Bowdun Offshore Wind Farm, Offshore EIA Report

Appendix 18.1: Socio-Economics, Tourism and Recreation Baseline

TWP-BOW-JCB-ENV-RPT-00016 | April 2026

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Glossary

Defined term	Definition
Gross Disposable Household Income (GDHI)	Measures the total amount of money households have available to spend or save after paying direct taxes and receiving benefits or welfare payments.
Gross Value Added (GVA)	Measures the contribution of individual companies, industries, and regions to the national economy. This figure is presented at current prices, reflecting the total value generated by the economy/sector after subtracting intermediate consumption (i.e., the cost of inputs used in production).
Gross Value Added (GVA) per head	Calculated by dividing the GVA for an area by the number of individuals in that area's resident population. Compares the economic output of regions of different sizes/population sizes.
Gross Value Added per Hours Worked (GVA/h)	Measures output in an industry or economy per number of hours worked by employees. This is the official and headline measure of labour productivity in the UK.
Primary Industries	Primary industries involve the extraction, harvesting, and production of raw materials directly from the earth, including agriculture, mining, fishing, and forestry.
Social Capital	The social connections that contribute to people's quality of life, health, safety, economy and wellbeing in the neighbourhoods where they live (Scottish Government, 2020).

Acronyms

Acronym	Definition
aGVA	GVA at Basic Prices
B&Bs	Bed and Breakfasts
DESNZ	Department for Energy Security and Net Zero
GP	General Practice Medicine
GDHI	Gross Disposable Household Income
GVA	Gross Value Added
GVA/h	Gross Value Added per Hours Worked
HFSV	Home Fire Safety Visits
LTE	Long Term Empty
NHS	National Health Service
O&G	Oil and Gas
O&M	Operation and Maintenance
ONS	Office for National Statistics
RQF4+	Regulated Qualifications Framework Level 4 and above
SIMD	Scottish Index of Multiple Deprivation
UK	United Kingdom
WELLBY	Wellbeing-Adjusted-Life-Years

Table of Units

Units	Definition
km	Kilometre
£	GBP
%	Percent

1 Introduction

1.1.1 This Socio-Economics, Tourism and Recreation Technical Report presents the Socio-Economics, Tourism and Recreation baseline data collected for the offshore elements of the Bowdun Offshore Wind Farm Project (hereafter referred to as the Proposed Development). The Proposed Development covers the Option Lease Area that is located in the E3 Plan Option Area (POA), detailed in the Sectoral Marine Plan (SMP) for Offshore Wind Energy (Scottish Government, 2020), and the Offshore Export Cable Corridor. The Array Area is located 38 km offshore at its closest point, covering an area of 187 km^2 and will comprise the Wind Turbines (fixed foundation), Inter-Array Cables (IACs), Offshore Substation Platforms (OSPs), Interconnector Cables and any necessary scour/cable protection. The Export Cable Corridor will include a maximum of three High Voltage Alternating Current (HVAC) Offshore Export Cables, each with a length of up to 70 km and will make landfall at Benholm, Aberdeenshire.

2 Baseline Environment

2.1 Description of Geographies

2.1.1 This section describes the baseline environment in the Study Areas for the Socio-Economic, Tourism and Recreation sub-topics set out in Table 18.1 of Volume 2, Chapter 18: Socio-Economics, Tourism and Recreation and shown on Figure 18.1 and Figure 18.2.

2.1.2 The terminology used throughout this chapter to refer to various geographical areas is as follows:

- Regional Socio-Economics Study Area refers to Aberdeenshire, Aberdeen City, and Angus;
- Tourism and Recreation Study Area refers to Aberdeenshire and Aberdeen City; and
- Local Socio-Economics Study Area refers to area around Landfall (Mearns Electoral Ward Area).

2.1.3 Aberdeen City is an urban local authority located in the north east of Scotland and is bounded on all sides by the Aberdeenshire Council area. Aberdeen City is the third most populous city in the country after Glasgow and Edinburgh. Aberdeenshire is a predominantly rural area in North East Scotland that includes the Cairngorm mountains, agricultural lowlands, and coastal landscapes. Angus is also a predominantly rural local authority bordering Aberdeenshire, Dundee City and Perth and Kinross.

2.1.4 The Proposed Development comprises up to 67 Wind Turbines, located approximately 38 km offshore at its closest point to the Aberdeenshire coastline. Electricity generated by the wind farm would be transmitted to shore via Offshore Export Cables, making Landfall at Benholm just south of Gourdon, before connecting to the onshore grid. Gourdon is located in the electoral ward of Mearns.

2.2 Baseline Environment

2.2.1 The subheadings in this baseline environment section correspond with the subtopics within the assessment, as shown in Table 2.1. The data within the baseline has been collected through desk-based research and will be used to inform the assessment of impacts of the Proposed Development. A full list of data sources is provided in Table 18.4 of Volume 2, Chapter 18: Socio-Economics, Tourism and Recreation.

Table 2.1: Methodology

Subtopics of Assessment	Subheadings Within the Baseline
Gross Value Added (GVA), Employment and Supply Chain	GVA and Employment
Changes to Demographics	Population Baseline, GVA and Employment
Changes in Demand for Housing and Other Services	Housing and Vacant Property, Local Services (including Education, Healthcare Services, and Emergency Services)
Changes to Tourism and Recreation Receptors	Tourism (includes tourism accommodation)
Socio-cultural Impacts	Socio-cultural Community Values

GVA and Employment

2.2.2 Data on GVA and employment for the UK, Scotland and the local authority areas that comprise the Regional Socio-Economics Study Area are summarised in Table 2.2.

