle, Callander, Crianlarich, Tyndrum, Killin, and St Fillans, among other locations.

However, gaps in public toilet provision remain, particularly in areas such as:

- Strathyre

- Kinlochard, Stronachlachar, and Inversnaid (some local businesses allow public use, but no official comfort scheme exists).

- Blairmore (café facilities are available but not formally part of a comfort scheme).

- Arrochar, which currently relies on two comfort schemes but lacks permanent public toilets.

- Gartmore and Gartocharn, which have no public toilet facilities.

Some communities, including Carrick Castle and Lochgoilhead, are at risk of losing their existing public toilets.

While public toilet provision has improved, key gaps remain, especially in rural and high-traffic areas. Efforts to expand Changing Places toilets, increase comfort scheme partnerships, and secure funding for new public toilets will be crucial in enhancing the visitor experience and supporting sustainable tourism growth within the National Park.

Strategic Tourism Infrastructure Development Studies (STIDS)

In recent years the National Park Authority have made infrastructure upgrades and improvements a priority in order to better manage areas of visitor pressure. As part of this process, The National Park have developed a Place Programme Delivery Route map and also commissioned Strategic Tourism Infrastructure Development Studies (STIDs) to be completed for fours areas of The Park which experience the highest levels of visitor pressure. The STIDS were developed to identify areas of opportunity and to identify actions to strengthen tourism infrastructure and place quality. A summary of the overarching Delivery Route map and each of the four STID areas has been included below:

Place Programme Delivery Route Map

The Place Programme Delivery Route Map outlines a strategic plan for visitor infrastructure investment across Loch Lomond & The Trossachs National Park. This plan aims to enhance visitor experiences while ensuring sustainability, accessibility, and environmental protection. It aligns with the National Park Partnership Plan 2024-2029, with an indicative extension to 2034, providing a long-term framework for coordinated, multi-year investment.

The Route Map identifies key priority areas for infrastructure development, focusing on West Loch Lomond, Balloch, East Loch Lomond, Strathard & The Trossachs, Callander & Surrounding Areas, and other secondary hubs. These areas experience high visitor pressure and require improvements in facilities, transport connectivity, and environmental management. The investment strategy follows a structured approach that includes feasibility studies, community engagement, and phased funding applications.

For West Loch Lomond, major projects include transforming Tarbet into a sustainable transport hub, upgrading Arrochar Glen Loin for safer visitor access, and enhancing Luss Village to manage tourism impact. Balloch, as a major gateway, will see developments such as the Pierhead Masterplan, a renewed transport hub, and enhancements to Balloch Castle Country Park. East Loch Lomond projects focus on upgrading Conic Hill paths, improving visitor infrastructure in Balmaha and Rowardennan, and introducing seasonal park-and-ride facilities.

In Strathard and The Trossachs, the plan prioritises the Aberfoyle Sustainable Travel Hub, expanded active travel networks, and improved connectivity between key destinations. Similarly, in Callander and Surrounding Areas, the focus is on Station Road Hub for sustainable transport, developing Callander Meadows, and strengthening active travel links to nearby trails and sites.

Investment will be sought for secondary hubs such as Tyndrum, Benmore, Crianlarich, Killin, Lochgoilhead, and St Fillans, with smaller-scale projects aimed at accessibility, public amenities, and nature-based enhancements. The total estimated investment is £16.85 million from 2024-2029, rising to £29.84 million by 2034. Funding will come from a mix of public sector allocations, strategic tourism funds, and partnerships with local authorities, businesses, and third-sector organisations.

The Place Programme Delivery Route Map provides a structured timeline for implementation, balancing short-term improvements with long-term sustainability goals. By following a collaborative, place-based approach, the programme seeks to enhance visitor experiences, reduce environmental impact, and support local communities, making the National Park a more resilient and inclusive destination.

West Loch Lomond STID

This STID focuses on the West Loch Lomond area and specifically interventions at Arrochar and Tarbet which are both Placemaking priority areas. The proposal for Tarbet is to develop a visitor hub with improved accessibility by sustainable forms of transport. This is in line with the Placemaking priority guidance within the LDP and is currently in the process of being implemented. The proposal for Arrochar is similar and it is suggested that Arrochar could benefit from improved visitor facilities and transport access. This work has not yet been started, however the outline brief included within the STID would accord with the Placemaking priorities set out in the LDP.

East Loch Lomond STID

This STID focuses on the area to the east of Loch Lomond and includes suggested interventions for Drymen which has been identified as a Placemaking priority area within the current LDP. The suggested improvements for Drymen are in line with those set out within the LDP and focus on improving a sense of place through enhancements to the Village green. The STID has also noted issues with traffic congestion and active travel access which are suggested areas for infrastructure upgrades. There are no timescales set for this piece of work currently but once it is underway it will fulfil the brief set within the LDP.

This STID focuses on the Strathard and Trossachs area of the National Park which includes Aberfoyle, Strathard, The Trossachs and Port of Menteith. Aberfoyle is also an area designated as a placemaking priority area and the proposal within the STID is in line with the suggested focus areas from the LDP.

Callander STID

This STID focuses specifically on the settlement of Callander and the surrounding area. The study provides an in-depth review of the area and proposes interventions which could improve the area for the local and visitor community. Callander has also been designated as a placemaking priority area within the current LDP and the suggested areas for improvement have been captured within the STID. The STID goes beyond the current LDP and includes suggested proposals.

Policy 32 – Aquaculture

There are 22 lochs (and one lake) including Britain's biggest body of freshwater in the National Park, as well as 39 miles of coastline around three sea lochs and many miles of rivers.

