

Economic Profile

Town Centres



Vacancy Rate, April 2017

	North East Fife	Fife
% of Vacant Floor Space	9.6%	17.8%
% of Vacant Units	8.2%	15.3%

Source: GOAD Data (Fife Council) - Latest available data is for April 2017

Geography: North East Fife Area Committee. Vacancy rates include data for Anstruther, Cupar and St Andrews.

Commentary:

- Between 2013 and 2017, North East Fife's vacancy rate by unit increased by 0.3 percentage points. This was mainly driven by an increase in vacant units in Anstruther over the same period.
- Between 2013 and 2017, vacant floor space also increased in North East Fife by 0.7 percentage points. This was also driven by an increase in vacant floor space in Anstruther.
- Despite these slight increases, North East Fife has the lowest vacancy rate out of the Fife areas.

Retail:

- New Look reported a drop in sales in 2017/18. In a turnaround plan, the company is set to cut 1,000 jobs and close 60 stores. New Look has an outlet in Dunfermline, however no stores in Fife are scheduled to close.
- Dixons Carphone reported a fall in profits in June 2018. The retailer is set to close 92 of its more than 700 stores this year. No stores in Fife are scheduled to close.

Employment



Employment rate, 2017

	North East Fife	Fife	Scotland
Employment rate	74.3%	74.8%	74.3%
Employment rate - Female	67.2%	69.0%	70.9%
Employment rate - Male	79.9%	81.0%	77.0%

Source: ONS Annual Population Survey
Geography: North East Fife Area Committee

Employment by occupation, 2017

	North East Fife	Fife	Scotland
High skilled	31.4%	27.7%	29.3%
Technician	26.4%	25.3%	24.5%
Low skilled	!	46.2%	45.7%

Source: ONS Annual Population Survey
Geography: North East Fife Area Committee
! - denotes that the sample size is too small to give a reliable estimate of employment

Commentary:

Employment rate:

- When compared with other areas of Fife, North East Fife has a lower than average employment rate for the working age population (16-64 year olds), as well as for both female and male employment.

Occupation:

- North East Fife has a higher proportion of people employed in high skilled and technical occupations compared with Fife and Scotland. This may be due to employment at the University of St Andrews.
- See the Business Base & Key Sectors section for a full breakdown of employment by industry sector.

Unemployment



Unemployment*, April 2017 – March 2018

	Fife	Scotland
Unemployment rate	4.0%	4.1%

Source: ONS Annual Population Survey

* Unemployment for the North East Fife area is unavailable because the sample size is too small to give a reliable estimate.

Economic Inactivity, April 2017 – March 2018

	North East Fife	Fife	Scotland
Economic Inactivity	24.3%	22.4%	22.5%

Source: ONS Annual Population Survey

Geography: North East Fife Area Committee

Claimant Rate, July 2018

	Claimant Rate
North East Fife Area Committee	1.5%
Ward 16. Howe of Fife & Tay Coast	1.7%
Ward 17. Tay Bridgehead	1.4%
Ward 18. St Andrews	0.6%
Ward 19. East Neuk & Landward	2.4%
Ward 20. Cupar	2.5%
Fife	3.6%
Scotland	2.7%

Source: ONS Claimant Count

Geography: North East Fife Area Committee and wards

Commentary:

- North East Fife's higher than average economic inactivity rate may be attributed to the number of students in the area.
- The claimant rate is the sum of Jobseeker's Allowance claimants and people who are required to search for work on Universal Credit as a percentage of the working age population.
- North East Fife has the lowest claimant rate out of Fife's seven areas. This is driven by the exceptionally low claimant rate in St Andrews which is the lowest claimant rate out of all the Fife wards.
- Cupar has the highest rate in North East Fife, however this was below both the Fife and Scottish average claimant rates in July 2018.