Table 2.2: GVA (Current Prices) and Employment (Office for National Statistics, 2025; Scottish Government, 2025)

	Aberdeenshire	Aberdeen City	Angus	Regional Study Area	Scotland	UK
GVA	£7.3 billion	£11.1 billion	£2.5 billion	£20.9 billion	£183.5 billion	£2,601.6 billion
Employment	135,500	123,500	51,800	310,800	2.7 million	34.2 million

2.2.3 Across Scotland, between 2022 and 2023, aGVA (GVA at basic prices) for the non-financial business economy decreased by £3.9 billion (-3.1%), driven by a decline in Primary Industries (which includes the oil and gas sector). Therefore, in 2023, the Primary Industries sector accounted for an estimated £27.7 billion of total non-financial business economy aGVA (22.9%) (Scottish Government, 2025). Furthermore, GVA output varied between cities and rural areas. With 34% of Scotland's GVA (£183.5 billion – see Table 2.2) produced in larger cities in 2023 (accumulated by 50,960 private sector businesses), whereas only 22% was produced in 'mainly rural' areas, despite a larger number (59,815) of private sector businesses situated in these areas (Scottish Government, 2025).

2.2.4 In 2023, Aberdeen City and Aberdeenshire's total GVA was estimated at £11.1 billion and £7.3 billion respectively, which combined is approximately 10% of Scotland's output. GVA in Angus was recorded as £2.5 billion in 2023.

2.2.5 Table 2.3 compares the labour market of the authorities to national averages. Key indicators include employment rates, GVA per hours worked (GVA/h), Gross Domestic Product (GDP) per head, and the proportion of individuals with Regulated Qualifications Framework Level 4 and above (RQF4+) qualifications, which are qualifications equivalent to a first year of a bachelor's degree.

Table 2.3: Labour Market Indicators (Office for National Statistics, 2025; Office for National Statistics, 2025; Office for National Statistics, 2025; Office for National Statistics, 2025)

	Aberdeenshire	Aberdeen City	Angus	Scotland
Employment Rate, 2025	74.4%	76.4 %	69.9%	74.4%
Economic Inactivity, 2025	22.7%	21.6%	26.7%	22.7%
Unemployment Rate, 2024	2.5%	3.9%	3.2%	3.7%
Gross Weekly Pay, by Place of Residence, 2025	£824.80	£781.70	£748.10	£775.6
Claimant Count, 2024	1.8%	3.2%	2.8%	3.1%
GVA/h, 2023	£37.3	£39.3	£39.9	£41.3
RQF4 and Above Qualifications, 2024	58.8%	62.4%	51.6%	53.7%
No Qualification, 2024	N/A	4.8%	8.6%	8.2%
GDP per head, 2023	£31,115	£52,583	£25,918	£37,192

2.2.6 Generally, gross weekly pay and qualification levels in Aberdeen City and Aberdeenshire are higher than Scottish averages. Furthermore, council reports show average household incomes in Aberdeenshire (£45,853) were greater than in Scotland (£39,386) in 2024 (Aberdeenshire Council, 2025). Whereas economic activity, qualification levels and gross weekly pay in Angus were lower than that of Scotland, Aberdeenshire and Aberdeen.

Aberdeen City and Aberdeenshire

2.2.7 Between 1998 and 2014, Aberdeenshire's GDP per head nearly doubled, rising from £15,862 to £31,339 - an increase of over 98%, outperforming the national average growth of 76%. However, this upward trend reversed after 2014, with GVA per head falling to £27,392 by 2020. Throughout this period, Aberdeen City consistently maintained a higher GVA per head and the most recent data (2023 - Table 2.3) highlights that Aberdeen City had the largest GDP per head of the four local authorities at £52,583.

2.2.8 Table 2.4 displays the industries which contributes the most to GVA and employment in Aberdeenshire and Aberdeen City in comparison to Scottish averages.

2.2.9 In terms of both GVA and employment, the professional, scientific, and technical activities sector is prominent in both Aberdeenshire and Aberdeen City, employing 10.2% and 13.3% of their respective workforces (compared to 7.2% nationally).

Table 2.4: Highest Contributing Industries to GVA and Employment – Aberdeenshire and Aberdeen City (Office for National Statistics, 2023; Office for National Statistics, 2025)

	Aberdeenshire	Scotland Average
GVA, 2023	Real Estate Activities (£1,098m); Manufacturing (£1,023m); Professional, Scientific, and Technical Activities (£979m)	Real Estate Activities (£22,259m); Manufacturing (£18,224m); Professional, Scientific, and Technical Activities (£12,170m)
Employment, 2025	Wholesale and Retail Trade (14.3%); Manufacturing (13.3%); Professional, Scientific, and Technical Activities (10.2%)	Wholesale and Retail Trade (12.7%); Manufacturing (7.1%); Professional, Scientific, and Technical Activities (7.2%)
	Aberdeen City	**Scotland Average**
GVA, 2023	Professional, Scientific, and Technical Activities (£1,551m); Human Health and Social Work (£1,382m); Agriculture, Forestry and Fishing; Mining and Quarrying (£1,046m)	Professional, Scientific, and Technical Activities (£12,170m); Human Health and Social Work (£20,658m); Agriculture, Forestry and Fishing; Mining and Quarrying (£4,391m)
Employment, 2025	Human Health and Social Work (16.5%); Professional, Scientific, and Technical Activities (13.3%); Mining and Quarrying (12.7%)	Human Health and Social Work (16.7%); Professional, Scientific, and Technical Activities (7.2%); Mining and Quarrying (1.0%)