National context

Scotland's National Marine Plan

Scotland's National Marine Plan provides a comprehensive framework for the sustainable management of the country's marine environment, covering both inshore and offshore waters. It is developed in accordance with the Marine (Scotland) Act 2010 and the Marine and Coastal Access Act 2009, ensuring a structured approach to balancing economic, social, and environmental interests within Scotland's seas. The Plan aligns with the UK Marine Policy Statement and integrates land-sea interactions while incorporating input from various stakeholders.

A key element of the Plan is its commitment to sustainability. The marine environment is managed to ensure the long-term protection of biodiversity, habitats, and ecosystems while supporting economic activities such as fishing, aquaculture, renewable energy, and tourism. The Plan adopts an ecosystem-based approach, promoting resilience against human-induced

impacts and climate change. Climate change mitigation and adaptation are crucial considerations, and the Plan incorporates Scotland's Climate Change Adaptation Framework to address environmental challenges.

The Plan also highlights economic opportunities while ensuring responsible marine development. The document identifies strategic objectives, including supporting marine industries, ensuring equitable access to resources, promoting marine conservation, and integrating marine and land planning policies. It sets out specific policies for various sectors such as fisheries, aquaculture, offshore renewable energy, oil and gas, carbon capture and storage, shipping, ports and harbours, tourism, and defence.

Overall, the National Marine Plan serves as a strategic tool to guide sustainable development in Scotland's seas, balancing economic growth with environmental conservation. It seeks to provide a clear, regulated, and integrated approach to marine planning, ensuring Scotland's marine resources are managed effectively for current and future generations.

Vision for Sustainable Aquaculture

The Scottish Government's Vision for Sustainable Aquaculture, published in July 2023, sets out the Scottish Government's long-term aspirations for the finfish, shellfish and seaweed farming sectors, and the wider aquaculture supply chain. The Scottish Government has developed a series of outcomes that will help drive progress towards the Vision by 2045; in key areas such as the environment and biodiversity, consenting, community benefit, business and health and welfare.

The Scottish Government expects science, research and development to play a leading role in aquaculture's sustainable development.

Delivery of the Vision will see communities share in the success of aquaculture. The Scottish Government wants communities to meaningfully contribute to aquaculture planning and to improve and streamline consenting. This will include working with and supporting local authorities to maximise the opportunities and benefits that are available to communities.

Scottish National Adaptation Plan

Scotland's National Adaptation Programme 3, published in September 2024, sets out specific commitments to support the Fisheries and Aquaculture sectors to adapt to the impacts of climate change.

The Scottish Government's Vision for Sustainable Aquaculture includes outcomes related to climate change with an ambition to see the aquaculture sector play its part in Scotland achieving Net Zero emissions. The Scottish Government will continue to support the sector to put in place climate resilience plans to manage the risks of climate change by 2029.

Scotland's Fisheries Management Strategy 2020-2030

Scotland's Fisheries Management Strategy 2020-2030 sets out a long-term vision for managing the country's sea fisheries as part of its Blue Economy approach. The strategy aims to balance environmental sustainability, economic growth, and social well-being while ensuring Scotland remains a world-class fishing nation. It emphasises responsible and sustainable fisheries management, ensuring that marine resources are protected for future generations, while also securing jobs, supporting coastal communities, and promoting innovation in the fishing industry.

The strategy is built on a sustainability-first approach, ensuring that fisheries are managed to maintain biological diversity and ecosystem health while optimising long-term economic benefits. It supports the transition to a net-zero emissions economy, reducing the environmental impact of fishing while fostering economic resilience. The strategy also prioritises safe and fair working conditions, aiming to improve fishing as an attractive and secure career option.

The strategy aligns with Scotland's National Marine Plan and broader international commitments, working towards Good Environmental Status in Scottish waters. It focuses on co-management, ensuring that decision-making is inclusive, transparent, and informed by scientific evidence. This involves active collaboration between the government, fishing industry, and environmental stakeholders to ensure policies meet the needs of all parties.

Scotland's Fisheries Management Strategy 2020-2030 aims to position the country as a global leader in sustainable fisheries management. By integrating science, innovation, and stakeholder collaboration, it seeks to balance the economic, social, and environmental dimensions of fisheries.

FINFISH Aquaculture Sector Plan

The Finfish Aquaculture Sector Plan outlines Scotland's strategy for regulating and managing the finfish aquaculture industry, with a focus on sustainability, environmental protection, and economic growth. Developed by the Scottish Environment Protection Agency (SEPA), the plan aims to ensure the sector complies with environmental regulations while promoting innovation and sustainable practices.

The plan envisions the Scottish finfish aquaculture sector as a global leader in environmentally responsible fish farming. It seeks to balance economic success with environmental sustainability, emphasising efficient resource use, waste reduction, and habitat protection. The key objectives are:

1. Full Compliance – Ensuring all businesses adhere to environmental protection laws.

2. Beyond Compliance – Encouraging businesses to adopt sustainable innovations beyond the legal minimum.

The plan is part of SEPA's "One Planet Prosperity" strategy, aiming to regulate industries in a way that helps Scotland prosper within environmental limits.

The Scottish finfish aquaculture industry has ambitious growth targets, aiming to produce 300,000-400,000 tonnes of fish annually by 2030. However, this expansion must align with sustainability principles, ensuring:

- Lower carbon emissions from energy use and transportation.

- Sustainable fish feed sources, reducing reliance on wild-caught fish.

- Circular economy solutions, including repurposing waste materials.

SEPA will support businesses that adopt greener technologies, such as recirculating aquaculture systems (RAS), renewable energy, and low-impact packaging.

