

Introduction

This profile provides an overview of the characteristics and performance of Fife’s labour market and business base. It also provides a summary of the business support activity carried out by Fife Council in 2021/22. The profiles are based on a range of publicly available socio-economic data. Whilst much of the data have a time lag, the figures presented are the most up-to-date available at the time of writing.

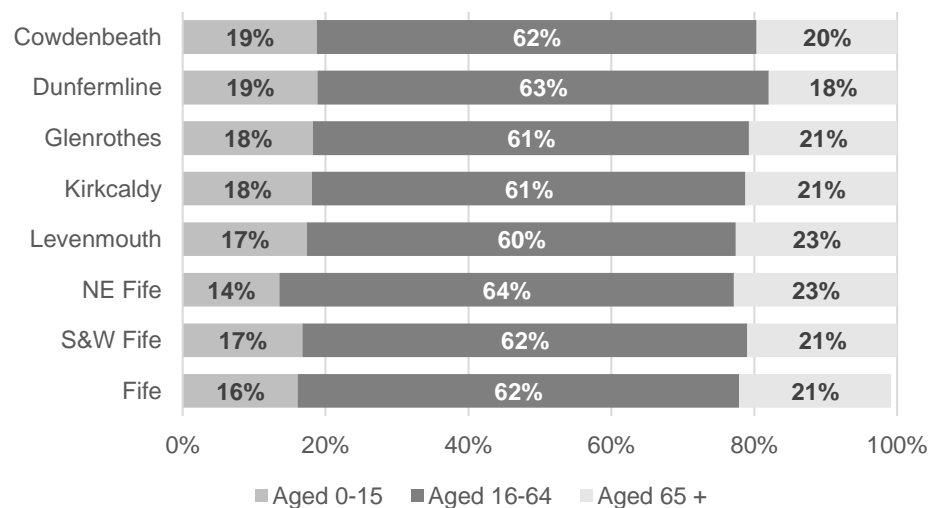
Unless otherwise stated, the data are broken down to the areas covered by each of Fife Council’s seven [Local Area Committees](#).

Population

Figure 1: Mid-2020 Population Estimates; Fife and Local Area Committee Geographies

Cowdenbeath Area	City of Dunfermline	Glenrothes Area	Kirkcaldy Area	Levenmouth	North East Fife	South & West Fife	Fife
41,491	59,943	49,871	60,417	37,722	75,557	49,129	374,130

Figure 2: Population Structure



Around 374,130 people live in Fife, 6.8% of Scotland’s population (Figure 1).

Looking at the population structure of Fife and its committee areas (Figure 2):

- Levenmouth has the smallest proportion of people of working age (aged 16 to 64 years) (60%).
- North East Fife and Levenmouth have the highest proportions of people aged over 65 (23%) whilst Dunfermline has the lowest (18%).
- North East Fife has the largest proportion of people who are of working age (64%), and the lowest proportion of children (14%).

Source: Mid-2020 Electoral Ward Population Estimates, National Records of Scotland.

Employment

Figure 3: Employment Rates, Jan-Dec 2021

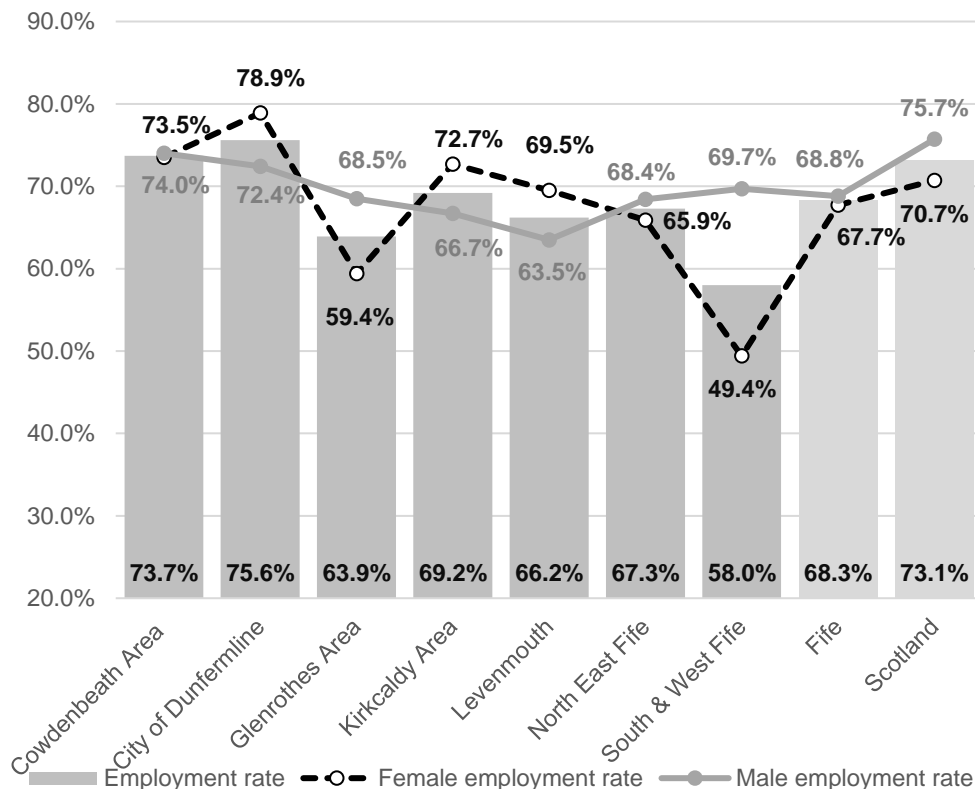
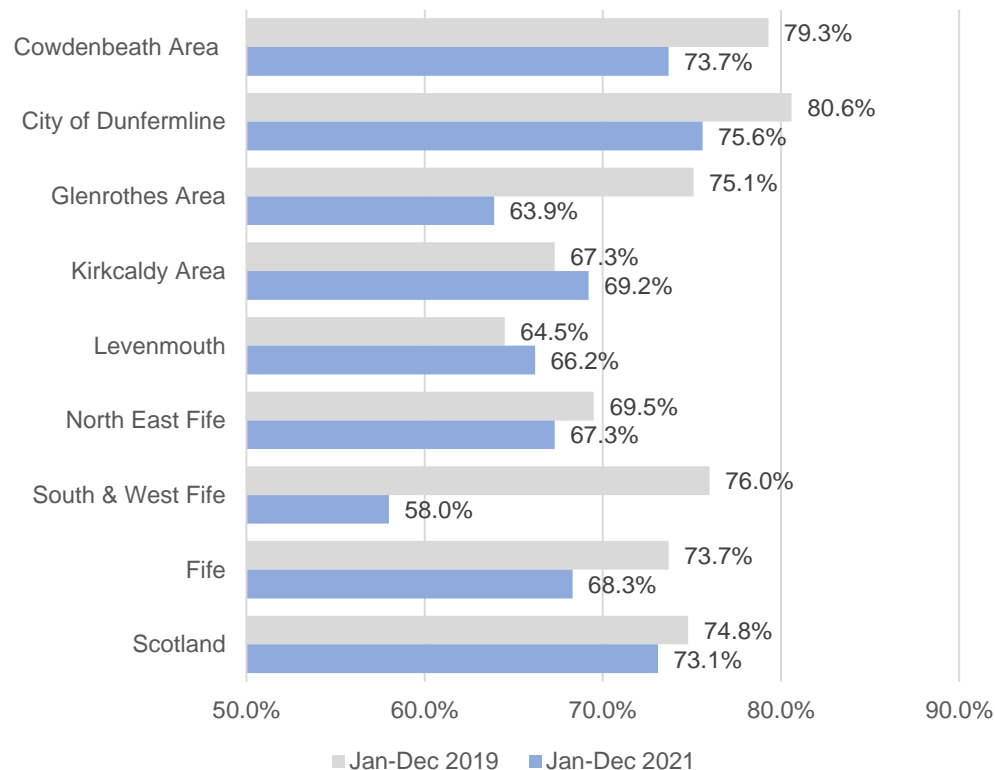


