Local Development Plan

Annual Monitoring Report
2024

Contents

1.0 Introduction

1.1 Context

This Annual Monitoring Report arrives following the adoption of the new National Park Partnership Plan and as work progresses on the review of the Local Development Plan (LDP) 2017. The next LDP will be a 10-year plan and preparation has commenced. More details can be found in the 2025 Development Plan Scheme.

The current LDP was adopted on the 16th of December 2016. Following adoption, an annual monitoring framework was established to provide insight into the use and effectiveness of the LDP policies and to monitor progress in relation to the delivery of the LDP's vision and strategy over this period. These reports can be found on our website: Local Development Plan Monitoring and Audits.

1.2 Purpose of the Report

Given the resource intensive nature of monitoring, the annual monitoring reports from 2022 onwards have been simplified. The predominant development types in the National Park (apart from minor applications like household extensions) are for housing and tourism. This 2024 monitoring report builds upon the simplified reporting in 2022 and 2023 to include the number and type of approvals for housing and tourism accommodation development in 2024.

2.0 Tourism Accommodation

The Visitor Experience Planning Guidance (revised in 2022) defines tourism accommodation as: *"broadly, a building or place of short-term accommodation for tourists on a commercial basis".* This definition covers a range of different developments, but for the purposes of this report, tourism accommodation is referred to as follows:

- **Self-Catering (buildings):** A range of un-serviced accommodation containing facilities for food preparation. This includes houses, cottages, chalet/lodges and other permanent purpose-built buildings (including annexes) that are not caravans. This category does not include serviced accommodation such as bed and breakfasts, bunkhouses, guesthouses or hotels.
- **Self-Catering (caravans):** A caravan as defined in The Caravan Sites Act 1968. Their appearance can vary greatly, ranging from classic style static caravans to pod style glamping accommodation, shepherd huts and timber-clad chalets. The key difference is that this type of construction is more lightweight and capable of movement/transportation by road. Most are constructed off-site and are bolted to (or simply placed on) the ground.
- **Bedspaces:** A suitable sleeping area for one person. These are only counted for serviced accommodation such as hotels/guesthouses, hostels and bunkhouses and includes serviced apartments (which may also offer self-catering options).
- **Pitches:** Camping provision. This can refer to either pitches for motorhome use, basic glamping pods (different from caravans as they have no facilities) or for tents.

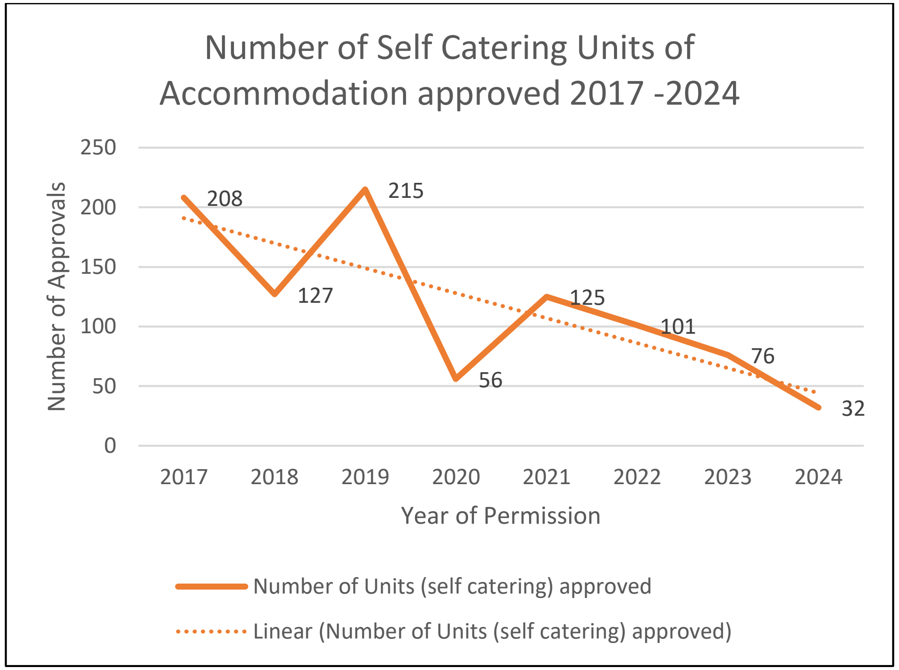
2.1 Brief Overview 2017 – 2024

The following graphs (figure 1 and 2) provide context, in terms of longer trends, for this year's (2024) monitoring findings.

The trend shows a steady decline in the number of planning approvals for tourism development over the plan period and up to the present year.