Scotland's Finfish Aquaculture Sector Plan seeks to create a sustainable, well-regulated, and globally competitive aquaculture industry. By enforcing compliance, fostering innovation, and reducing environmental impacts, the plan aims to ensure long-term industry growth while protecting marine ecosystems.

Scottish Wild Salmon Strategy

The Scottish Government's Wild Salmon Strategy provides an overarching framework to tackle the wide range of pressures on wild salmon. It brings together the range of organisations with responsibilities to protect salmon, including District Salmon Fishery Boards, River Trusts, NatureScot and Scottish Forestry.

A Strategy Implementation Plan 2023-2028 identifies collective action for wild salmon across government, business and charitable sectors.

The knowledge, expertise and contribution of partners including Scottish Environment Protection Agency, NatureScot and District Salmon Fishery Boards and Trusts is essential for the delivery of the actions in the Implementation Plan.

In March 2024 the Scottish Government published a report on the progress made in the first year since publication of the Wild salmon strategy implementation plan, showing work has progressed on over fifty of the actions.

Scottish Environment Protection Agency (SEPA) Sea lice risk assessment framework

SEPA commenced the implementation of a new sea lice risk assessment framework to protect wild salmon populations from 1 February 2024. The framework for protecting sea trout populations commenced in March 2025.

SEPA's sea lice risk assessment framework uses a screening model to be implemented under the Water Environment (Controlled Activities) (Scotland) Regulations 2011. To prevent salmonids from experiencing a harmful level of lice SEPA applies an exposure threshold in wild salmon protection zones (narrow or constrained areas of sea, such as sea lochs).

Work is underway to plan the managed transition away from control of sea lice and the risk to wild salmonids through local authority Environmental Management Plans which will be phased out by the end of 2025, and replaced by SEPA's national monitoring strategy.

Scotland's Marine Economic Statistics 2022

In Scotland's Marine Economic Statistics 2022, Argyll and Clyde reported fish landings valued at £28 million, with a corresponding fishing employment headcount of 396 individuals based on vessel registration.

In the distribution of Atlantic salmon production value across Scotland, Argyll and Clyde accounted for 18%, making it the joint-third-largest contributor. The North Coast and West Highlands region, as well as the Shetland Isles, held larger shares in comparison.

For Argyll and Bute, Marine GVA (Gross Value Added) totaled £118 million.

Blue Economy Vision for Scotland

The Blue Economy Vision for Scotland outlines the Scottish Government's long-term strategy to enhance the sustainable use of marine resources while balancing economic prosperity, environmental sustainability, and social well-being. Recognising the increasing importance of the marine environment in addressing climate change, biodiversity loss, and economic challenges, the vision emphasises a shared stewardship approach to managing Scotland's marine assets responsibly. By 2045, the plan aims to establish a thriving blue economy that supports ecosystem health, improved livelihoods, economic growth, and social inclusion.

The document defines the blue economy as the interconnected marine, coastal, and freshwater environments that support various industries, including fishing, aquaculture, tourism, marine biotechnology, energy, and conservation. It highlights the critical role these sectors play in Scotland's economy, particularly for coastal and island communities, and stresses the need for sustainable management to mitigate the negative impacts of human activity on marine ecosystems.

To achieve its vision, the strategy identifies six key outcomes:

1. Healthy Marine Ecosystems – Protecting and restoring marine biodiversity and ensuring sustainable management.

2. Climate Resilience and Net Zero Goals – Decarbonising marine sectors, increasing renewable energy use, and addressing climate change impacts.

3. Innovative and Competitive Marine Industries – Promoting sustainable economic growth in marine sectors while maintaining environmental balance.

4. Sustainable Blue Food Production – Supporting responsible seafood and aquaculture industries to enhance food security and global trade.

5. Thriving Coastal and Island Communities – Ensuring equitable access to marine-based jobs, fair wages, and social inclusion.

6. Ocean Literacy and Public Engagement – Educating the public on the importance of marine resources and encouraging participation in marine governance.

Overall, the Blue Economy Vision for Scotland presents a comprehensive roadmap for leveraging the marine sector's potential while addressing climate challenges, economic resilience, and social equity. It underscores the importance of sustainable stewardship in maintaining Scotland's marine environment for future generations.

National Park context

Marine Scotland – Interactive Map

Loch Goil holds special ecological significance as a Nature Conservation Marine Protected Area (MPA), safeguarding its marine biodiversity and habitats. Similarly, a stretch of Loch Long, from the Torpedo Range to Glenmallan, is designated as Shellfish Protected Waters, ensuring water quality standards that support shellfish farming and maintain ecological balance.

Both Loch Long and Loch Goil are categorised as Category 3 areas according to marine fish farm location guidelines. This classification indicates that these lochs have favourable conditions for managing nutrient loading and benthic impacts - critical factors in maintaining healthy aquatic ecosystems. However, despite this designation, each site must still undergo careful assessment to ensure that localised conditions align with regulatory and environmental sustainability goals.

Guidance on Locations of Marine Fish Farms

The interactive map prepared by the Scottish Government includes guidance on possible locations of future fish farm developments. The guidance is separated into three categories:

- *Category 1 - where the development of new or expansion of existing marine fish farms will only be acceptable in exceptional circumstances*
- *Category 2 - where new development or expansion of existing sites would not result in the area being re-categorised as category 1*
- *Category 3 - where there appear to be better prospects of satisfying nutrient loading and benthic impact requirements*

Within the National Park there are two category three areas – Loch Goil and Loch Long

Shellfish Waters Protected Area

There is one Shellfish protected area within the National Park. It is located at the north of Loch Long.