Angus

2.2.10 Trends within Angus have demonstrated a similar positive trajectory, with GDP per head increasing from £35,062 in 2008 to £51,320 in 2019 - a 46.3% increase. This greatly outperformed trends in Scotland, which recorded a 7.3% increase over the same period (Office for National Statistics, 2025). Total turnover of companies in Angus also increased, rising by 30.8% between 2008 and 2019, from £2.4 billion to £3.1 billion. This is significantly higher than the national average, with Scottish companies recording only a 4.2% increase in that same period. Angus' key sectors which have supported turnover growth in recent decades include food and drink, tourism and, engineering and manufacturing (Invest In Angus, 2022).

2.2.11 Table 2.5 contains the industries which contributes the most to GVA and employment in the local authority in comparison to the Scottish average. Manufacturing is the lead contributor in terms of GVA by a considerable margin. Moreover, the three largest sectors of employment in Angus are wholesale and retail trade, human health and social work, and manufacturing. The proportion of employment within these sectors is greater than the national averages.

Table 2.5: Highest Contributing Industries to GVA and Employment – Angus (Office for National Statistics, 2023; Office for National Statistics, 2025)

	Angus	Scotland Average
GVA, 2023	Manufacturing (£859m); Real Estate Activities (£379m); Human Health and Social Work (£249m)	Manufacturing (£18,224m); Real Estate Activities (£22,259m); Human Health and Social Work (£20,658m)
Employment, 2025	Wholesale and Retail Trade (15.2%); Human Health and Social Work (18.2%); Manufacturing (13.6%)	Wholesale and Retail Trade (12.7%); Human Health and Social Work (16.7%); Manufacturing (7.1%)

Marine Economy

2.2.12 In 2023, the Scottish marine economy generated £5.6 billion in aGVA, 3% of the total Scottish economy, and employed 75,900 people, accounting for 2.9% of total Scottish employment. Marine and coastal tourism employs the most people (46%) of all the marine economic sectors whilst support for oil and gas provides the largest contribution to aGVA (43%) (Scottish Government, 2025).

2.2.13 Generally, the marine economy is most important in the north-east of Scotland. In 2023, marine aGVA was the largest contributor to aGVA in Aberdeen City, accounting for 21% of the local authority's GVA. In third was Aberdeenshire, where marine aGVA contributed to 12% of its total aGVA. Furthermore, national marine economic output is concentrated within those local authorities. The contribution of the north-east Local Authorities to Scotland's marine aGVA is displayed in Table 2.6. Aberdeen City contributes 38% to Scotland's marine aGVA, considerably higher than other Local Authorities in Scotland.

Table 2.6: Local Authority Contribution to Scotland's Marine aGVA (Scottish Government, 2025)

	Aberdeen City	Aberdeenshire	Angus
Contribution to Scotland's Marine aGVA	38%	18%	1%

2.2.14 Among the marine economy sectors, fishing is very important for Scotland's coastal economies. In 2023, fishing generated £394 million aGVA, 0.21% of the Scottish economy and 7% of the marine economy aGVA. Moreover, fishing employed 3,793 people, accounting for 0.14% of total Scottish employment and 5% of marine economy employment. Notably, Aberdeenshire had the largest fishing aGVA of all local authorities in 2023. Recorded at £199 million, Aberdeenshire is associated with producing 50% of total fishing aGVA in Scotland. This output can be attributed to the Port of Peterhead, which is currently the largest fishing port in the UK (Scottish Government, 2025).

Energy Transition

2.2.15 Economic trends in the north east, particularly Aberdeen City and Aberdeenshire, are linked to the North Sea oil and gas sector, which in 2026, supports approximately 61% of all energy sector jobs in the 'central lowlands' region[1] (Energy Skills Intelligence Hub, 2026). However, the industry is rapidly declining, and the region is pursuing economic diversification, increasing investment into reskilling of oil and gas workers and the development of renewable energy sources (Community Planning Aberdeen, 2023). Forecasts estimate that 90% of oil and gas industry workers possess medium to high skills transferability, equipped to transition into new, renewable energy sector jobs (Offshore Energies UK (OEUK), 2023; Community Planning Aberdeen, 2023).

2.2.16 Offshore wind is a key priority for government investment. In 2023, it generated 19% of all renewable energy generation in Scotland, with an estimated turnover of £2.6 billion. Between 2014 and 2023, Scottish OWF turnover increased by 2024% and employment in the sector rose by 389% (Scottish Government, 2025). The Department for Energy Security and Net Zero (DESNZ) estimates that offshore wind could support up to 100,000 direct and indirect jobs across Great Britain by the end of the decade (UK Government, 2025).

2.2.17 Offshore wind energy is a growing industry in the north-east of Scotland. Currently in 2026, there are 21,438 energy sector jobs in the ‘central lowlands’ region, 5,030 of which are in offshore wind (Energy Skills Intelligence Hub, 2026). Aberdeen City and Aberdeenshire are integrating into the sector. The Port of Aberdeen supports over 12,500 jobs in the local and regional supply chain and generates £1.5 billion GVA. However, 65% of revenue is currently generated by oil and gas operations, compared to only 1% by renewables, meaning it is a key site for energy sector transition (UK Parliament, 2025). The Port of Peterhead, situated in Aberdeenshire, is also a key location for offshore energy development; it is the north-east’s leading deep seaport catering for vessels such as offshore supply vessels, subsea support vessels, and cruise liners (Aberdeenshire Council, n.d.).