Figure 4: Employment Rate Change 2019-2021



Latest Employment Rates*:

Dunfermline's employment rate (75.6%) is the highest in Fife and above the rate for Scotland as a whole (73.1%) (Figure 3).

The employment rates in the Glenrothes Area, Levenmouth and South & West Fife are considerably lower than the Fife and Scottish rates.

South & West Fife's latest employment rate is the lowest of all the committee areas in Fife (58.0%).

In Dunfermline, the Kirkcaldy Area and Levenmouth, the female employment rate is higher than the male; in the Glenrothes Area, South & West Fife and North East Fife, the male employment rate is significantly higher than the female (Figure 3).

Please Note: As these employment estimates are obtained from a national survey, rates for committee areas should be viewed with caution due to small sample sizes at this geographic level.

Employment Rate Change:

Between 2019 and 2021, estimated employment rates fell in almost all parts of Fife as a result of the impact of the Covid-19 pandemic (Figure 4). Fife's employment rate fell from 73.7% in 2019 to 68.3% in 2021 meaning that more than three in ten of the region's working age population were unemployed or economically inactive (see sections below).

The highest falls in employment rates were seen in South & West Fife (-18.0 % points) and the Glenrothes Area (-11.2 % points).

The Kirkcaldy Area was the only area to see its employment rate increase to above the 2019 pre-pandemic level.

Please Note: As these employment estimates are obtained from a national survey, rates for committee areas should be viewed with caution due to small sample sizes at this geographic level.

Source: ONS Annual Population Survey, Jan-Dec 2021.

Note: *employment rate = the percentage of the working age populations (aged 16-64) who are in employment.

Unemployment

Figure 5: Unemployment in Fife, Scotland and Great Britain

	2019	2020	2021
Fife (number of people)	7,300	8,600	6,700
Fife (%)	4.1%	4.9%	4.1%
Scotland (%)	3.3%	4.3%	3.9%
Great Britain (%)	3.9%	4.7%	4.4%

The latest unemployment figures for Fife are for the 12 months to December 2021.

Between 2019 and 2020, Fife's unemployment rate increased from 4.1% to 4.9% as an estimated additional 1,300 people became unemployed.

Between 2020 and 2021, Fife's unemployment rate fell back to its pre-pandemic level of 4.1% as the estimated number of people unemployed fell by 1,100.

Although Fife's latest unemployment rate is higher than the Scottish rate, the gap is narrower than before the pandemic.

Source: ONS Annual Population Survey, Jan-Dec 2019, 2020 and 2021. Note: Numbers and % are for those aged 16 and over. % is a proportion of economically active. Unemployment figures are not shown below the Fife level as sample sizes are too small for reliable estimates.

Economic Inactivity

Figure 6: Proportion of the working age population who are economically inactive, Jan-Dec 2021