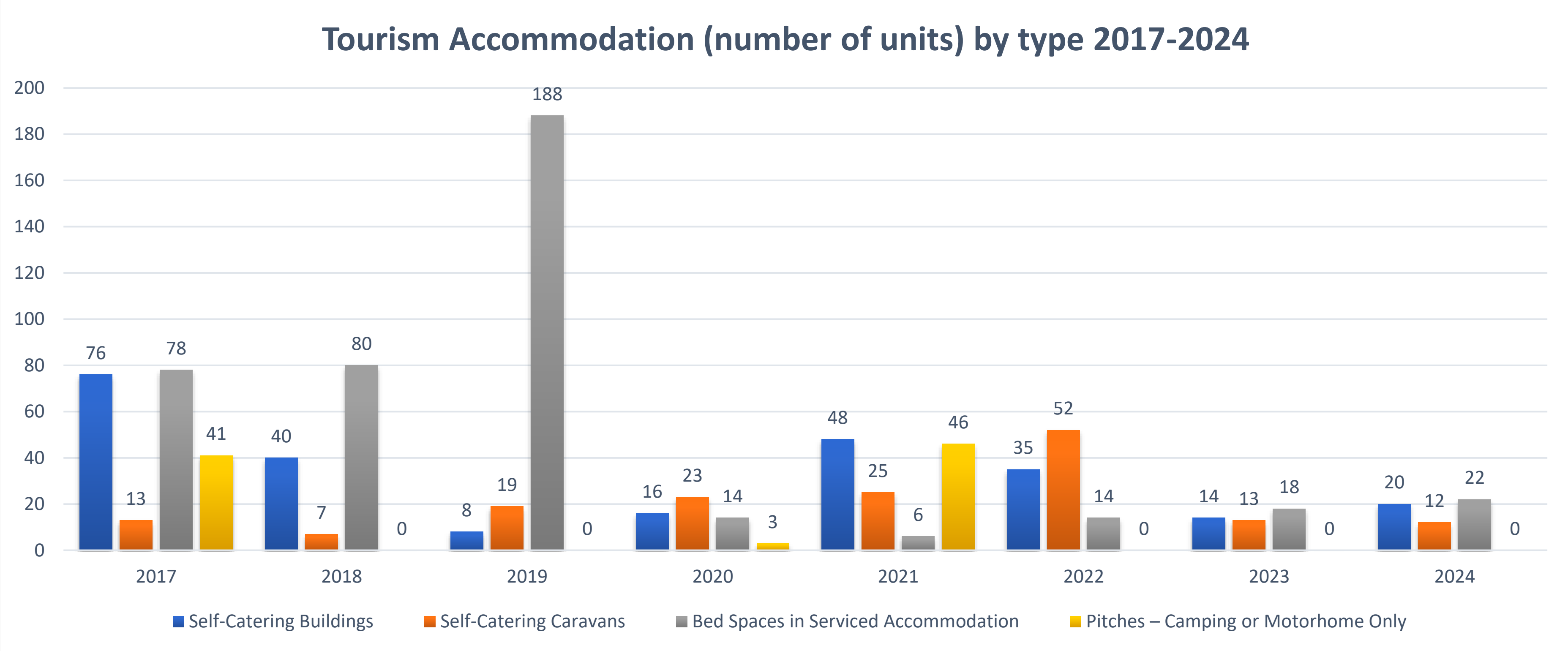
Figure 1: Graph showing the number of permissions for tourism accommodation 2017-2024

Figure 2: Graph showing the number of self-catering units approved 2017-2024



This reduction is mirrored in the number of units of self-catering accommodation approved which, at 32 units, is the lowest recorded since the start of the Local Development Plan period in 2017. (NB these figures do not include serviced apartments of which 22 were approved in 2024 – see below).

Figure 3: Graph showing the total number of units approved by tourism accommodation type between 2017 and 2024

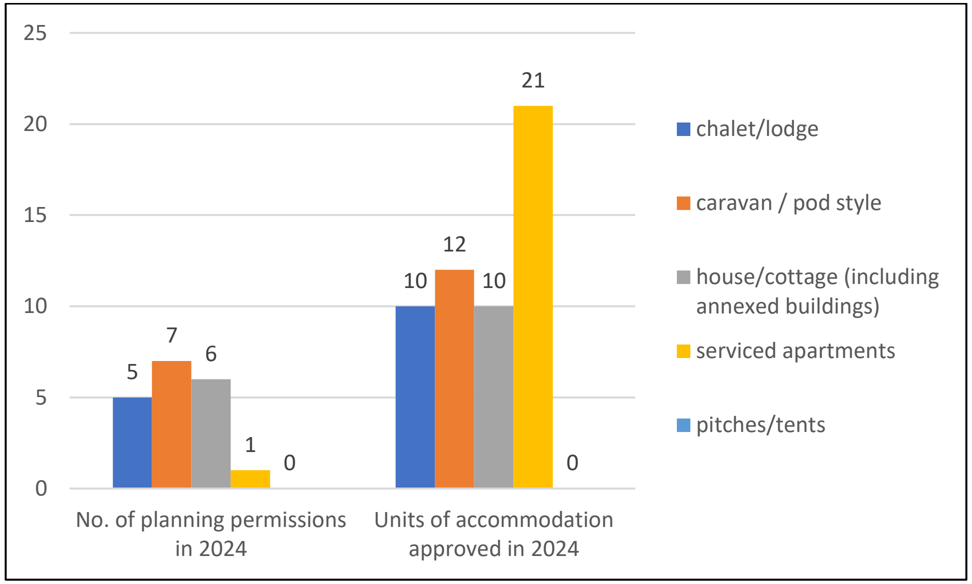


Overall, as seen in figure 3 the number of self-catering holiday units approved in 2024 mirrors the low number approved in 2023 (27) which, in turn, showed a decline in approvals for this type of accommodation from the previous two years (2021 and 2022) which coincided with the emergence from the Covid 19 pandemic.

2.2 Tourism Accommodation Findings 2024

Figure 4 shows the breakdown of approvals for tourism development in 2024 by development type. There were 19 planning permissions for tourism accommodation granted over this period.

Figure 4: Chart showing both planning permissions and total accommodation units approved by tourism accommodation type in 2024



The 22 units of serviced apartments arose from one planning application for the change of use and re-development of an existing hotel in Killin which, if implemented, would result in the creation of 21 serviced apartments (albeit a reduction in the former 39-bedroom capacity of the hotel). There is a complete absence in 2024 of permissions for other types of serviced units (such as hotels and guesthouses).

Self-catering units in new buildings comprised the majority of approvals (i.e. conversions of existing buildings or new purpose-built buildings) with 20 units arising from 11 planning approvals, predominantly for 1 to 3 units. Caravans and lightweight structures also continue to be popular, although the trend for this type of accommodation appears to be declining in recent years – perhaps because the market is demanding higher quality purpose-built accommodation.