2.2.18 Angus is also becoming increasingly tied to offshore wind development, with plans for significant expansion of the Port of Montrose, a major global Operations and Maintenance (O&M) hub for offshore wind energy (Montrose Port Authority, 2025). Furthermore, in 2024, a new skills academy for renewable energy was announced to be built in Montrose, receiving £1.25 million of funding from Scottish Government’s Tay Cities Industrial Investment Programme (Angus Council, 2024).

[1]This is one of the three main geographical sub-divisions of Scotland which includes Aberdeenshire, Aberdeen City and Angus, as more disaggregated regional data for energy sectors is not available.

Population Baseline

2.2.19 Table 2.7 presents population statistics for the local authorities within the Regional Socio-Economics Study Area in comparison to Scotland.

Table 2.7: Population Demographics (Scottish Government, 2022; Office for National Statistics, 2025; National Records of Scotland, 2025)

	Aberdeenshire	Aberdeen City	Angus	Scotland
Total Population, 2024	265,080	231,780	114,810	5.5m
% under 16	18.5	15.7	16	19.9
% aged 16-64	60.5	67.2	58.9	60.6
% aged 65+	21.0	17.1	25.1	19.5
Population Density /km^2	41.9	1227	52.41	16.0
Net Migration Rate, 2023-2024 (per 1000 population)	4.2	11.7	5.5	10.2
Net Annual Population Increase, 2023-2024	0.2%	1.1%	0.1%	0.7%

2.2.20 Demographically, Aberdeen City has a high population density and a predominantly working-age population. Aberdeen City experienced a significant fall in net migration between 2022-2023 and 2023-2024, from 24.2 people per 1,000 to 11.7 per 1,000 people. Nonetheless, it still maintains the highest net migration rate among the local authorities, and is the only north-east local authority to experience population growth above national average that year.

2.2.21 Aberdeenshire is the sixth most populus council area in Scotland. There is a lower-than-average population of children and a higher-than-average population aged 65 and over, with a recorded population of 265,080 in 2024. In 2023-2024, Aberdeenshire was the council area with the second lowest net migration rate, out of all 32 council areas in Scotland. Alongside an ageing population, this has stalled the area's population growth.

2.2.22 In 2024, Angus had a recorded population of 114,810, with a lower-than-average population density and a higher-than-average proportion of those aged 65+. Population growth is very low, partly driven by falling net migration.

Housing and Vacant Property

2.2.23 Table 2.8 presents key housing statistics for the Local Authorities in comparison to Scottish averages.

Table 2.8: Housing Statistics (Office for National Statistics, 2026; Scottish Government, 2024)

	Aberdeenshire	Aberdeen City	Angus	Scotland
Average House Prices 2026	£198,000	£133,000	£174,000	£188,000
Average Rental Prices 2026	£861	£861	£831	£1,022
Vacancy Rate 2024	4.4%	6.3%	4.3%	3.3%

Aberdeen City and Aberdeenshire

2.2.24 The private rented sector is integral in Aberdeen City, housing approximately 20% of households, higher than the average for Scotland (approximately 13%) (Aberdeen City Council, 2025). In contrast, only 56% of dwellings were reported as owner occupied (versus the Scottish average of 61%) (Aberdeen City Council, Aberdeenshire Council, 2023). Despite this, the supply of private rented properties in the city has dropped by almost 20% since 2019, due to issues of volatile costs and a strengthening in tenants' rights, spurring landlords to leave the market (Aberdeen City Council, 2025). Equally, housing completions are on the rise, with 1,015 completions in 2024-2025 (Aberdeen City Council, 2025; Aberdeenshire Council, 2025). Local authority total and vacant housing stock data (2024) illustrates that Aberdeen City had the second highest amount of stock vacant (6.3%) across Scotland, with 4.6% of these are classed as Long Term Empty (LTE) homes (Scottish Government, 2025).

2.2.25 The private rented sector is of less importance in Aberdeenshire, particularly in rural areas. Only 11% of dwellings belonged to the private rented sector in 2023 whilst 71% of dwellings were owner-occupied (Aberdeen City Council, 2023; Aberdeenshire Council, 2023). However, housing completions have been generally declining for the past decade (Aberdeen City Council, 2025; Aberdeenshire Council, 2025). Between 2023-2024 and 2024-2025 alone, construction sector challenges led to a 12% fall in building completions across the authority, much larger than the 4% decline across Scotland (Aberdeenshire Council, 2025).

Angus

2.2.26 In Angus, most of the housing is owner occupied (63%) (Angus Council, 2021) and rented housing in the local authority is more affordable than other local authorities and across Scotland. Due to an ageing population, Angus is facing increasing demand for specialist housing to support age-related needs. To adapt to increasing demand, the council are completing many new social housing developments, including 70 new social rent homes in Montrose (Angus Council, n.d.).

Local Services

2.2.27 Performance standards are set and agreed between the Scottish Government and National Health Service (NHS) Boards to provide assurance on NHS Scotland performance. These standards provide an indication of the level of capacity at which each health board is operating at. Key performance metrics for the NHS Boards in the Regional Socio-Economics Study Area are shown in Table 2.9. Geographies are slightly different, and the data is more aggregated, based on the areas covered by NHS Boards (i.e. Grampian includes Aberdeenshire and Aberdeen City, while Tayside includes Angus).