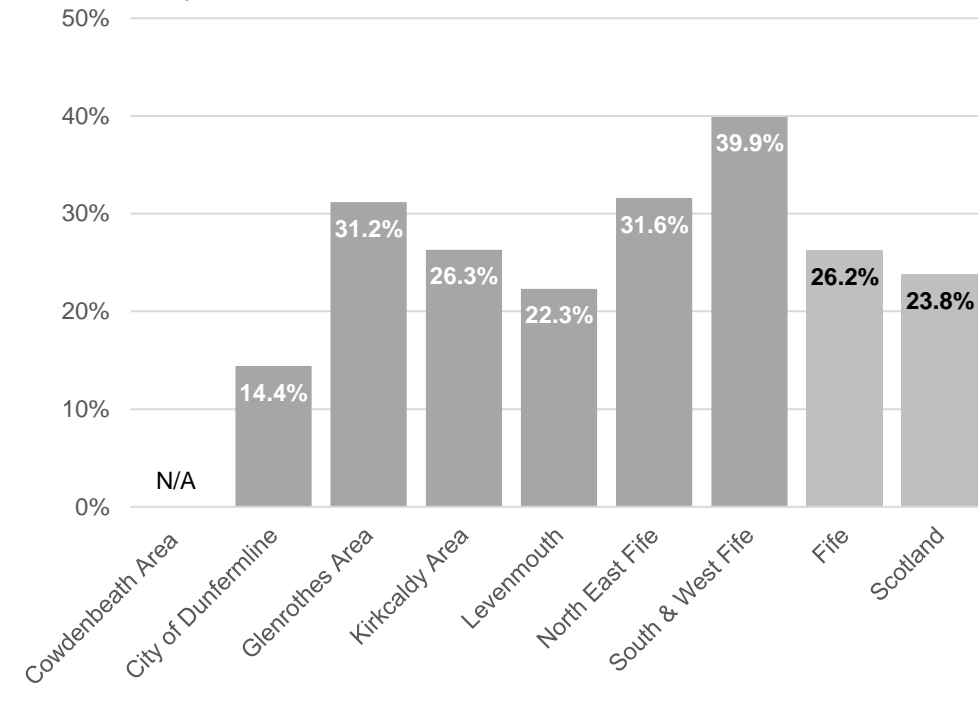
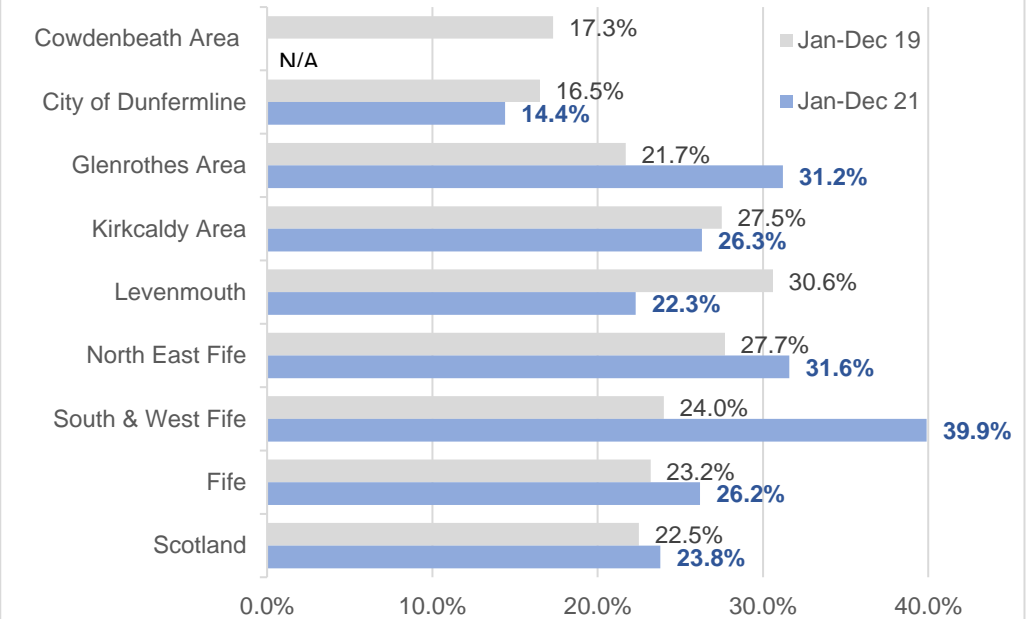


Figure 7: Change in the proportion of the working age population who are economically inactive, 2019-2021



Between 2019 and 2021, Fife's economic inactivity rate increased from 23.2% to 26.2%. The Glenrothes Area and South & West Fife saw significant increases in the proportion of their populations who were economically inactive. In Dunfermline, the Kirkcaldy Area and Levenmouth inactivity rates fell (Figure 7).

Two committee areas have economic inactivity rates that are lower than the Fife and Scottish rates – Dunfermline and Levenmouth (Figure 6).

South & West Fife has the highest economic inactivity rate (over 13 percentage points higher than the Fife and Scottish averages) followed by the Glenrothes Area and North East Fife.

No reliable 2021 estimates are available for the Cowdenbeath Area.

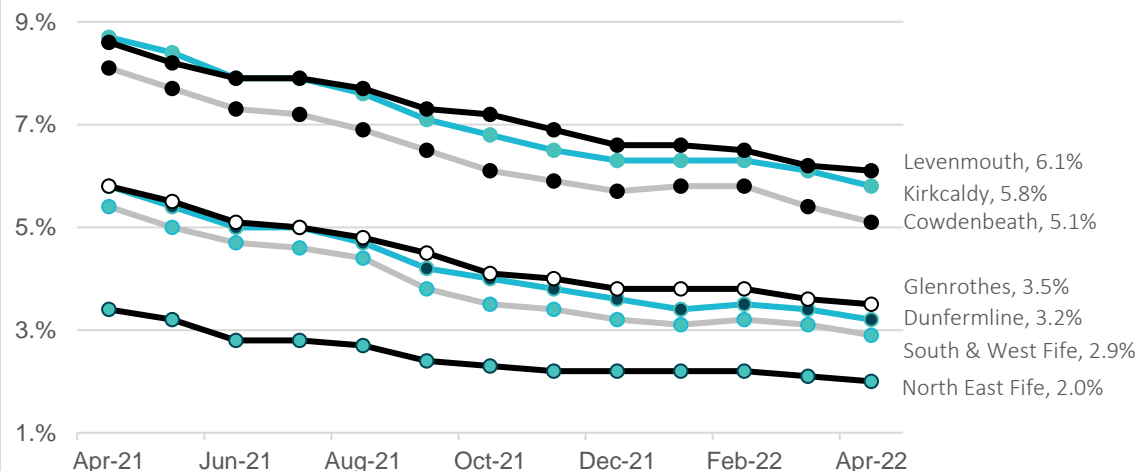
Please Note: Due to small sample sizes at committee area levels, all these figures should be viewed with caution.

Source: ONS Annual Populations Survey, Jan-Dec 2019 and 2021.

Note: Economically inactive is defined as people who are neither in employment nor unemployed (ie not seeking work).

People Claiming Out-of-work Benefits

Figure 8: Claimant rates – Fife Area Committees, April 2021-April 2022



North East Fife has the lowest claimant rate of all the area committees (Figure 8).

Levenmouth and the Kirkcaldy Area have the highest claimant rates; this has been the case for some time.

All claimant rates in Fife increased significantly in 2020 and remained considerably higher than pre-pandemic levels until they started to fall in April 2021.

In the Cowdenbeath, Dunfermline and Glenrothes Areas and Levenmouth, the latest rates (April 2022) are the same or lower than in 2019. Claimant rates and numbers are still higher than before the pandemic in the Kirkcaldy Area, North East Fife and South & West Fife (Figure 9).