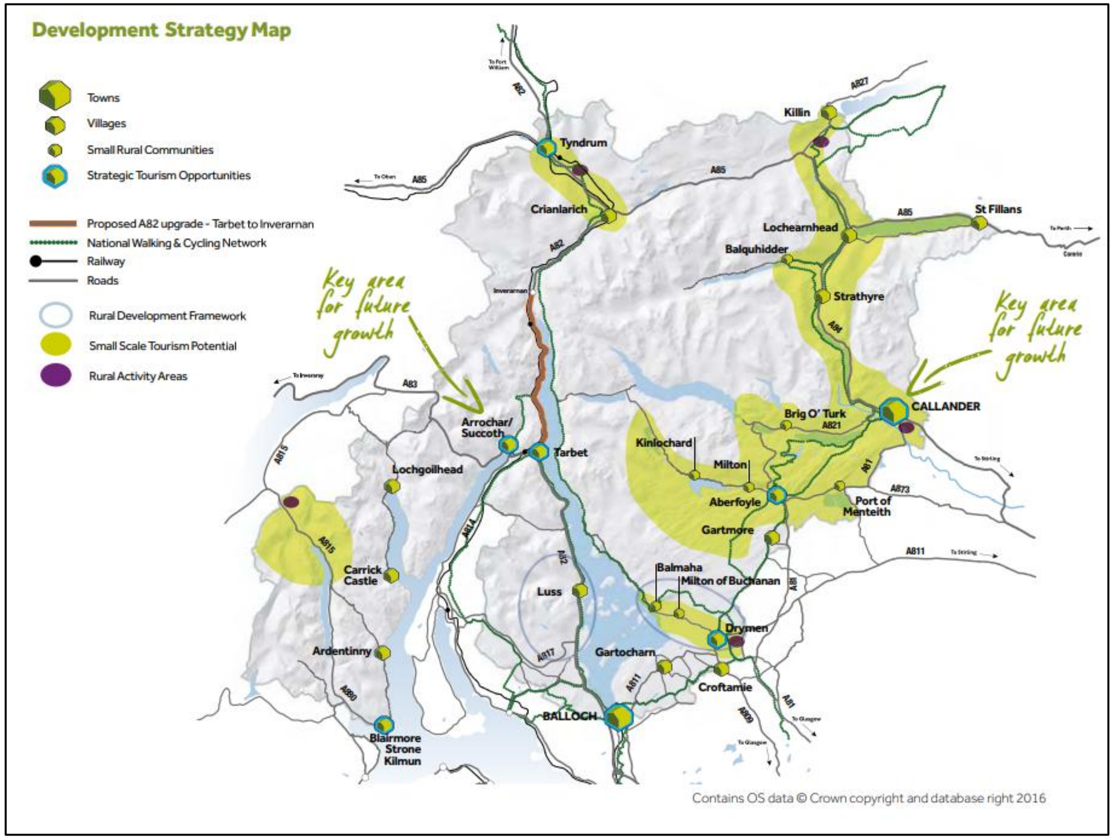
There were no approvals for motorhome or tent pitches in 2024.

2.4 Tourism Accommodation Approvals by Area

The Local Development Plan – and its supporting guidance – establishes a spatial strategy that sets out where new tourist accommodation may be supported. The spatial criteria for tourism accommodation are summarised below and in the Local Development Plan Development Strategy Map extract below (figure 5):

- **Within Towns and Villages** including Strategic Tourism Opportunities (Policy VEP1(a))
- **Within a safe walking distance** from a town or village (Policy VEP1(a))
- **Small Scale Tourism Potential Area** in areas of the countryside with access to existing recreational network of paths, infrastructure, or visitor facilities (within the green shaded area on the Strategy Map) (Policy VEP1(b))
- **Countryside** (Policy VEP1(e-g))

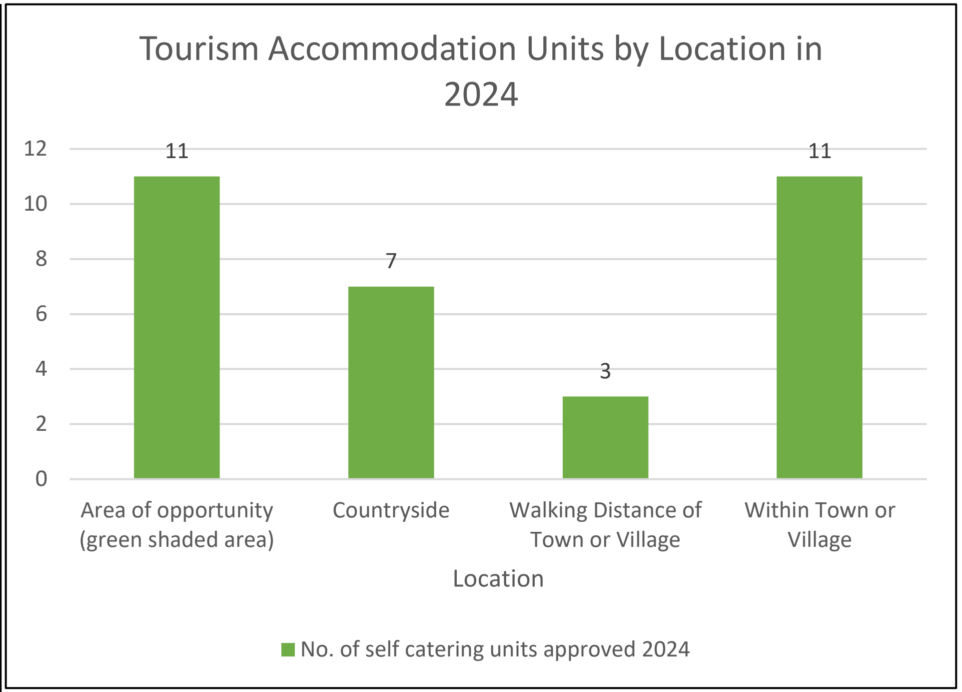
Figure 5: Local Development Plan 2017: Development Strategy Map



Figures 6 and 7 below show the number of planning permissions and units granted for tourism accommodation in 2024 based on their location.