Active Finfish Sites

Finfish sites in Scotland are farms where fish are raised in the sea or in freshwater. The sites include sea lochs, voes, inlets, and freshwater lochs. While Fish Farms can include any farmed aquatic organism including shellfish, finfish sites only cultivate fish with fins. According to the SEPA data, there are three active finfish sites within the National Park and they are all freshwater sites:

Active Finfish Sites:

- SC for the Ecology and Natural Environment

- Trossachs Trout Ltd.

- Loch Earn

Wild Salmon Protection Zones

There are two Wild Salmon protection areas within the National Park. The first is Loch Goil and the second is Loch Long.

Active Fishery Sites

An active fishery site is a pond or other installation where farmed fish are stocked for recreational fishing (either private or commercial). Within the National Park boundary there are sixteens sites across the National Park:

- Loch Lomond Golf Club Lochan

- Blairmore Fishery

- Muir Park Reservoir

- Lake of Menteith

- Gartchonzie Pond

- Allt a Chip Dhuibh

- Loch Vennachar

- Cul na Greine

- Tigh Mor Fishing Pond

- Loch Ard

- Loch Earn

- Glenample Top Pond

- Lochan Eala

- Lochan na Bi

- Lochan Creag nan Caorann

- Lochan a Mhadaidh

Active Shellfish Sites

There is one active shellfish site within the National Park and it is located south of Callander.

Obstacles to Fish Migration

The interactive map provided by SEPA Web displays natural and artificial obstacles to fish migration, particularly affecting salmonid species, across Scotland. Within the Loch Lomond and The Trossachs National Park, various barriers such as dams, weirs, and culverts are identified, potentially hindering fish movement and impacting aquatic ecosystems. The map also indicates the severity of these obstacles and highlights any mitigation measures in place.

Policy 33 – Minerals

National context

United Kingdom Minerals Yearbook 2021

Between 2014 and 2020, Scotland's mineral production experienced significant fluctuations, particularly in coal extraction. Opencast coal production declined sharply from 2.5 million tonnes in 2014 to just 167,000 tonnes in 2020, while deep-mined coal saw no recorded production. There was no reported production of natural gas, crude oil, or condensates from onshore sources, while offshore figures remain undisclosed. In non-ferrous metals, gold production peaked at 6 kg in 2016, with no output recorded thereafter, while silver production reached 14 kg in the same year before ceasing.

Among industrial minerals, sand and gravel (land-won) production fluctuated, peaking at 6.2 million tonnes in 2016 before declining to 4.8 million tonnes in 2020. Igneous rock (16.9 million tonnes) and limestone and dolomite (1.3 million tonnes) were key extracted materials, along with sandstone (2.8 million tonnes). The production of talc remained low, falling from 5,000 tonnes in 2014 to just 1,000 tonnes in 2020, while silica sand production was recorded at 655,000 tonnes in 2018. Peat extraction was noted at 501,000 m³ in 2014, with no further figures available. The report highlights Scotland's ongoing shift away from coal mining and the continued importance of aggregates and industrial minerals in construction and industry.

Collation of the results of the 2019 Aggregate Minerals Survey for Scotland

The Collation Results 2019 Aggregate Minerals Survey Scotland report provides insights into the role of National Parks in the context of aggregate minerals in Scotland. It highlights that National Parks and National Scenic Areas together cover 21% of Scotland's land area, serving as important protected landscapes that balance conservation with limited development activities.

In terms of aggregate mineral sales, only 1.7% (0.36 million tonnes) of the total sales in Scotland came from National Parks and National Scenic Areas in 2019. Additionally, no new planning permissions were granted for the extraction of sand, gravel, or crushed rock within National Parks during this period. This reflects the restrictive approach to mineral extraction in these protected areas, ensuring that landscape preservation and environmental protection remain a priority.

Despite this restriction, reserves of aggregates in both active and inactive sites within National Parks and National Scenic Areas accounted for 4% (5.2 million tonnes) of total reserves across Scotland. This indicates that while some extraction activities do

occur within these areas, they are carefully managed and controlled to align with environmental regulations and conservation goals.

The report also highlights that National Parks and National Scenic Areas are not mutually exclusive from other designated conservation areas, such as Sites of Special Scientific Interest (SSSIs). This means that some sites within National Parks may also carry additional conservation protections, further limiting the scope of aggregate extraction activities.

National Park context

Minerals - Construction Aggregates

The National Park has 2 quarries and mines with planning permission:

Cononish Gold and Silver Mine at Glen Cononish, Tyndrum:

Opened in Nov 2020 and has its first full year of production in 2021. This mine is not currently operational, although the current care and maintenance period is understood to end during the summer months with production recommencing.

Cambusmore quarry producing sand and gravel, at Callander:

In Feb 2022 recent approval for the retention of existing quarry processing plant at expansion.

There are a number of historic quarries that previously quarried slate and stone (e.g. sandstone, puddingstone). There is a sand and gravel resource identified in Glen Loin and various applications have been refused due to adverse impacts – particularly on the community and in relation to traffic generation.

Local Development Plans are required to support a 10-year landbank for construction aggregates. The key evidence informing this requirement is the 2019 Aggregate Minerals Survey for Scotland, which provides data on the production, distribution, and reserves of crushed rock, sand, and gravel across Scotland as of that year. The survey indicates that, at the time, aggregate reserves were generally sufficient to meet local demand. However, the data is only available at the level of strategic plan areas and for Argyll and Bute, with no specific information provided for the National Park itself.

Summary of Stakeholder Engagement

This section will be completed following the end of the engagement period and prior to inclusion in the final Evidence Report.