Source: ONS Claimant Count.

Note: The claimant rate is the percentage of working age (16-64yrs) residents claiming out-of-work benefits.

Figure 9: Claimant count and rate change 2019 to April 2022

Area Committee	2019 Average		April 2022		Difference	
	Claimant Rate	Claimant Count	Claimant Rate	Claimant Count	Claimant Rate	Claimant Count
Cowdenbeath	5.1%	1,328	5.1%	1,320	0.0%	-8
Dunfermline	3.3%	1,213	3.2%	1,185	-0.1%	-28
Glenrothes	3.6%	1,108	3.5%	1,065	-0.1%	-43
Kirkcaldy	5.5%	2,002	5.8%	2,140	+0.3%	+138
Levenmouth	6.4%	1,450	6.1%	1,375	-0.3%	-75
North East Fife	1.7%	762	2.0%	905	+0.4%	+143
South & West Fife	2.7%	836	2.9%	900	+0.2%	+64
All Fife	3.8%	8,753	3.9%	8,950	+0.1%	+197

Occupational Skills

Dunfermline has the highest proportion of people employed in elementary occupations (16.6%) and Levenmouth the lowest (8.0%).

The Cowdenbeath Area has a higher-than-average proportion of people employed in lower-middle skilled jobs with over 40% of jobs in these occupations. This is the highest rate of employment in these occupations of Fife's committee areas.

The Cowdenbeath Area and Levenmouth have a significantly lower proportion of people employed in high skilled jobs such as managers, directors and professionals than Fife and Scotland as a whole, and the lowest proportions of all of Fife's committee areas (19.6% and 21.7% respectively).

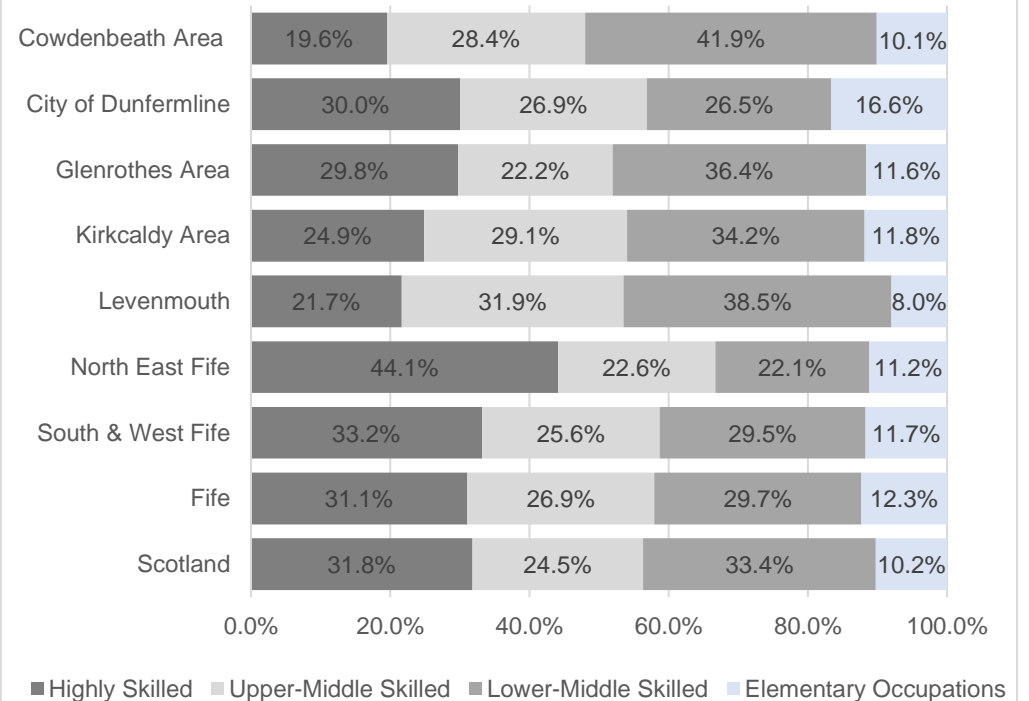
North East Fife has the highest rate of employment of the Fife area committee areas in high skilled jobs (44.1%).

Source: ONS Annual Population Survey, Jan-Dec 2019,20 & 21.

Note: High Skills: managers, directors, senior officials & professional occupations; Medium-High Skills: associate professional & technical & skilled trade occupations; Medium-Low Skills: admin, secretarial, caring, leisure, sales & customer service occupations & process, plant & machine operatives; Elementary: elementary trades, admin & service occupations.

These estimates should be viewed with caution due to small sample sizes at the area committee level; three-year averages (2019-21) are therefore given for qualifications by committee area.

Figure 10: Employment by Occupation, 2019-21



Qualifications & Skills of Population

Figure 11: Qualifications; Fife 2018-2021	2018	2019	2020	2021
% of working age population with NVQ 4+ (HND, degree or higher degree)	44.0%	43.3%	51.3%	51.0%
% of working age population with no formal qualifications	8.2%	7.3%	5.9%	7.0%