Weekly Earnings



Median Weekly Earnings, 2017

	North East Fife	Fife	Scotland
Resident Earnings	£516.10	£530.50	£547.70
Workplace Earnings	£483.30	£500.00	£547.30

Source: ONS Annual Survey of Hours & Earnings

Geography: North East Fife Westminster Parliamentary Constituency. This boundary captures parts of Leven and Lundin Links.

Commentary:

- Resident earnings reflect those who live in the area, but do not necessarily work in the area, and workplace earnings reflect those who work in the area, but do not necessarily live in the area.
- North East Fife's resident earnings are higher than workplace earnings which suggests that commuting to areas out with the area (i.e. Dundee, Perth and other areas of Fife) might provide higher paid jobs.
- This is similar throughout Fife's areas with resident earnings higher than workplace earnings.
- North East Fife has the lowest median weekly workplace earnings out of the other Fife areas. This may be driven by a higher than average proportion of jobs in the tourism sector and in health and social care (see the Business Base & Key Sectors section).

Qualifications & Skills



Qualifications, 2017

	North East Fife	Fife	Scotland
% 16-64 year olds: No Qualifications	8.3%	7.3%	8.7%
% 16-64 year olds: NVQ4 or above	54.6%	45.0%	43.9%

Source: ONS Annual Population Survey
 Geography: North East Fife Area Committee

Percentage of school leavers achieving a positive destination, 2016/17

	Fife	Scotland
% of school leavers achieving a positive destination	90.9%	92.9%

Source: Scottish Government

School leaver STEM attainment by level and local authority, 2016

	Fife	Scotland
% of all leavers with a STEM subject pass at SCQF level 6+	33.2%	35.4%
% of all leavers with a STEM subject pass at SCQF level 7+	8.0%	8.5%

Source: SQA
 Geography: Not available at a sub-Fife level

Participation in the Culture of Enterprise (CoE) Programme, 2017/18

	NE Fife	Fife
Number of school engagements	21	158
Number of businesses engaged with schools	26	295
Number of pupils participating in CoE activities	677	4,471

Source: Fife Council – Economic Development
 Geography: North East Fife Area Committee

Commentary:

- North East Fife has the highest proportion of 16-64 year olds with qualifications when compared with the other Fife areas.
- 160 pupils across Fife took part in Foundation Apprenticeships (FA) in June 2018. There are 12 different frameworks in the FA programme, including Business Skills, Civil Engineering, Engineering, Financial Services, Scientific Technologies, Children & Young People Social Services, and Software Development.
- Dating back to the early 15th century, the University of St Andrews holds the distinction of being Scotland's first university and the third oldest in the English-speaking world and is recognised worldwide as a leading destination for learning and research.
- Elmwood College in Cupar, is one of six campus locations forming Scotland's Rural College (SRUC). SRUC exists to deliver comprehensive skills, education and business support for Scotland's land-based industries.
- Plans are in place for the new Madras College development at Langlands, St Andrews. The project currently has an anticipated completion date of summer 2021.

Business Base & Key Sectors



UK Business Counts, 2017

	North East Fife	Fife	Scotland
Number of enterprises	2,895	9,575	174,440

Source: ONS UK Business Counts

Geography: North East Fife Westminster Parliamentary Constituency. This boundary captures parts of Leven and Lundin Links.

Financial support to businesses in Fife, 2017/18

	North East Fife	Fife	% of Fife total
Number of businesses supported	16	69	23%
Value of financial support	£52,702	£178,847	29%
Jobs created as a result of financial support to businesses	46.5	192.5	24%

Source: Fife Council – Economic Development

Geography: North East Fife Westminster Parliamentary Constituency. This boundary captures parts of Leven and Lundin Links.