Figure 6: Location of tourism accommodation planning permissions in 2024

Figure 7: Location of tourism accommodation units approved in 2024



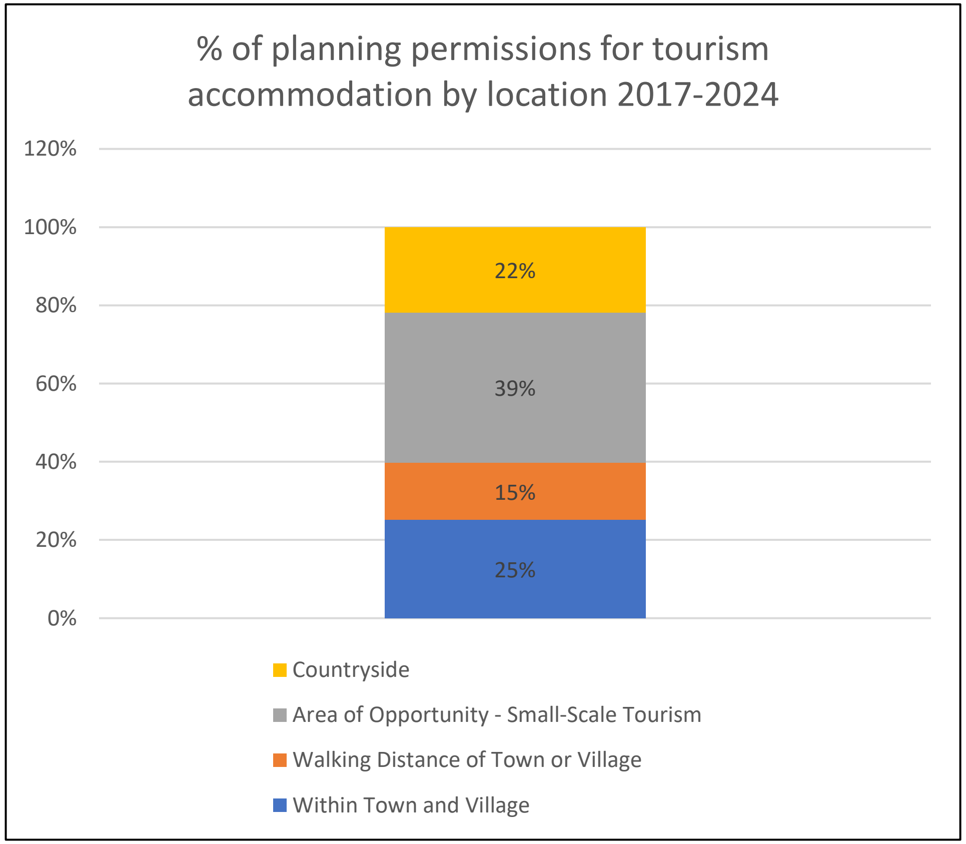
The majority of planning permissions were within the area of opportunity (the green shaded area) where small scale tourism proposals are supported. A significant percentage were also within towns and villages. All proposals, bar two, approved across the National Park were for 3 or fewer units of accommodation. It is important to note that approvals in the countryside are likely to mainly comprise expansion of existing tourism businesses which are explicitly supported under VEP1(d). The number of accommodation units by location are all self-catering (i.e. the graph omits serviced apartments which are counted as bedspaces). In 2024 there were 21 bedspaces approved within Killin – inside the village limits.

Figure 8 below, provides an insight into the location of planning permissions in 2024 compared to the preceding 7 years from 2017-2023.

Figure 8: Chart highlighting the comparison in percentage of planning permissions for tourism accommodation by location during 2017-2023 with 2024

This shows broad consistency with previous trends in the proportion of permissions granted in each of the locations. There has been a slight increase in the proportion of development proposals within towns and villages and a decrease in proposals adjacent to towns and villages in 2024 compared to previous years.

Figure 9: Chart highlighting the percentage of planning permissions for tourism accommodation by location between 2017 and 2024



Overall, the Area of Opportunity remains the most popular location for tourism accommodation development proposals with almost 40% of proposals being located within the green shaded area (figure 9).

3.0 Housing

National Planning Framework 4 (NPF4) has set out a Minimum All-Tenure Housing Land Requirement (MATHLR) for each Local Authority. The MATHLR figure for Loch Lomond and The Trossachs National Park is 300 units over the next 10 years. It is expected that each planning authority will exceed the MATHLR figure when determining their housing land requirement in their Local Development Plans.

As part of the preparation of the upcoming Local Development Plan, we will be establishing new housing targets for the next 10-year period which will be considered as part of the evidence report preparation.

This chapter provides an overview of housing development in the National Park for 2024 and for the years running up to 2024 for context to help inform the Local Development Plan evidence report.