Figure 12: Proportion of 16-64-yr-olds with No Qualifications, 2019-21

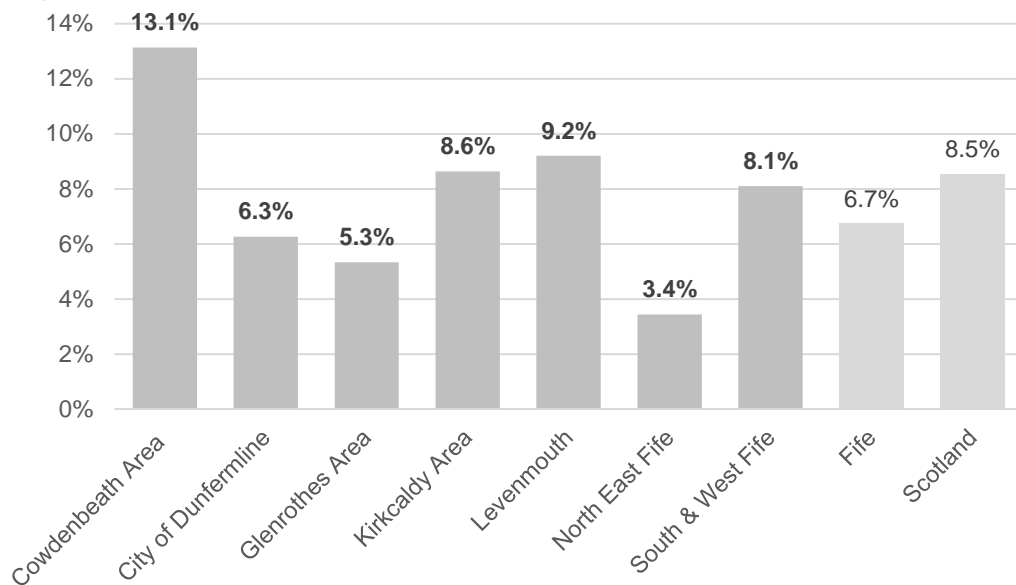
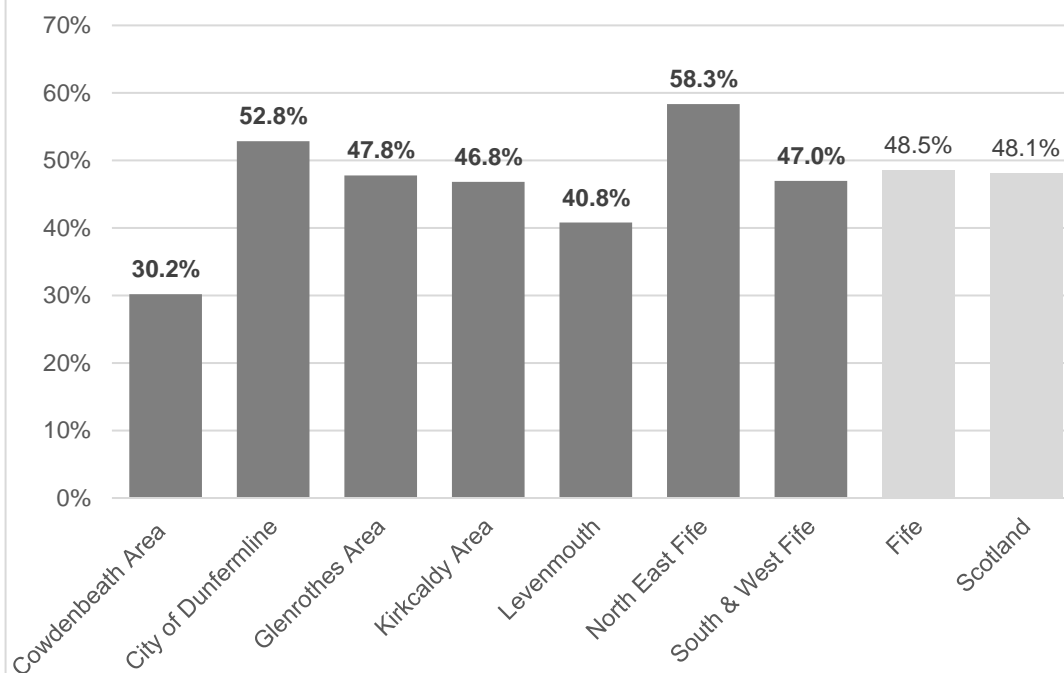


Figure 13: Proportion of 16-64-yr-olds qualified to NVQ 4 or above, 2019-21



2018-2021 Trend:

The qualifications of Fife’s working age population showed steady improvement between 2018 and 2020, when the proportion of those aged 16-64 with a NVQ 4 or higher qualification increased from 44% to over 50% and the proportion with no qualifications fell from 8.2% to 5.9% (Figure 11). Between 2020 and 2021 however, the proportions with NVQ 4+ fell and with no qualifications increased.

Qualifications by Committee Area:

The Cowdenbeath Area has a significantly higher proportion of its working age population with no qualifications (13.1%) than Scotland and Fife as a whole (8.5% and 6.7% respectively), and the highest proportion of all Fife’s committee areas. The area also has the lowest proportion of people who are qualified to NVQ 4 or above (30.2%) (Figures 12 & 13).

Levenmouth and the Kirkcaldy Area also have higher proportions of their populations with no qualifications than Fife and Scotland overall and lower rates qualified to NVQ 4 or above.

North East Fife has the lowest percentage (3.4%) of its working age population with no qualifications out of all the committee areas in Fife.

North East Fife also has the highest proportion (58.3%) of people qualified to NVQ 4 or above.

Source: ONS Annual Population Survey

Notes: These estimates should be viewed with caution due to small sample sizes at the area committee level; three-year averages (2019-21) are therefore given for qualifications by committee area. NVQ 4 and above qualifications = HND, degree and higher degree level qualifications or equivalent. No qualifications = no formal qualifications held.

School Leaver Destinations and Attainment

Figure 14: School Leaver Destinations and Attainment 2020/21

	Fife	Scotland
Percentage of school leavers achieving a positive initial destination*	93.9%	95.5%
Percentage of school leavers achieving 1+ SCQF Level 5 or better	81.3%	87.7%
Percentage of school leavers achieving 1+ SCQF Level 6 (Higher) or better	58.7%	66.0%

93.9% of Fife's 2020/21 school leavers achieved a positive initial destination*.

These figures are higher than Fife's 2019/20 school leavers, 91.9% of whom who achieved a positive initial destination, but lower than the proportion of 2018/19 school leavers gaining a positive initial destination (94.4%).

Fife's rate of increase was lower than the Scottish rate so that the gap between the Fife and Scottish rates has continued to widen.

The percentages of 2020/21 school leavers achieving at least one SCQF Level 5 or 6 are below the figures for Scotland as a whole but are higher than the percentages achieving both qualifications in 2019/20.

Source: Scottish Government, Summary Statistics for Attainment and Initial and Follow-up Leaver Destinations No 3, 2021 Editions.