Number of start-ups supported by Business Gateway Fife, 2017/18

	North East Fife	Fife	% of Fife total
Number of businesses receiving Expert Help	40	139	29%
Number of businesses accessing business growth services	14	54	26%
Business Gateway supported start-ups:			
No. of Business Gateway start-ups	112	468	24%
No. of jobs created from Business Gateway	141	609	23%
Turnover generated	£3,791,000	£17,740,680	21%

Source: Business Gateway Fife

Geography: North East Fife Area Committee

Employment by sector, 2016

	North East Fife	Fife	% of Fife total
A : Agriculture, forestry and fishing*	75	200	38%
B : Mining and quarrying	30	300	10%
C : Manufacturing	1,250	15,000	8%
D : Electricity, gas, steam and air conditioning supply	25	450	6%
E : Water supply; sewerage, waste management and remediation activities	50	1,250	4%
F : Construction	1,000	9,000	11%

	North East Fife	Fife	% of Fife total
G : Wholesale and retail trade; repair of motor vehicles and motorcycles	4,000	21,000	19%
H : Transportation and storage	600	5,000	12%
I : Accommodation and food service activities	3,500	9,000	39%
J : Information and communication	200	4,000	5%
K : Financial and insurance activities	125	4,000	3%
L : Real estate activities	350	1,250	28%
M : Professional, scientific and technical activities	1,000	7,000	14%
N : Administrative and support service activities	1,000	7,000	14%
O : Public administration and defence; compulsory social security	400	13,000	3%
P : Education	4,000	10,000	40%
Q : Human health and social work activities	2,500	19,000	13%
R : Arts, entertainment and recreation	1,500	4,500	33%
S : Other service activities	1,000	4,000	25%

Source: ONS Business Register & Employment Survey * Excludes farm agriculture.

Geography: North East Fife Area Committee

Commentary:

- North East Fife is home to employers including Fairmont St Andrews, Fishers Services, Kettle Produce, Quaker Oats, NHS Fife and St Andrews University.
- 26 businesses listed in Fife Council Economic Development's Top 200 are located in North East fife. These businesses are account managed by Economic Development due to their size, turnover or importance to the local economy.

Employment:

- North East Fife also has the highest proportion of activity within the Category Q: Human health and social work sector, accounting for 33% of the Fife total.

Agriculture:

- Although the above figures do not include farm agriculture, they do show that North East Fife accounts for 38% of Fife's total employment in the sector – this is a higher proportion than other Fife areas.
- Scottish fruit and vegetable producers have drawn up a new strategy to boost the industry in response to Brexit. Business leaders fear it could be hit by a slowdown in European exports and a shortage of workers once the UK leaves the European Union.

Recent business activity:

- St Andrews Brewing Company launched a crowdfunding campaign in June 2018 to fund plans for a new bar at the Caird Hall in Dundee and expansion of the company's brewery at Bassaguard Business Park in St Andrews.
- Stewarts Leisure Parks, which operates three holiday parks in Perthshire and Angus, is to create a new £20 million facility in Fife. Planning permission is in place for the new Scarbrooke Park development on Largo Ward Road, four miles south of St Andrews.

Tourism



Tourism Indicators, 2016

	St Andrews	North East Fife	Fife
Total day trips	2,505,000	1,295,000	7,830,000
Visitor spend	£65,778,000	£52,516,000	£413,107,000
Tourism value	£168,288,000	£103,027,000	£565,990,000
Actual tourism related employment	3,446	2,159	11,568
Percentage of all employment	4%	10%	9%

Source: Fife Council – Tourism

Geography: North East Fife does not include St Andrews or the East Neuk.