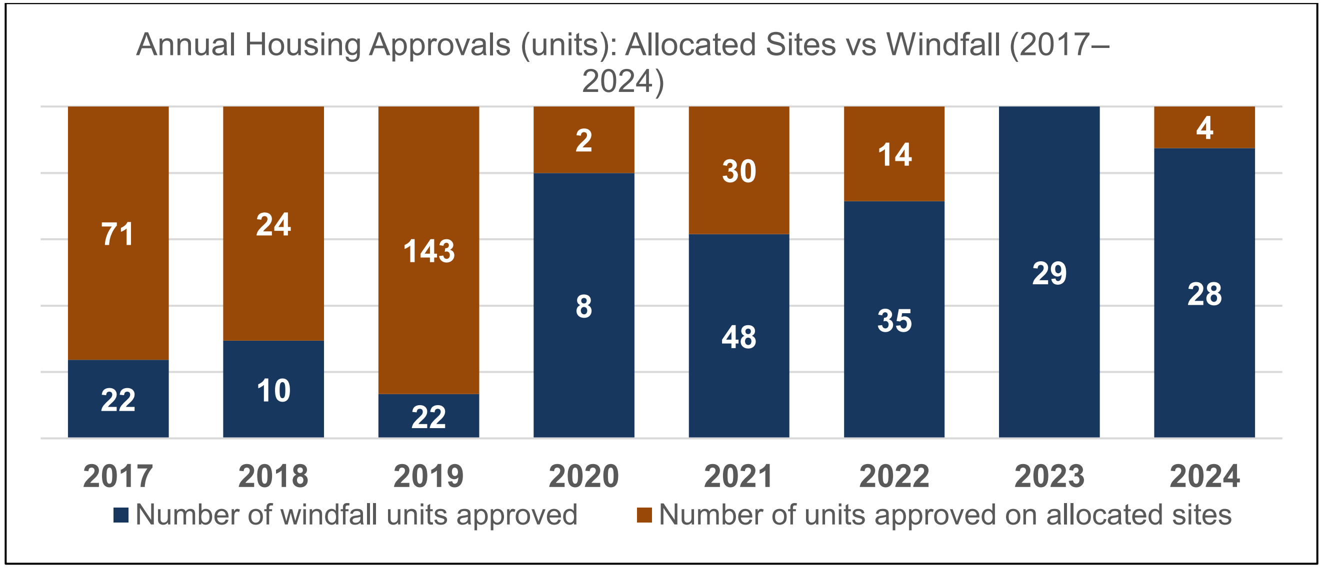
3.1 Housing Approval Findings 2024

This report will now provide a detailed breakdown of 2024's housing development before situating these findings in relation to the longer-term trends explored in the previous section. In 2024, the following key findings were extracted from planning records:

- **32** new homes were approved in total comprising **31** open market homes and **1** affordable home
- **28** units were windfall and **4** units on sites allocated in the current LDP
- **14** out of a total of 23 planning permissions for new housing in 2024 were in Towns and Villages

Figure 10 shows the type of housing approval as a percentage of the total approved units in 2024 compared with period between 2017-2023.

Figure 10: Chart showing the type of housing approvals (allocated or windfall) as a percentage of total approved units in 2024 compared with 2017–2023



In recent years, windfall approvals have increasingly accounted for a greater proportion of new housing delivery compared with units approved on allocated sites. This shift appears to reflect growing challenges associated with developing the remaining allocated sites, including higher infrastructure requirements, increased build costs, and other viability constraints that can slow progress. At the same time, there is a market demand for smaller-scale and self-build opportunities that are typically delivered as windfall, contributing to their rising share of approvals.

Table 1 shows the number of approved units as a percentage of the total approved units in 2024 compared with period between 2017-2023. The proportion of affordable versus open market housing also fluctuates annually. By collating data from the past seven years, we can establish a standard for comparison. As shown in Table 4, the trend from 2017 to 2023 shows that open market housing consistently made up most approved units. In 2024, all approved housing units were for open market provision.

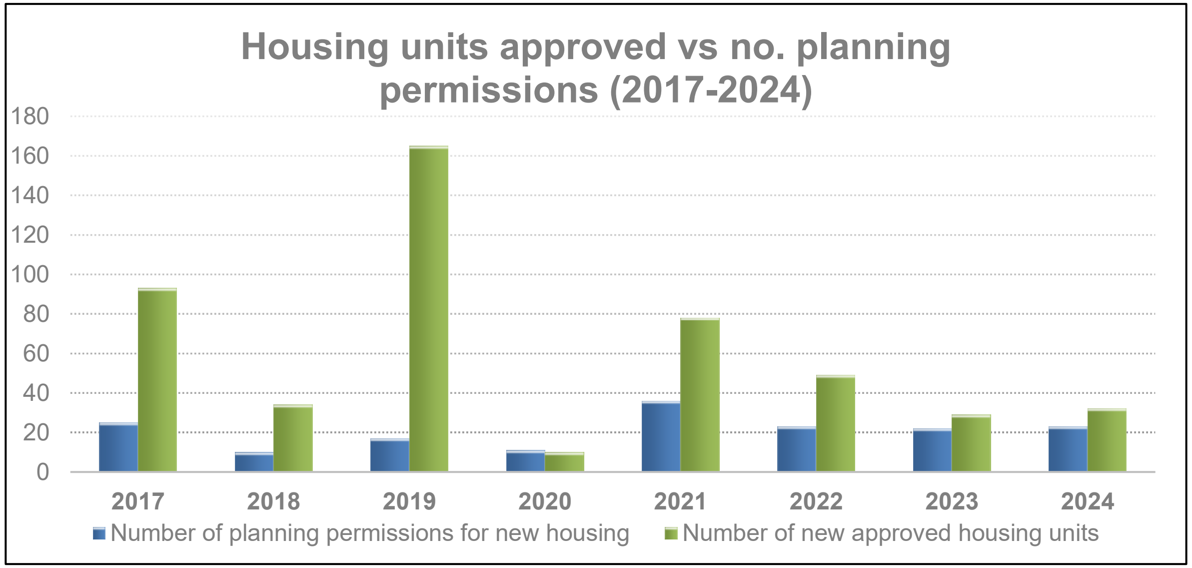
Table 1: *Number of Approved Units as % of Total Approved Units in 2024 compared with period from 2017 to 2023.*

Number of Approved Units as % of Total Approved Units in Stated Period		
Type of Housing	**2017 – 2023**	**2024**
Affordable	34%	3%
Open Market	66%	97%

Note on data recording: *Open market housing includes units exempt from affordable housing requirements, such as those with occupancy restrictions, conversions of buildings with historic character, or developments that provided a commuted sum in lieu of on-site affordable housing.*

Figure 11 below illustrates trends in housing approvals between 2017 and 2024, showing both the number of planning applications approved and the total number of housing units approved as part of those applications.