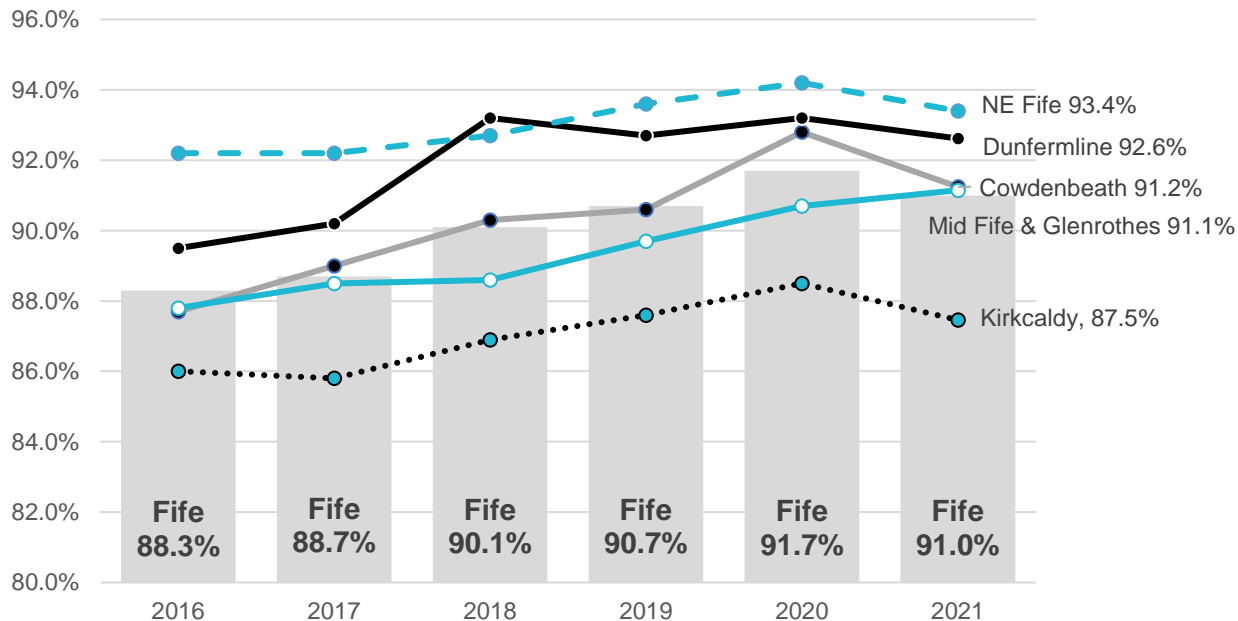
Note: * A young person is deemed to be in a positive destination when they are actively engaged with an organisation for the purpose of learning, training or work (work includes volunteering).

Annual Participation Measure for 16-19 Year Olds

Figure 15: Percentage of 16–19 year olds participating in education, training or employment 2016-2021, Fife and Scotland

Year	Fife					Scotland				
	16-19 year olds	16-year olds	17-year olds	18-year olds	19-year olds	16-19 year olds	16-year olds	17-year olds	18-year olds	19-year olds
2016	88.3%	98.6%	93.5%	84.8%	77.0%	90.4%	98.7%	93.9%	88.0%	81.7%
2017	88.7%	98.9%	91.7%	86.8%	78.3%	91.1%	98.8%	90.4%	88.9%	83.4%
2018	90.1%	98.7%	93.5%	86.8%	82.3%	91.8%	98.9%	94.6%	89.9%	84.5%
2019	90.7%	99.1%	93.6%	88.2%	82.2%	91.6%	99.0%	94.8%	89.1%	83.9%
2020	91.7%	98.6%	94.5%	89.6%	84.1%	92.1%	99.0%	95.0%	90.4%	84.1%
2021	91.0%	99.0%	92.6%	87.1%	85.0%	92.2%	99.1%	94.3%	89.4%	85.4%

Figure 16: Percentage of 16-19 year olds participating in education, training or employment 2016-21; by Scottish Parliamentary Constituency



Fife saw the proportion of its 16-19 year olds participating in education, training or employment increase steadily from 88.3% in 2016 to 91.7% in 2020, before the rate fell slightly (by 0.7 percentage points) in 2021 (Figure 15).

All parts of Fife had seen participation increase between 2016 and 2020, and all saw participation fall between 2020 and 2021, apart from Mid Fife and Glenrothes.

The largest increases in participation between 2016 and 2020 were in the 18 and 19 year age groups (Figure 15)

Between 2020 and 2021, the participation rate increased for 16 and 19 year olds, but fell for 17 and 18 year olds (Figure 15).

Source: Skills Development Scotland, Annual Participation Measure of 16-19 year olds in Scotland, 2021.

Fife Council's Culture of Enterprise Programme

Figure 17: Participation in Fife Council's Culture of Enterprise (CoE) Programme, 2021/22

	Cowdenbeath Area	City of Dunfermline	Glenrothes Area	Kirkcaldy Area	Levenmouth	North East Fife	South & West Fife	Fife
Number of different CoE activities in which schools participated	8	10	9	10	9	11	8	19
Number of businesses engaged with schools ¹	0	0	2	1	1	1	0	5
Instances of pupil engagement with CoE activities 2021/22 ²	11,293	30,680	13,679	6,835	12,452	8,990	28,123	112,052
<i>Instances of pupil engagement with CoE activities 2020/21²</i>	<i>3,507</i>	<i>11,360</i>	<i>1,130</i>	<i>873</i>	<i>778</i>	<i>3,309</i>	<i>1,191</i>	22,148

Dunfermline had more instances of pupil engagement with the council's Culture of Enterprise activities than any other committee area followed by South & West Fife.

In all parts of Fife there was a significant increase in the number of pupils participating in 2021/22 compared with 2020/21 due to a continued increase in the delivery of virtual activities and more schools having the capacity to be involved following the lifting of restrictions.

Source: Fife Council – Economic Development.

Notes:

1. Number of businesses engaged with schools = businesses located in each committee area who have engaged with schools in Fife.
2. Instances of pupil engagement = the number of pupils participating multiplied by the number of weeks they were involved in the programme (discounting school holidays).

Earnings

Resident earnings represent the earnings of people who live in the area, but do not necessarily work in the area. Workplace earnings are the average earnings of those who work in the area, but do not necessarily live in the area.

Dunfermline & West Fife has the highest workplace earnings and North East Fife the highest resident earnings.

The Glenrothes constituency has the lowest resident earnings in Fife, and North East Fife the lowest workplace earnings. North East Fife's workplace earnings are £65.80 lower than its resident earnings.