Commentary:

- St Andrews is known worldwide as the home of golf. Visitor spend in St Andrews was over £65 million in 2016 and accounted for 16% of the total visitor spend in Fife.
- In the same year, 30% of the total tourism value was generated in St Andrews, with 18% generated in the rest of North East Fife (not including the East Neuk).
- Whilst tourism accounted for 4% of St Andrews employment, the sector accounted for 10% of the total employment in the rest of North East Fife (except the East Neuk).
- In regard to actual tourism employment, St Andrews account for 30% of Fife's overall total, whilst North East Fife accounted for 18%
- St Andrews University attracts students and staff from over 140 countries and currently has around 8,000 undergraduates and 2,000 postgraduate students.
- The iconic West Sands, St Andrews holds a Keep Scotland Beautiful Beach Award and was named best UK beach in a 2018 survey by finance website www.satsuma.co.uk.
- The East Neuk coastline from Lundin Links to St Andrews and on to Newburgh forms a significant part of the 117-mile Fife Coastal Path stretching from the Forth to the Tay. St Andrews will also form the end point of the new Fife Pilgrim's Way opening in 2019.
- Abbeyford Leisure officially launched the opening of 20 new Castaway holiday homes at Elie Holiday Park in June 2018. The new development by has almost trebled the number of properties available for hire at the park.
- Approval granted by FC in June 2018 for a major new £20m luxury lodge holiday park development by Gleneagles Holiday Parks Ltd at Northbank Farm near Largoward.
- MND Scotland is to invest £250,000 in the development of a new bespoke accessible holiday lodge at Clayton Caravan Park near St Andrews. The lodge will form art of the charity's accessible holiday service for people affected by Motor Neurone Disease and other disabilities. Work is expected to start towards the end of 2018
- Bus operator Stagecoach has announced a new service to Scotland's Secret Bunker over the school holidays. The new 93 bus service will provide direct links between Leven, St Andrews, Anstruther and the popular tourist attraction.
- Major events in North East Fife during 2018 include: the Senior Open, Alfred Dunhill Links Championship, StAnza Poetry Festival, Bowhouse Food Weekend, Fife Food Festival, Fife Agricultural Show, Crail Food Festival, Pittenweem Arts Festival, East Neuk Festival, Eliminator Bike Festival, and St Andrews Voices vocal music festival.
- In August 2018, the Scottish Government announced funding to support studies into the feasibility of a new rail link to St Andrews with stops at Newburgh and Oudenarde.
- Caledonian Sleeper recently demonstrated its commitment to Fife with the opening of a new guest lounge at Leuchars railway station in July 2018.

Economic Priorities

Economy, Planning & Employability Services leads the economic regeneration agenda for Fife Council. The Service's Business & Employability Portfolio has responsibility for delivering the Council's economic development and employability activities.

The Service's economic development and employability priorities are governed by Fife's Economic Strategy 2017/2027 which sets out how Fife Council, the Fife Economy Partnership and Opportunities Fife Partnership will work together towards achieving stronger, sustainable and more resilient economic growth for Fife which is shared by all. In order to make a difference four priorities have been identified where actions will be targeted:

- Achieving fairer, more **inclusive growth**;
- Increasing **investment** in Fife's business infrastructure;
- Improving business growth through increased **internationalisation**, sales and exports; and
- Fostering a culture of **innovation** and enterprise.

Below are the key Service priorities for North East Fife that have been identified by the Service.

Town Centres

- Provide support to BID St Andrews as required.
- Develop and deliver a digital improvement district for Cupar.
- Complete the Cupar CARS and THI project with partners Fife Historic Buildings Trust.
- Work with Cupar Development Trust and Kingdom Housing to advance proposals for the Inner Court development and Bonnygate gap site.

Tourism

- Work in partnership with the Tay Cities local authorities to deliver a regional tourism campaign.
- Support the Church tourism route in Cupar and North Fife.
- Implement the V&A regional marketing campaign.
- Deliver the Fife Tourism & Events strategy objectives and outcomes.
- Support the Communities teams to develop a tourism asset log for Fife.
- Support the Local Tourist Associations and the thematic groups to deliver local area tourism campaigns.
- Maintain Fife's World Host Destination status.
- Support the Fife Coast and Countryside Trust to deliver the Fife Pilgrim Way and to maintain interest in the Fife Coastal Path as major tourism assets.
- Continue to deliver strong tourism campaigns through Welcome to Fife website and social media channels.