Table 2.9: Key performance metrics for NHS Boards in the Regional Socio-Economics Study Area (Scottish Parliament, 2025)

	Grampian	Tayside	Scotland
A&E Estimate[1] (to 31/12/2025)	61.0%	82.3%	67.0%
GP 48 Hour Access Estimate[2] (to 31/03/2024)	85.7%	91.7%	89.1%
Diagnostic Waiting Times Estimate[3] (to 30/09/2025)	41.7%	59.1%	54.4%

[1]95% of people should be seen, admitted, discharged or transferred within 4 hours. NHS Boards should work towards 98.0%.

[2]GPs should provide 48-hour access to an appropriate member of the GP team for at least 90% of patients.

[3]All patients should receive key diagnostic tests/investigations within 6 weeks.

2.2.28 These performance indicators show that Tayside is meeting national standards for GP 48-hour access, while Grampian falls below the Scottish average. None of the NHS Boards are meeting the targets for accident and emergency, but Tayside performs better than Grampian in this area.

Aberdeen City and Aberdeenshire

2.2.29 Aberdeen City is experiencing capacity challenges for some local services. Although the pupil-to-teacher ratio has remained stable at around 14.1 between 2018 and 2024, suggesting that teacher supply is not being outpaced by pupil demand, this ratio is still higher than the Scottish average of 13.3 and the third highest of Scottish local authorities (Scottish Government, 2024). This suggests that student numbers are currently high. Indeed, 2024 school roll forecasts project that most secondary schools will be operating above capacity from 2025 (Aberdeen City Council, n.d.). Ambulance and GP services are also stretched; reports demonstrate that NHS Grampian, which operates across Aberdeenshire and Aberdeen City, has the longest turnaround times of all the 14 health boards in Scotland (Rutherford, Sabljak, 2025).

2.2.30 Despite rising demand, police services in the area are performing well, with 84% of surveyed residents satisfied with the officers who attended their calls and 76% of those surveyed saying they felt safe (Police Scotland, 2025). Similarly, local performance reports indicate improving fire and rescue services, with continual decreases in accidental fires between 2018 and 2023 (Scottish Fire and Rescue, 2025).

2.2.31 In Aberdeenshire, educational provision is high, yet secondary schools face capacity pressures, as larger primary school cohorts from previous years progress through education (Aberdeenshire Council, 2025). This is reflected in a growing pupil-to-teacher ratio, which increased from 13.5 to 13.8 between 2018 and2024, rising further above the national average (Scottish Government, 2024). Furthermore, fire and rescue services have demonstrated varying performance, with a downward trend in non-domestic fires and increasing Home Fire Safety Visits (HFSV's) being offset by rises in accidental and deliberate fires (Scottish Fire and Rescue, 2025). In Aberdeenshire, police demand is low compared to other areas in Scotland and satisfaction rates are very high (Police Scotland, 2023).

Angus

2.2.32 Provision of health services in Angus is strong, with NHS Tayside meeting key resourcing targets and showcasing operational improvements (NHS Tayside, 2025). Furthermore, educational capacity is high, with all primary and secondary schools all predicted to be below capacity until 2032 (Angus Council, 2022). Furthermore, the pupil-to-teacher ratio has remained constant around 13.0 between 2018 and 2024, below Scottish averages (Scottish Government, 2024). Conversely, in Angus, crime rates and police service demand are relatively high. A key policing issue is crimes of serious assault, and in the first quarter of 2025, there were 15 serious assaults. However, throughout the Local Authority, local police are working on reducing crime though educational engagement and wider initiatives (Angus Council, 2025). Fire and rescue service demand is also high, with rises in accidental fires and related casualties notwithstanding high levels of community engagement (Scottish Fire and Rescue, 2025).

Tourism and Recreation

Tourism sector and employment

2.2.33 The tourism industry in Aberdeenshire and Aberdeen City is a significant contributor to the regional economy, and in 2024, Aberdeen ranked seventh in spending by overnight visitors in UK cities, with an average spend per overnight visit of £290 in 2024, totalling £396 million (Visit Scotland, n.d.). As of 2020, one in ten Scottish tourism jobs were based in the Aberdeen City region (Strategic Development Planning Authority, 2020).

2.2.34 Figures from independent research conducted by Global Tourism Solutions using the Scottish Tourism Economic Activity Monitor model show an upward trajectory for the region's tourism sector. Key findings were as follows (Opportunity North East, 2025):

- The economic impact of tourism in Aberdeen and Aberdeenshire increased year-on-year to £1.27 billion in 2024, a growth of 2% over 2023;
- The region attracted almost 3.7 million staying visitors in 2024, up 16.9% on 2023;
- The region welcomed over 2.59-million-day visitors, up 2.8% from 2023; and

- Tourism directly employed 11,400 full-time equivalent jobs in 2024 across Aberdeen City and Aberdeenshire, an increase of 1.5% on 2023.

2.2.35 Further data on the tourism economy from Visit Scotland (2024) indicates that there were 695 tourism businesses in Aberdeenshire, accounting for 5.4% of all businesses. Similarly, in Aberdeen City, there were 550 tourism businesses, making up 6.3% of all businesses.