Dunfermline & West Fife and North East Fife have the highest proportions of employee jobs earning below the real living wage (Figure 19).

Source: ONS Annual Survey of Hours and Earnings.

Areas: UK Parliamentary Constituencies.

Note: These estimates should be viewed with caution. Estimates for 2020 and 2021 include furloughed employees and are based on actual payments made to the employee from company payrolls, and the hours on which this pay was calculated, which in the case of furloughed employees are their usual hours. Both the 2020 and 2021 ASHE surveys saw lower response rates than usual. As the data is based on PAYE it does not include the self-employed.

Figure 18: Median Weekly Earnings, April 2021: UK Parliamentary Constituency Areas, Fife, Scotland

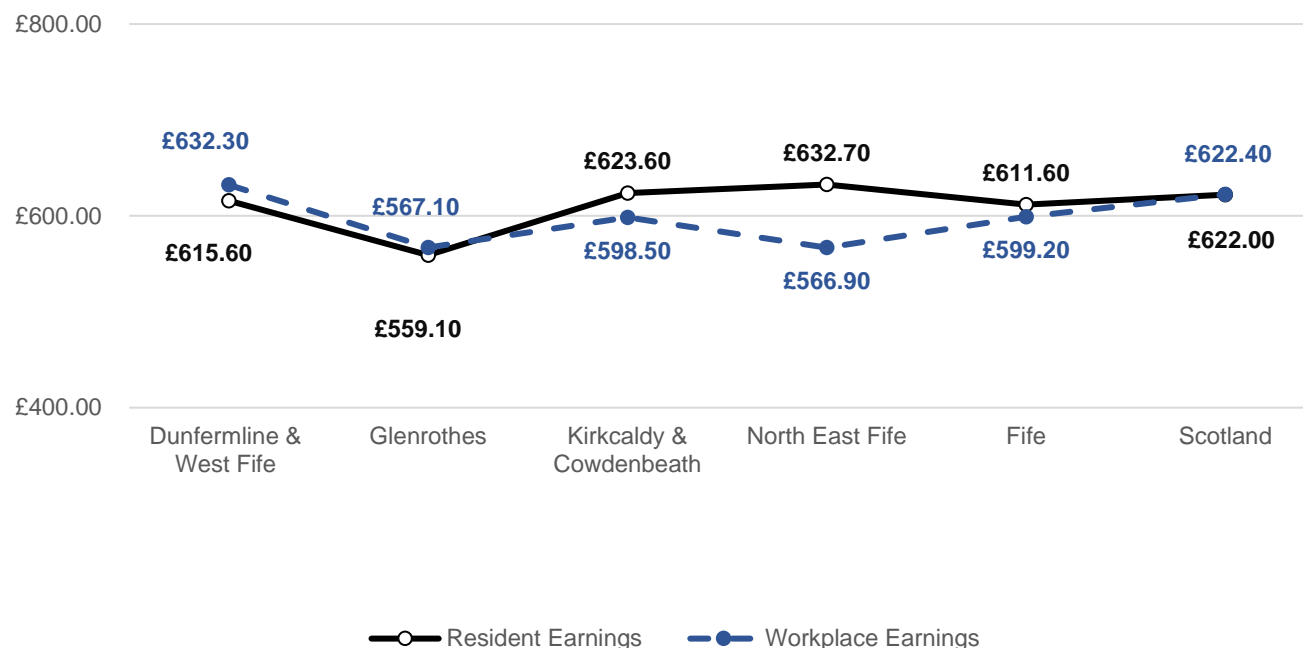


Figure 19: Percentage of employee jobs earning below the Living Wage Foundation Rates

Area/Parliamentary Constituency	Apr-15	Apr-16	Apr-19	Apr-20	Apr-21
Dunfermline & West Fife	21.0%	21.5%	21.6%	12.1%	20.4%
Glenrothes	17.2%	16.7%	15.9%	14.2%	14.6%
Kirkcaldy & Cowdenbeath	25.0%	25.5%	18.6%	14.5%	14.5%
North East Fife	37.1%	30.3%	20.1%	21.4%	18.7%
Fife	21.6%	18.9%	18.9%	14.9%	17.0%
Scotland	19.6%	20.1%	16.8%	15.1%	14.4%

Business Base & Key Sectors

Number and Size of Businesses

Figure 20: Number of Enterprises 2021: Scottish Parliamentary Constituency Areas (SPCAs), Fife, Scotland

	Cowdenbeath SPCA	Dunfermline SPCA	Kirkcaldy SPCA	Mid Fife & Glenrothes SPCA	North East Fife SPCA	Fife	Scotland
Number of Enterprises March 2021	1,760	1,970	1,820	1,620	2,465	9,535	175,400
Percentage of Fife Total	18.5%	20.7%	19.1%	17.0%	24.8%	-	-
Change 2020-2021	-170	-50	-85	-10	-45	-365	-2,295
Percentage Change 2020-2021	-8.8%	-2.5%	-4.5%	-0.6%	-1.9%	-3.7%	-1.3%

Change in Number of Businesses 2020-2021:

Between March 2020 and March 2021, the number of businesses in Fife fell by 365 or -3.7%. This followed a period of sustained growth since 2015. The number of businesses fell in all of Fife's SPCAs. Cowdenbeath SPCA saw the largest fall (170 businesses or -8.8%); Mid-Fife and Glenrothes had the smallest fall (10 fewer businesses or -0.6%) followed by North East Fife (45 fewer businesses or -1.9%).

The highest decrease in numbers (-350 businesses) was within the micro (0-9 employees) size band. Cowdenbeath, Dunfermline and North East Fife all saw a fall in the number of medium-sized businesses (Figure 21).