Figure 11: Chart highlighting the number of housing units approved and planning permissions received each year between 2017 and 2024



In 2024, 23 housing applications were approved – similar to the 22 approvals in 2023 and close to the median annual figure of 22 approvals recorded between 2017 and 2023.

The number of housing units approved shows more variation year to year. High figures, such as in 2019, reflect the approval of a small number of large-scale developments on allocated sites, including Drymen LT1, Callander H1 & MU2, and Balloch MU2. Since 2021, the number of approved units has gradually declined, with 23 units approved in 2024. This trend may be influenced by the viability of several allocated sites, alongside the presence of existing valid permissions, as identified in the Housing Land Audit.

The combined view shows that planning activity has remained consistent, even as the number of housing units delivered per application has varied. When considered alongside the earlier bar chart comparing windfall and allocated site approvals, it highlights a recent shift toward smaller-scale proposals. While many of these come forward as windfall sites, they are still assessed within a plan-led system.

Since 2023, the statutory development plan for the National Park comprises the adopted National Planning Framework 4 (NPF4), and we are currently preparing a new Local Development Plan and reviewing the status of existing housing allocations. This evolving context is important to housing delivery trends, as proposals are now assessed against both the adopted NPF4 and the existing Local Development Plan, introducing additional policy considerations beyond the original LDP allocations.

3.2 Location of 2024 Housing Approvals

The adopted Local Development Plan 2017 sets a clear spatial strategy: to direct most new development to towns and villages where services, transport links, and community infrastructure are strongest. This is where almost all allocated housing sites are located. By focusing development in these areas, the Plan aims to support more sustainable patterns of living, protect the countryside, and enable access to local facilities and employment opportunities.

The following looks at where housing units were approved – whether in towns and villages, edge of settlement, small rural communities, countryside, or building groups.

As seen in Table 2 and 3, the vast majority of housing units approved between 2017 and 2024 were located in towns and villages (77%). This reflects the Plan's settlement-focused approach and the delivery of housing on allocated sites. A smaller proportion of housing was approved in more dispersed locations such as building groups, small rural communities, and the open countryside. *Note: figures include all approved units between 2017 and 2024, including renewals of expired permissions*.

Table 2: Location of housing units approved between the period of 2017 to 2024 and for 2024 alone.

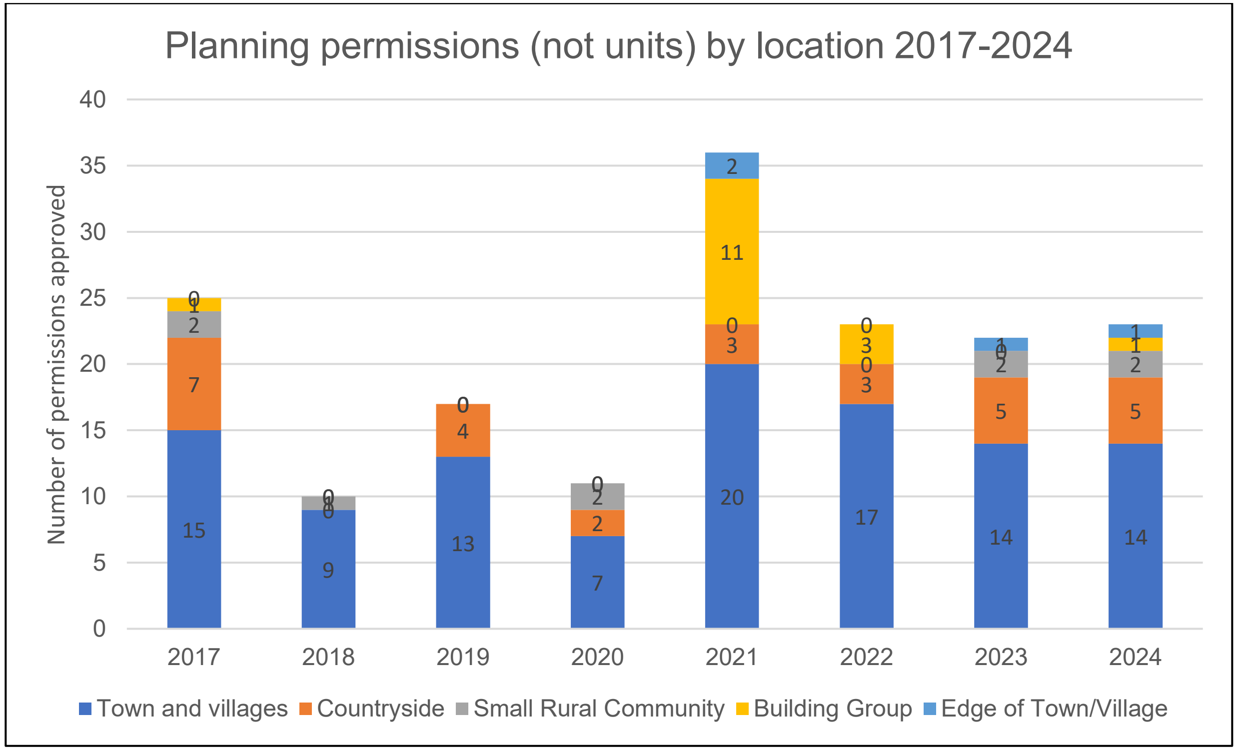
Location	Units approved 2017-2024	% of total	Total units approved 2024	% of total
Town and villages	378	77%	17	53%
Countryside	30	6%	5	16%
Small Rural Community	31	6%	2	6%
Building Group	38	8%	7	22%
Edge of Town/Village	13	3%	1	3%

Table 3: Location of housing planning permissions received between 2017 and 2024, inlcuding percentage calculations of the total planning permissions received.