2.2.36 Visitor data for Aberdeenshire reveals a strong preference for rural and nature-based experiences, with 25% of tourists choosing to stay in countryside or rural locations. Scenic landscapes were the primary motivator for travel, cited by 70% of respondents, followed by interest in history and culture (53%) and outdoor activities (36%). Generally, visitors to the region are domestic (71%) and tend to be of an older age demographic (Visit Scotland, 2023).

2.2.37 Marine tourism, which refers to activities centred and hosted in and around the sea, is also a key motivator for travel and a large contributor to local tourism economy. In 2023, marine and coastal tourism generated £699 million aGVA, 0.38% of the Scottish economy and 12% of the marine economy aGVA. Marine tourism employed 34,600 people, 1.3% of Scottish employment (Scottish Government, 2025). Notably, the economic impact of marine and coastal wildlife tourism in Scotland is significant and growing, with these visitors spending £163 million per year, generating economic impacts of nearly £40 million, and support 1,268 full time jobs (The James Hutton Institute, n.d.). In 2023, in the north-east region, marine and coastal tourism generated £44.4 million aGVA, and employed 1,800 people (Scottish Government, 2025).

Tourism accommodation

2.2.38 Available data on the tourism accommodation stock available in Aberdeenshire has been drawn from the Aberdeenshire Accommodation Audit 2023. The audit states that *'the exact size of the accommodation sector is not currently known, mainly due to the fact there is no compulsory registration scheme for all types of accommodation establishments in the UK'* (Visit Aberdeenshire, 2023). In Aberdeen City and Aberdeenshire, tourism accommodation establishments are majorly non-serviced, predominantly self-catered accommodation.

2.2.39 Table 2.10 and Table 2.11 display the number of bed spaces per accommodation type.

Table 2.10: Tourism Accommodation – Aberdeenshire (Visit Aberdeenshire, 2023)

	Establishments	Rooms/Pitches	Bed Spaces
Serviced	16%	27%	23%
Non-Serviced	76%	41%	35%
Holiday/Touring Park	8%	33%	41%
Total	1,152	8,146	18,855

2.2.40 Aberdeenshire has a total of 18,855 bed spaces and Aberdeen City has a total of 14,234 bed spaces and across serviced and non-serviced accommodation stock.

Table 2.11: Tourism Accommodation - Aberdeen City (Visit Aberdeenshire, 2024)

	Establishments	Rooms/Pitches	Bed Spaces
Serviced	17%	81%	83%
Non-Serviced	83%	19%	17%
Total	575	7,078	14,234

2.2.41 Visit Scotland survey data can be used to observe patterns of demand across accommodation types. Although different geographic areas are used, Aberdeen & Grampian is considered broadly representative of the Tourism and Recreation Study Area. The data, shown in Table 2.12, reveals a decline in non-serviced accommodation occupancy between 2023 and 2024 alongside a small rise in hotel room occupancy. Data has also been included for the representative areas for Angus, as this is utilised in the assessment of changes to demand for housing.

Table 2.12: Tourism Accommodation Capacity – Angus, Aberdeen and Grampian (Visit Scotland, 2024)

	Angus & City of Dundee				Aberdeen & Grampian			
	2024	**2023**	**24/23 Diff**	**Change**	**2024**	**2023**	**24/23 Diff**[2]	**Change**[3]
Hotels % Room Occupancy	65.74%	65.90%	-0.16	100	69.90%	69.01%	+0.89	101
Guest House, B&B% Room Occupancy	14.83%	13.24%	+1.24	101	61.35%	66.76%	-5.41	95
Self-Catering Accommodation % Unit Occupancy	54.12%	56.87%	-2.75	97	24.90%	36.53%	-11.63	88

Recreation

2.2.42 Recreational sailing, boating and motor cruising is an important characteristic of coastal areas in Scotland. In a 2015 survey of 279 marine recreation and tourism businesses, general recreation, sailing and other forms of boating were reported as the second largest category that the businesses serve (Marine Directorate, 2015). Moreover, sailing alone is worth over £100 million to Scotland's economy each year. In Aberdeen City and Aberdeenshire, coastal assets, such as Aberdeen Beach and Balmedie Beach, are crucial for supporting

[2] 24/23 Diff is expressed by % Point Change.
[3] Change is Expressed by % Index Value; e.g. if the value has a Change increase of 15%, the index is 115; if it has fallen 5%, the index is 95. No change is expressed by 100 Index value.

local sailing and small vessel marine recreation (The James Hutton Institute, n.d.). Generally, recreational boating is highly seasonal, with the sailing season typically between May and August, reaching its highest level of activity in July. Additional information related to recreational sailing, boating and motor cruising is presented in Volume 2, Chapter 16: Infrastructure and Other Users and information regarding small vessel activity is available in Volume 2, Chapter 14: Shipping and Navigation.

Tourism and Recreation Receptors

2.2.43 Tourism in Aberdeenshire and Aberdeen City is primarily centred around natural and cultural tourism assets, such as coastline, castles, beaches and seascapes (Visit Scotland, 2023) and recent trends show a significant tourism boom in 2025 due to a record-breaking cruise, welcoming 43,000 passengers – a 79% increase compared to 2024 figures season (Aberdeen Business News, 2026). Key tourism assets on the southern Aberdeenshire coastline include Stonehaven Harbour, Dunnottar Castle, the Maggie Law Maritime Museum (Gourdon), and the Stonehaven Heated Open Air Swimming Pool (Visit Aberdeenshire, n.d.).

2.2.44 Tourism and recreation receptors have been identified from Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts and Volume 2, Chapter 21: Cultural Heritage, and are shown in Volume 2, Chapter 18: Socio-Economics, Tourism and Recreation, Figure 18.2.