Summary of Implication for the Proposed Plan

The implications of the evidence for the new Local Development Plan may be summarised as follows:

Community Wealth Building

- The new Local Development Plan (LDP) should consider including targeted policies that actively support the retention and reinvestment of wealth within local communities. These policies should align with the core pillars of the Community Wealth Building Bill - such as fair employment, local financial power, and democratic ownership of the local economy - to create a more resilient and self-sustaining rural economy within the National Park.
- The new LDP should identify and map important community assets – this could be anything from community facilities, community owned assets and buildings and locally important areas of greenspace or buildings - that need to be protected. These should be identified through the Local Place Plans and further engagement with local communities.

Business and Industry

- The LDP should support small-scale, low-carbon, and nature-based enterprises that align with net zero and climate resilience goals. This includes businesses in sustainable land use, biodiversity, local food, renewables, eco-tourism, and the circular economy. Policies should enable their growth in suitable locations, supporting local jobs, supply chains, and a just transition.
- Addressing skills shortages should be a key consideration for the new Local Development Plan, particularly in supporting the transition to a low-carbon, nature-based economy. Planning policy can play an enabling role by identifying and allocating land or premises suitable for green businesses and social enterprises that focus on skills development in sectors such as renewable energy, land management, conservation, and tourism.
- The evidence indicates that existing economic development sites within the National Park have largely remained undeveloped, with limited market demand. Where demand does exist, it is typically driven by local businesses and is modest in scale, often related to the growth or expansion of existing enterprises rather than large-scale new development.

In light of this, the new Local Development Plan should consider deallocating or reallocating sites that have proven ineffective or are unlikely to be developed.

City, Town, Local and Commercial Centres

- The new LDP should consider developing mapping to show the network of centres across the National Park, illustrating settlement roles, connections, and activity hubs. This will guide decisions on infrastructure, transport, and services, supporting a cohesive strategy that balances community needs with environmental and economic goals.
- The LDP should continue to prioritise town and village centres as community hubs for retail, services, and economic activity. It should protect their vitality by resisting harmful out-of-centre or excessive commercial-to-residential developments, and support flexible, mixed-use projects that help centres adapt and thrive.

Retail

- The need for additional town and village retail facilities to support 20-minute neighbourhoods will need to be carefully considered in the new Local Development Plan, particularly in areas where new residential allocations are proposed. Ensuring that everyday services and amenities are within a reasonable walking or cycling distance is key to achieving the principles of local living. This not only supports more sustainable travel patterns and reduces car dependency but also helps to strengthen local economies and foster resilient communities. The LDP should explore opportunities to facilitate small-scale, community-oriented retail development as part of mixed-use allocations and ensure that infrastructure and spatial planning support the integration of these facilities into existing settlements.
- The new LDP should consider mapping retail provision across the National Park to assess distribution, type, and accessibility, identifying gaps within settlements and key visitor areas. This will guide targeted policies and support new retail aligned with 20-minute neighbourhoods and sustainable local economies.

Rural Development

- The LDP must align with NPF4 guidance to identify rural character, development pressures, community priorities, and economic needs per area. It should clarify areas where development (including farms, crofts and economic activity) is supported or restricted based on environmental sensitivity and local context.
- The LDP could designate specific areas where economic development, particularly tourism-related, may be inappropriate due to high visitor pressure or environmental sensitivity.

- The LDP should tailor rural development policies to reflect local needs and opportunities, supporting community-led and social enterprise projects like small-scale retail and business units. It should also identify suitable areas for such development while applying stricter controls in environmentally sensitive locations.

Tourism

- The LDP should promote sustainable tourism development that supports local communities and protects The Park's natural and cultural assets. This includes identifying appropriate locations for new visitor accommodation, attractions, and infrastructure, while managing tourism pressure in sensitive areas. The LDP may need to set criteria for assessing tourism proposals, particularly in high-demand or ecologically fragile areas, and ensure they contribute positively to local economic development, placemaking, and community wellbeing.
- The LDP should explore whether more specific occupancy restrictions (e.g. preventing year-round occupancy for holiday lets) should be introduced to help manage the impact of tourism on permanent housing availability - particularly since NPF4 does not explicitly address this.
- Policies could restrict new self-catering accommodation in towns and villages where there is evidence that it is reducing residential housing stock. Exceptions may be made for conversions, such as garages or garden developments, that do not displace existing homes. To manage pressure from holiday lets, the National Park Authority could also consider establishing Short Term Let Control Areas in affected locations.
- The LDP should support and protect serviced accommodation (hotels, guest houses, B&Bs) in towns and villages, as they are well-located near transport and amenities, provide community benefits such as cafés or restaurants, and support local jobs and social vitality.
- The new Local Development Plan should establish clearer upper thresholds for business expansion, moving beyond reliance on the existing scale as the only benchmark. This approach would help prevent disproportionately large developments from altering the character of rural landscapes. It should also include safeguards to manage cumulative or incremental expansion over time, ensuring growth remains proportionate and in keeping with the local context.
- The LDP should identify suitable locations for self-catering and glamping lodges based on demand data - supporting development along popular routes like the West Highland Way and in under-served areas such as Cowal, while also managing potential oversaturation in the southern and eastern areas of The Park.

<u>Aquaculture</u>

- Consideration needs to be given as to whether the new LDP will align with the NPF4 policy for sustainable aquaculture. There is limited scope for aquaculture development within the National Park and therefore a bespoke policy should be considered.
- Support for aquaculture in the new LDP should align with the National Marine Plan, ensuring sustainability, minimal environmental impact, and compatibility with other land and marine uses. Proposals must also show community benefit and support climate and nature recovery goals.