Location	Permissions (not units) 2017-2024	% of total
Town and villages	109	65%
Countryside	29	17%
Small Rural Community	9	5%
Building Group	16	10%
Edge of Town/Village	4	2%

To illustrate patterns over time, figure 12 below shows the number of planning permissions annually by location.

Figure 12: Chart showing breakdown of planning permissions by location each year between 2017 to 2024



The overall distribution of housing approvals in 2024 remains similar to previous years and broadly aligned with the Local Development Plan's spatial strategy. Most units continued to be approved in or near towns and villages; areas generally identified as more sustainable due to better access to infrastructure, services, and active travel options.

Between 2017 and 2024, approximately 86% of approved housing units were located within towns, villages, small rural communities, or on sites immediately adjacent to settlements. In 2024, around 53% of housing units were approved in towns, villages, small rural communities, or on adjacent sites. This is lower than in previous years perhaps reflective of the fact that most allocated sites within and adjacent to settlements have received approval and/or are completed.

Permissions in the Countryside areas accounted for 20% of all housing applications between 2017 and 2024, reflecting development approved under the housing policy exemptions such as housing tied to rural businesses like agriculture or for staff accommodation needs for well-established tourism businesses or conversions of traditional buildings.

Most Countryside-area planning permissions were for single dwellings. Only one open market approval was granted permission, carried forward from a previously allocated site in the previous 2012 Local Development Plan.

Overall, recent housing approvals continue to reflect the intent of the Local Development Plan's spatial strategy, with development focused on towns and villages, and countryside permissions remaining limited, small-scale, and policy compliant.

3.3 Housing Completions 2024 Findings

In 2024 the following figures were extracted from planning records:

- **18** housing units were completed comprising:
  - **4** Open market units and
  - **14** Affordable units (Croftamie H1 allocated housing site)
- **89%** of the completed approved units were in a settlement

Table 4 below shows the type of site of the completed housing units as a percentage of the total completed units in 2024 compared with period between 2017-2023.

Table 4: Housing approvals by location (% of total units, 2024 vs 2017–2023)

Completions by location		
Type of Housing Completion	**2017 – 2023**	**2024**
Windfall	44%	17%
LDP Allocated Sites	56%	83%

The majority of housing units completed in 2024 were delivered on the allocated Croftamie H1 site. This reflects a continued trend observed since 2017, indicating that allocated sites remain the primary source of housing delivery within the National Park.

Although the number of housing completions in allocated sites remains high, the chart below highlights the important contribution of windfall approvals as well as completions to overall housing supply. However, in terms of actual completions, allocated sites have delivered a greater share, particularly when it comes to affordable and social rented housing, which is explored in more detail later in this report.

Table 5 below shows the number of completed housing units as a percentage of the total completed units in 2024 compared with period between 2017-2023.

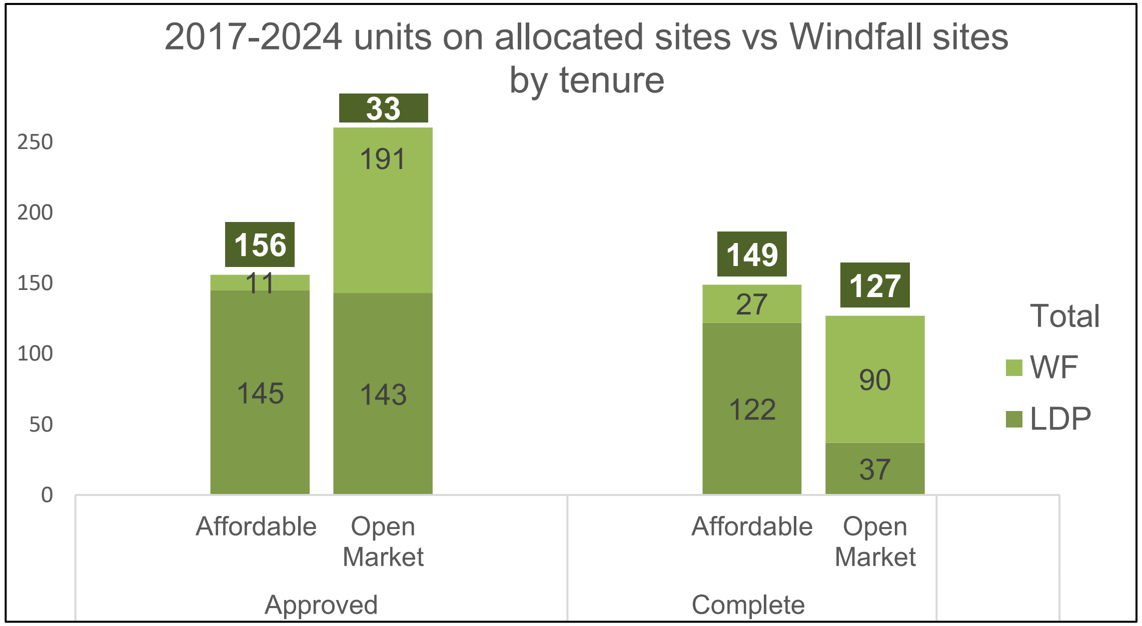
Table 5: Completed housing units by tenure (% of total units, 2024 vs 2017–2023)

Completions by Tenure		
Type of Housing	**2017 – 2023**	**2024**
Affordable	52%	78%
Open Market	48%	22%

In 2024, the majority of completed housing units in the National Park were affordable (78%). This continues the longer-term trend observed between 2017 and 2023, during which affordable housing accounted for 52% of all completions. Most of these affordable homes were delivered through allocated housing sites.

To place 2024's completions in context, figure 13 below compares the number of housing units approved and completed between 2017 and 2024, broken down by tenure and site type (allocated vs windfall).

Figure 13: Approved vs completed housing units by tenure and site type (2017–2024)



This helps illustrate how affordable housing delivery has remained consistent over time, particularly through Local Development Plan sites, while open market delivery has been more variable.