2.2.45 The majority of receptors identified are located within 100 m of viewpoints identified in Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts. Tourism receptors with the potential to experience environmental effects from the Proposed Development are shown in Table 2.13 and

2.2.46 Table 2.14. Distances from the viewpoints are included in the tables.

Table 2.13: Tourism and Recreation Receptors

Receptor	Description	Location	Distance from SLVIA Viewpoint	Cultural Heritage Receptor
Buchan Ness Lighthouse	Lighthouse	Peterhead AB42 3NF	0 m from Viewpoint 1	✓
Slain's Castle	Castle	A975, Cruden Bay, Peterhead AB42 0NE	0 m from Viewpoint 2, along the Coastal Path Boddam to Cruden Bay	✓
Cruden Bay	Bay	Peterhead	0 m from Viewpoint 3	x
Collieston	Village	11 Whiteness Cottages, Hightown, Collieston, Ellon AB41 8RS	0 m from Viewpoint 5	x
Seal Beach	Beach	Newburgh, Ellon AB41 6BY	0 m to Viewpoint 6, intersecting the Coastal Path Newburgh Aberdeen City Boundary	x

Receptor	Description	Location	Distance from SLVIA Viewpoint	Cultural Heritage Receptor
Balmedie Beach	Beach	Aberdeen, AB23 8WU	0 m to Viewpoint 7, along the Coastal Path Newburgh Aberdeen City Boundary	x
Royal Aberdeen Golf Course	Golf Course	Links Rd, Bridge of Don, Aberdeen AB23 8AT	0 m to Viewpoint 9a	x
Aberdeen Esplanade/Beach	Historical Landmark	Aberdeen AB24 5RZ	0 m to Viewpoint 10	x
Torry Battery	Historical Landmark	Greyhope Rd, Torry, Aberdeen AB11 8QX	0 m to Viewpoint 11, along Coastal Path South	✓
Baron's Cairn	Nature Reserve	Torry, Aberdeen AB12 3HX	0 m to Viewpoint 13	x
Girdle Ness Lighthouse	Lighthouse	1-5 Girdleness Lighthouse Cottage, Torry, Aberdeen AB11 8QX	0 m to Viewpoint 12, along Coastal Path South	✓
Stonehaven Harbour and Pier	Harbour	Old Pier, Stonehaven AB39 2JU	0 m to Viewpoint 17	x
Stonehaven War Memorial	War Memorial	1, Stonehaven AB39 2TJ	0 m to Viewpoint 18, along Coastal Path: Stonehaven to Dunnottar	x
Dunnottar Castle	Ruined Fortress	Stonehaven, AB39 2TL	N/A – not included in SLVIA assessment	✓
Aberdeen/Orkney Ferry Link	Ferry Link	N/A	0 m to Viewpoint 8	x

Table 2.14: Tourism Receptors - Coastal Paths

Receptor	Description	Location	Distance from SLVIA Viewpoint
Coastal Path Boddam to Cruden Bay	Coastal Path	A975, Cruden Bay, Peterhead AB42 0NE	0 m from Viewpoint 2
Coastal Path Whinnyfold North Section	Coastal Path	Whinnyfold	4 m from Viewpoint 4
Coastal Path Collieston Village	Coastal Path	Collieston	8 m from Viewpoint 5
Coastal Path Newburgh Aberdeen City Boundary	Coastal Path	Newburgh, Ellon AB41 6BY Aberdeen, AB23 8WU	0 m to Viewpoint 6 and Viewpoint 7

Receptor	Description	Location	Distance from SLVIA Viewpoint
Murcar Beach Path	Coastal Path	Bridge of Don, Aberdeen AB23 8DS	16 m to Viewpoint 9
Coastal Path Muchalls Village - Road Link	Coastal Path	Muchalls	55 m to Viewpoint 15
Coastal Path Gourdon to Inverbervie	Coastal Path	Inverbervie	9.5 m to Viewpoint 19

2.2.47 Tourism Accommodation with the potential to be impacted by the Proposed Development have been identified using the viewpoints assessed in Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts. Table 2.15 includes tourism accommodation receptors within 100 m of the viewpoints identified within the chapter.

Table 2.15: Tourism Accommodation Receptors

Facility	Description	Location	Distance from SLVIA Viewpoint
Buchanness Lighthouse Holidays	Self-catering Accommodation	Bridge St, Boddam, Peterhead AB42 3NF	90 m from Viewpoint 1
Lighthouse Cottage	Self-catering Accommodation	Greyhope Cottage Girdleness, Greyhope Rd, Torry, Aberdeen AB11 8QX	40 m from Viewpoint 12
Northern Lights Apartments	Self-catering Accommodation	Girdleness Lighthouse Cottage, Torry, Aberdeen AB11 8QX	55 m from Viewpoint 12

2.2.48 There is also a range of marine recreational activities available within the study area, such as paddleboarding, sea-kayaking, yachting and surfing. Volume 2, Chapter 16: Infrastructure and Other Users outlines the prevalence of recreational sailing, boating and motor cruising within the vicinity of the Proposed Development. The chapter notes the highly seasonal and diurnal nature of recreational boating, occurring predominantly in the summer months and during the daytime.