<u>Minerals</u>

- Safeguard important mineral resources while ensuring extraction is sustainable and community sensitive. The LDP should identify key resources, set clear assessment criteria, and take a more restrictive approach - supporting extraction only where there's a clear national need, no alternative outside The Park, and alignment with conservation and community goals.
- In line with NPF4's policy, the new Local Development Plan should avoid mineral extraction or related development in sensitive ecological zones, such as Sites of Special Scientific Interest (SSSIs), ancient woodlands, peatlands, or other designated or high-value natural areas.

Statements of Agreement / Dispute

This section will be completed following the end of the engagement period and prior to inclusion in the final Evidence Report.

Appendix

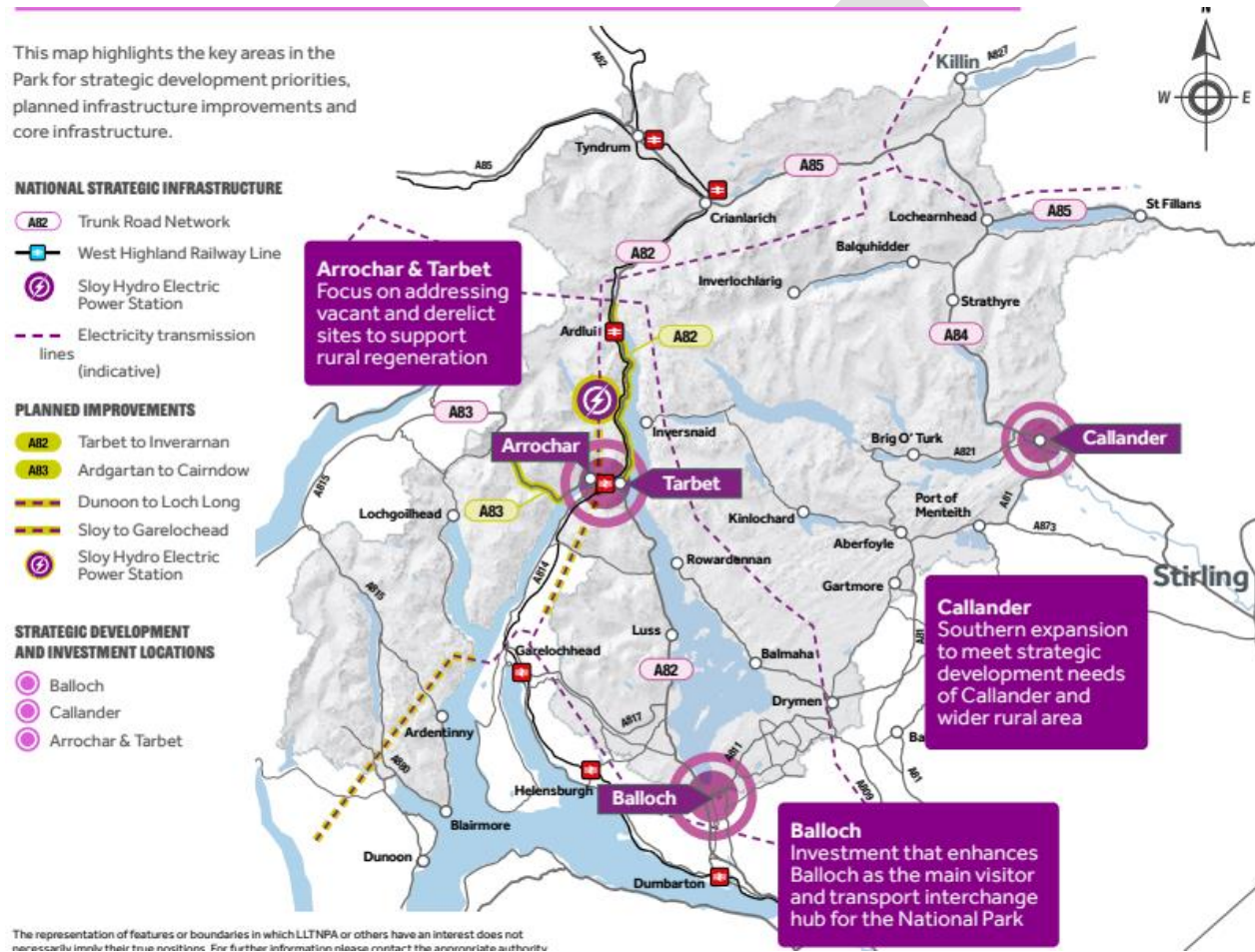*Figure 1 – National Park Partnership Plan Development Strategy*