Regeneration

- Support the delivery of the community hub project at the former Abertay works site in Tayport. Particularly in the context of allocations of both Vacant and Derelict Land Fund and Regeneration Capital Grant Fund monies.
- Support development and delivery of the University of St Andrews Eden Campus.

- Ensure focus on vacant and derelict land sites, including consideration of sites for inclusion on the Vacant and Derelict Land Register for Fife.
- Consider sources of funding that could contribute towards the reduction of vacant and derelict land across the area.
- Consider sites/projects that could benefit from national capital regeneration funding.

Property & Investment

- Promote and enable the agreed Edinburgh and South East Scotland City Region Deal investment programme, including the £40 million Industrial Estates Regeneration Programme.
- Continue to promote employment land and premises to secure investment and jobs in the local economy.
- Continue to promote and safeguard employment land provision in accordance with Fife Council's Fife Employment Land strategy.
- Continue to provide and manage commercial property portfolio throughout Fife to support SMEs.

Investment

- Support development and delivery of the University of St Andrews Eden Campus development at Guardbridge, including the delivery of Tay Cities Deal funding support.
- Secure the provision of additional employment land and business property through the implementation of St Andrews SDA.
- Continue to deliver the Invest in Fife initiative on behalf of Fife Council delivering a range of activities aimed at attracting jobs and investment into the Fife economy.
- Deliver area-based and sectoral action plans with focused activities and developments specifically targeted at encouraging investment from key industry sectors including offshore wind, energy systems and storage, fintech, food and drink, and hotels, leisure and cruise activity.

Employability

- Deliver the Opportunities Fife Partnership Strategic Plan's objectives and outcomes.
- Continue to target specific client groups, with tailored employability support packages if required. This includes clients with health and disability issues (with a particular focus on those whose mental health is a barrier to their employment), in work poverty, young people who are in danger of entering into or have left school in a negative destination, disadvantaged families and the long term unemployed (with a focus on those who have never worked).
- Provide employability support and training to those who have been made redundant or are facing redundancy. Empower young people to access positive destinations.
- Continue to provide training and skills development to progress more people into employment.
- Deliver training-led activities for skills development by engaging with the locality to provide physical improvements to the local area. This includes allotment work, environmental and public realm improvements.
- Continue to work with Skills Development Scotland to promote and deliver programmes within the apprenticeship family (Foundation, Modern and Graduate Apprenticeships). Engage with schools to support young people who are unlikely to achieve a positive destination.

- Continue to work with local employers to provide support for upskilling staff.
- Deliver sector-led academies (such as construction, engineering and hospitality) which provide pre-employment support that gives clients greater access to opportunities.

Enterprise & Business Development

- Support the LEADER team to identify and support businesses in rural areas of Fife to diversify or bring to the market new, innovative products, primarily in the food & drink and tourism.
- Continue to deliver the Culture of Enterprise programme to schools throughout Fife.
- Work with the Social Enterprise Academy to create a social enterprise in every school in Fife.
- Develop the Food & Drink Action Plan, in conjunction with Food from Fife, to build on the success of our artisan SMEs.
- Continue to deliver in partnership with BRAG and Fife Voluntary Action the Social Enterprise Development Plan to capitalise on the growing interest in the social impact business model.
- Continue to support and strengthen businesses within Fife's manufacturing sector through the Manufacturing Resilience Programme. This also includes continuing work with Fife College to deliver modern training qualifications and providing Expert Help programmes to company Boards.
- Continue to support Fife businesses to win contracts from the public sector through the Supplier Development Programme.
- Work with the Fife Council Procurement team to help businesses understand the community benefits clause in order for them to maximise their tender score and deliver social benefits that support the Plan for Fife.
- Continue to develop the Trade Development Programme to help businesses take part in exhibitions, or participate in learning journeys, in a wide range of industry sectors. Work with partners to provide advice and support to businesses.