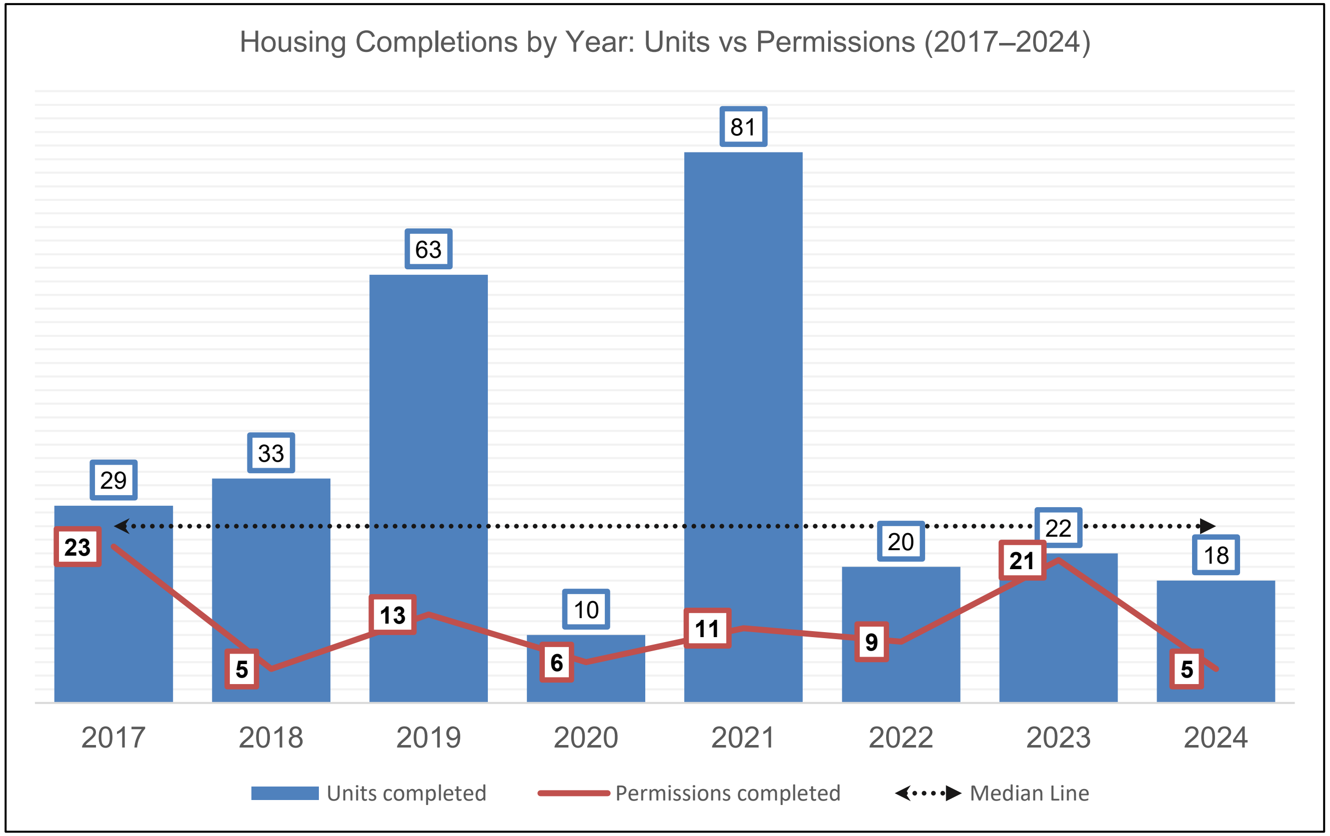
Between 2017 and 2024, most housing approvals and completions in the National Park were delivered on Local Development Plan allocated sites. Affordable housing in particular has predominantly come through allocated sites, reflecting strong progress in supporting local housing needs.

Windfall sites continue to play a notable role, especially in the delivery of open-market homes, where they make up a significant share of completed units. The chart shows that while approvals for both affordable and open-market homes remain high, completions are lower overall, indicating a lag between consent and delivery on the ground.

Overall, the figures demonstrate continued reliance on allocated sites for affordable housing delivery, balanced by ongoing contributions from windfall sites that help maintain flexibility in the housing land supply.

The delivery of affordable housing reflects the Strategic Housing Investment Programme (SHIP) which provides public funding and is relatively less reactive to market conditions than open market housing. The 2024 completion of 14 affordable housing units on the allocated development site at Croftamie (H1) demonstrates affordable housing delivery can still be achieved despite recent market challenges brought about by the Covid pandemic.

Figure 14: Graph comparing the number of housing units completed and permission completions each year between 2017 and 2024



Notably in figure 14, while 2024 saw a drop in the number of permissions completed (only five), the number of homes delivered remained broadly in line with recent years. This reflects a wider trend: fewer permissions do not always mean fewer homes, as some approvals relate to larger developments. Conversely, a year with many completions may deliver fewer total homes if they're mostly single dwellings. This highlights that in a rural context, even a small number of permissions can have a significant impact on housing delivery, depending on the scale of development.

Of the 490 housing units approved between 2017 and 2024, just 28% (135 units) are confirmed as completed. This figure excludes completions from permissions granted prior to 2017. The total number of completions over the period is 276.

A further 18% (90 units) remain extant (with a current planning permission), although a significant proportion of these relate to the stalled Drymen H1 site. Another 13% (66 units) are considered expired, based on lapsed timeframes and no indication of a construction start. A further 11% (54 units) have been superseded by more recent permissions for the same site.

It is also worth noting that of the units approved between 2017 and 2024 which remain extant, around 29% (68 units) are currently marked as being under construction (based on Notices of Initiation of Development or monitoring checks). This indicates that a significant proportion of permissions are showing signs of progressing.