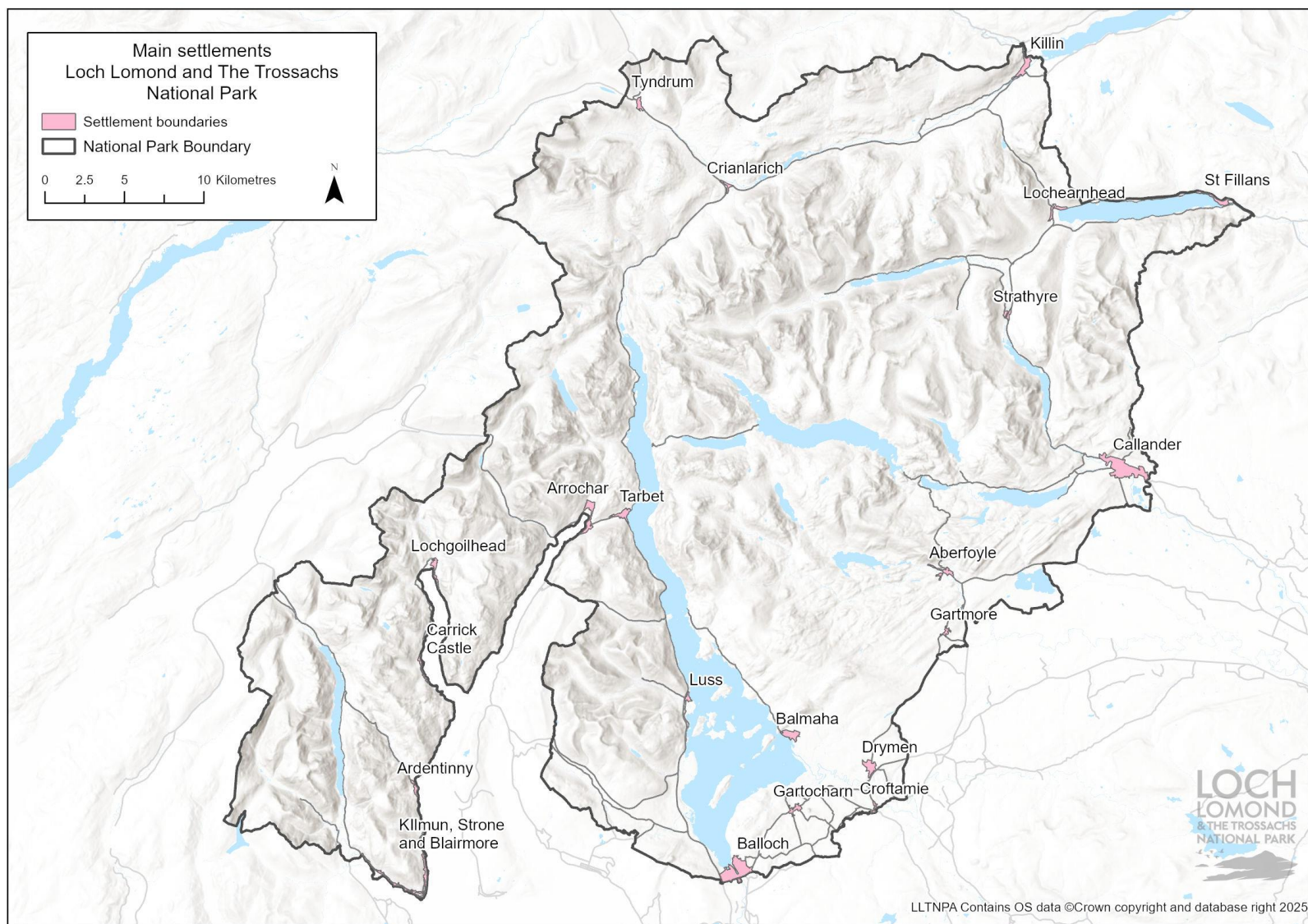*Figure 2 – Main Settlements in The National Park*
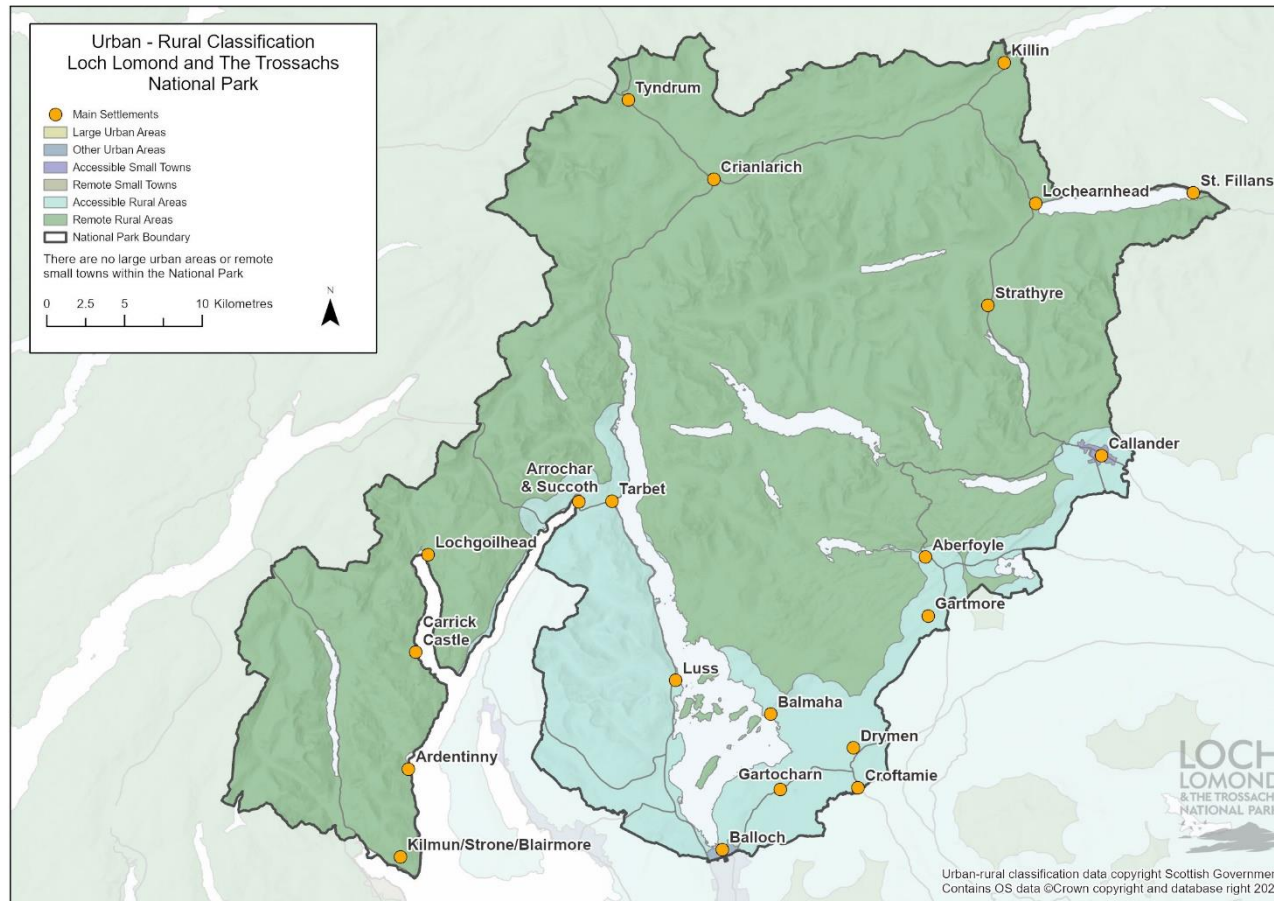
Figure 3 – Urban – Rural Classification