Socio-Cultural Community Values

2.2.49 Socio-cultural values are the beliefs, values, traditions and habits that influence our everyday behaviour. Within communities, shared socio-cultural values can provide a sense of unity and belonging, in addition to supporting the development of Social Capital. Social Capital refers to "*the social connections that contribute to people's quality of life, health, safety, economy and wellbeing in the neighbourhoods where they live*" (Scottish Government, 2020).

2.2.50 Scottish Index of Multiple Deprivation (SIMD) measures deprivation in terms of domains such as income, health, and access to services and can be an indicator of social capital within a community. An analysis of data from the Understanding Society Survey (What Works Wellbeing, 2019) summarises research showing that local area deprivation and social fragmentation strongly influence individual wellbeing, independent of personal circumstances. Residents in the most deprived neighbourhoods experience lower wellbeing, weaker social cohesion, and reduced neighbourhood attachment (What Works Wellbeing, 2019).

Aberdeen City and Aberdeenshire

2.2.51 Aberdeen City and Aberdeenshire are shaped by a strong culture of environmental awareness and community engagement. There is a regional commitment to sustainable growth, responsible land use and biodiversity, as access to nature is a core part of life in the region.

2.2.52 According to 2020 SIMD data, Aberdeen City comprises 283 data zones and has a mixed deprivation profile and Aberdeenshire has 340 data zones with low levels of deprivation. Any pockets of deprivation (nine data zones) are located in the towns of Fraserburgh and Peterhead. SIMD data is summarised in Table 2.16 (see also Volume 2, Chapter 18: Socio-Economics, Tourism and Recreation, Figure 18.3) illustrates the socio-economic deprivation profile in the Regional Socio-economic Study Area.

Table 2.16: SIMD Deprivation – Aberdeen City and Aberdeenshire (Datamap Scotland, 2025; Community Planning Aberdeen, 2023; Aberdeenshire Health and Social Care Partnership, 2024)

	Aberdeen City	Aberdeenshire
Overall Level of Deprivation	Mid-range levels of deprivation.	Lowest levels of deprivation.
Evidence	103,585 residents (45.3%) were living in the three least deprived zones (deciles eight to ten), and 47,146 residents (20.6%) are living in areas corresponding to the three most deprived deciles in Scotland (deciles one to three).	137,117 residents (52.4%) were living in the three least deprived zones (deciles eight to ten) and only 13,640 residents (5.2%) are living in areas corresponding to the three most deprived deciles in Scotland (deciles one to three).
Key Drivers of Deprivation	Poor housing and high crime rates.	Poor access to services.
Change Since 2016	The proportion of data zones in the 40% most deprived areas of Scotland increased from 28% to 33.2%, suggesting a slight increase in deprivation.	The number of data zones in the 20% least deprived areas in Scotland fell by 6.3%, suggesting a slight increase in deprivation.

2.2.53 More recent data shows Aberdeenshire is demonstrating some further signs of widening inequality, with an increase in relative child poverty from 7.6% to 12.1% between 2015 and 2022 (Aberdeenshire Council, 2024).

Angus

2.2.54 In Angus, socio-cultural values include achieving a fairer and more equitable Angus, tackling problems, identifying issues before they become a problem, respecting each other as equal partners and actively caring about each other and our environment (Angus Council, 2023).

2.2.55 In terms of SIMD, the authority has 155 data zones and is experiencing mid-range levels of deprivation (see Table 2.17 below). Locality plans demonstrate ongoing priorities of tackling these inequalities, reducing the carbon footprint, creating employment in renewables (for instance, through Montrose port), and building services around people and communities (Angus Council, 2017).

Table 2.17: SIMD Deprivation - Angus (Datamap Scotland, 2025)

	Angus
Overall Level of Deprivation	Mid-range levels of deprivation.
Evidence	20,837 residents (17.9%) are living in areas corresponding to the three most deprived deciles in Scotland (deciles one to three) and 30,694 residents (26.4%) were living in the three least deprived deciles (deciles eight to ten).
Key Drivers of Deprivation	Pockets of deprivation are more prominent in urban areas and deprivation in terms of access is the worst performing domain.
Change since 2016	The proportion of datazones in the 40% most deprived areas in Scotland rose from 15% to 19%; the proportion in the 20% most deprived areas remained unchanged. Small rise in deprivation.

Coastal communities

2.2.56 The decline of the oil and gas industry has increased economic challenges for the north-east's coastal communities, including increasing inequality and deskilling of labour, leading to higher levels of out-migration compared to other parts of Scotland (Just Transition Commission, 2025; Scottish Government, 2020). Climate also poses a threat to the region, with increasing erosion of coastal infrastructure, which are core to the region's economy, way of life and social identity (Aberdeenshire Council, 2025; Community Planning Aberdeen, 2023). Similarly, in Angus, where nearly two thirds of the population live near or on the coast, increasing flooding and erosion mean communities are facing financial, emotional and physical distress (Angus Council, 2016).

Settlements at Landfall

2.2.57 Socio-cultural values have been identified for the electoral ward of Mearns, as Landfall is located within the ward. Many settlements in Mearns are along "the coastal strip" and the preservation of coastal assets is important for locals, recreationally and economically (Aberdeenshire Community Planning Partnership, 2025). Gourdon is the closest town to Landfall. In Gourdon, the community also value recreation outside, including walking and cycling. Survey responses illustrate that the vast majority of Gourdon's inhabitants (92%) feel a sense of belonging in the community (Aberdeenshire Council, 2024). In terms of SIMD, Gourdon ranks as one of the most deprived in Scotland in relation to access to services and housing (Aberdeenshire Council, 2024).

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