Urban - Rural Classification
Loch Lomond and The Trossachs
National Park

Main Settlements
Large Urban Areas
Other Urban Areas
Accessible Small Towns
Remote Small Towns
Accessible Rural Areas
Remote Rural Areas
National Park Boundary

There are no large urban areas or remote small towns within the National Park

0   2.5   5   10 Kilometres

Urban-rural classification data copyright Scottish Government
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Figure 4 – Tourism Approvals and Completions between 2017 - 2021

Tourism approvals and completions
2017-2021
Loch Lomond and The Trossachs
National Park
- Built or under construction
- Application approved
- Main Settlements
- National Park Boundary

0   2.5   5   10 Kilometres

Contains OS data ©Crown copyright and database right 2025
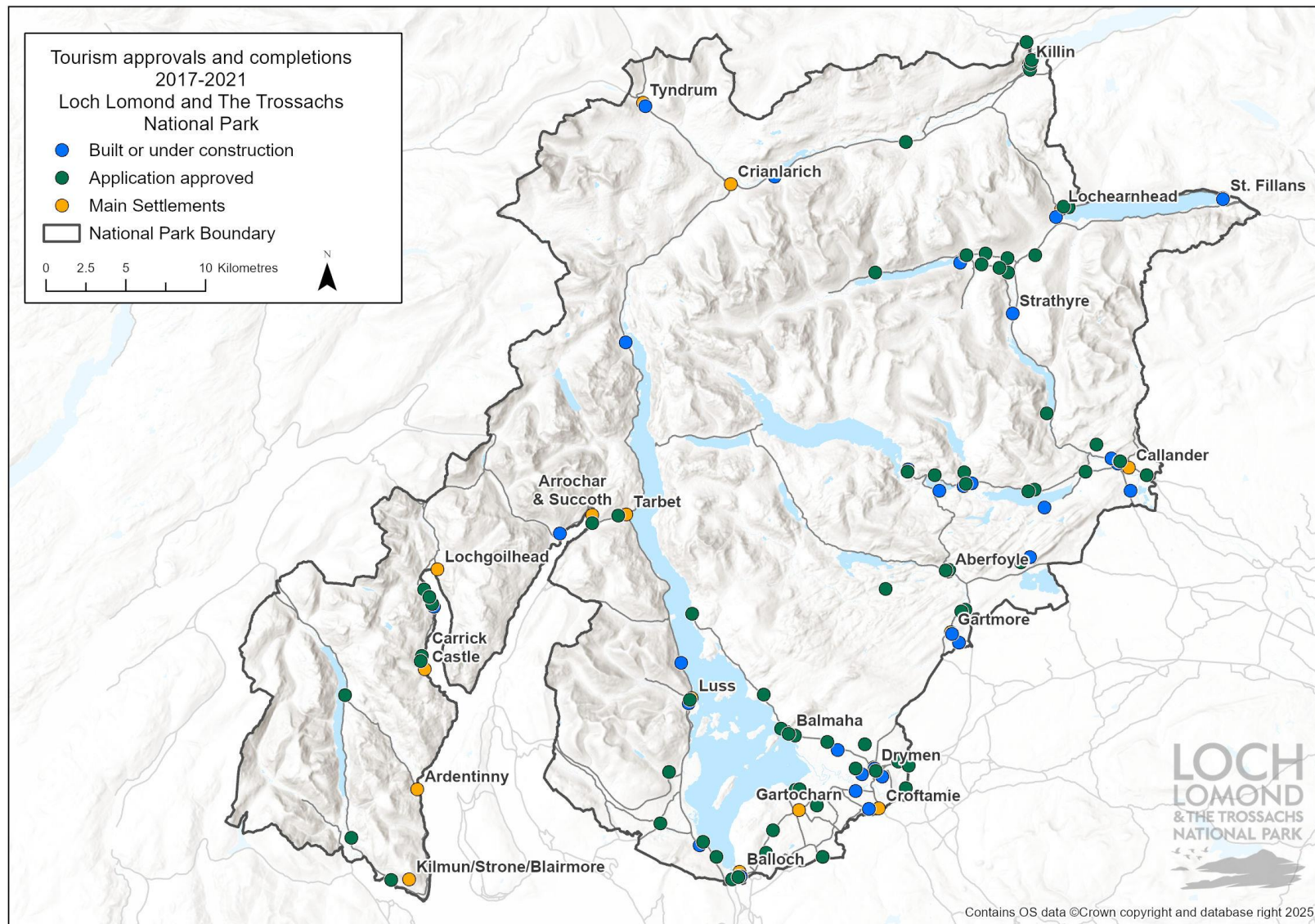
Figure 5 – Camping and Motorhome Sites across Loch Lomond and The Trossachs National Park