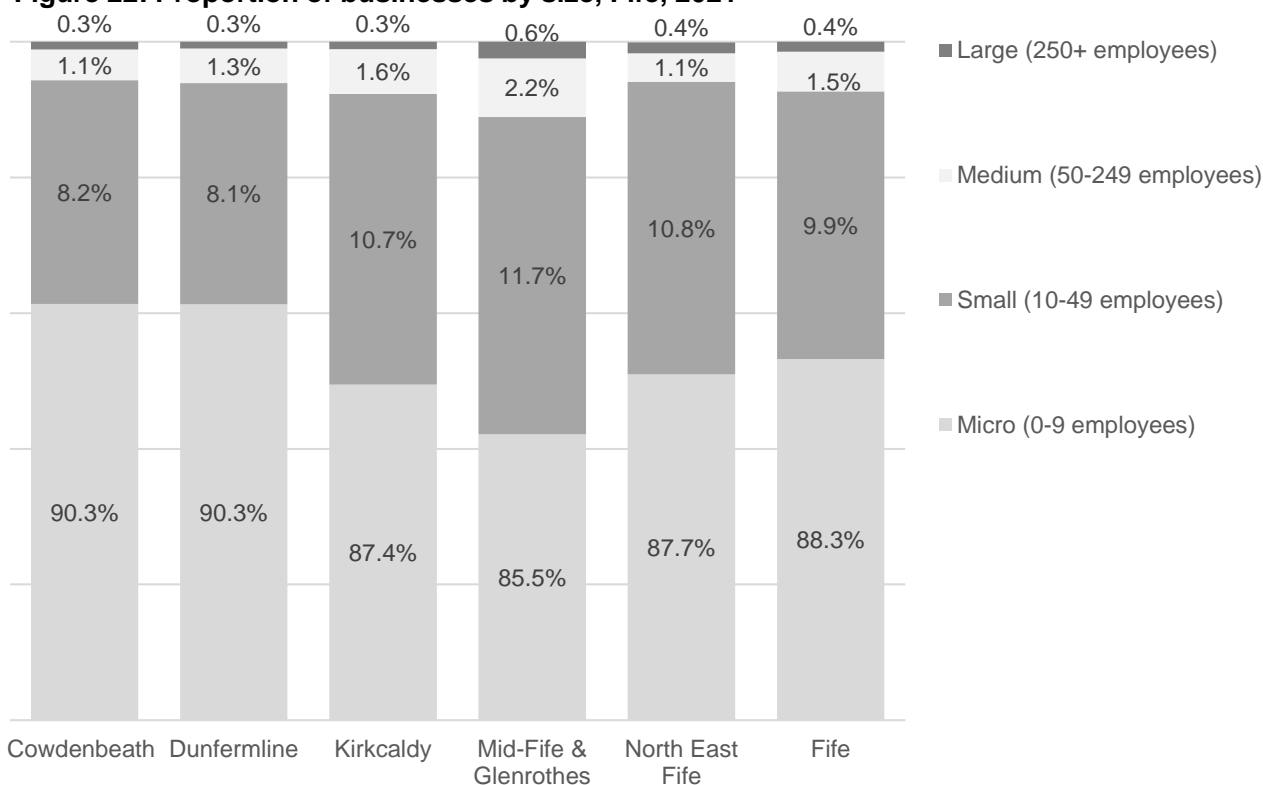
Source: ONS UK Business Counts, 2021.

Note: The number of enterprises registered for VAT and/or PAYE that were live on 12 March 2021. Does not therefore include unregistered enterprises (sole traders and partnerships) who are not VAT and/or PAYE registered. As all numbers are round to the nearest zero or 5, all zeros are not necessarily true zeros and numbers below 10 should be viewed with caution.

Figure 21: Change in the number of enterprises by Scottish Parliamentary Constituency Area (SPCA) and Size 2020-2021

	Cowdenbeath SPCA		Dunfermline SPCA		Kirkcaldy SPCA		Mid Fife & Glenrothes SPCA		North East Fife SPCA		Fife	
	2021	Change 2020-21	2021	Change 2020-21	2021	Change 2020-21	2021	Change 2020-21	2021	Change 2020-21	2021	Change 2020-21
Micro (0 to 9 employees)	1,590	-170	1,775	-50	1,590	-70	1,390	-10	2,075	-45	8,420	-350
Small (10 to 49 employees)	145	+5	160	0	195	-15	190	+5	255	+5	940	-10
Medium (50 to 249 employees)	20	-5	25	-5	30	0	35	0	25	-5	140	-10
Large (250+ employees)	5	0	5	0	5	0	10	0	10	0	35	0

Figure 22: Proportion of businesses by size, Fife, 2021



Businesses by Size:

The Mid-Fife and Glenrothes Scottish Parliamentary Constituency Area has the highest proportions of small, medium, and large businesses followed by Kirkcaldy and North East Fife (Figure 22).

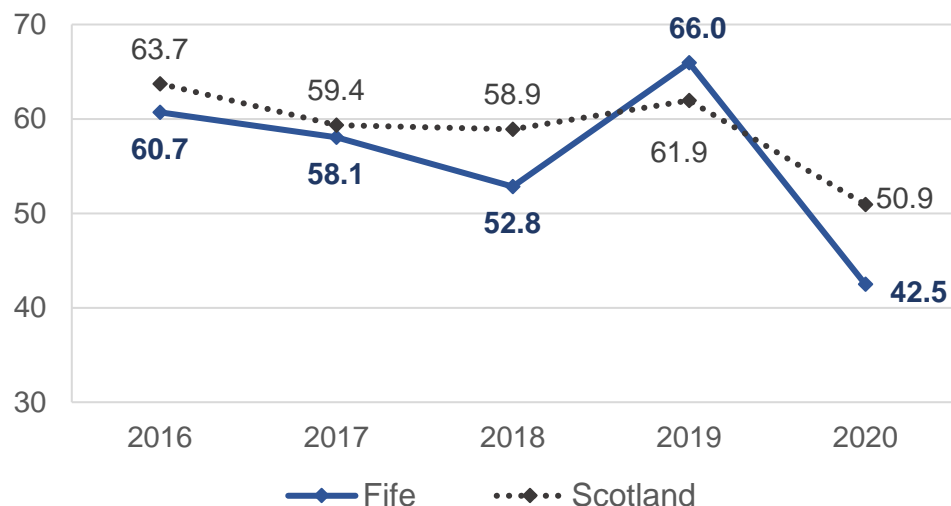
The Cowdenbeath and Dunfermline SPCAs have the highest proportions of micro businesses (90.3%) and smallest proportions of small and medium-sized businesses.

Source: UK Business Counts, 2021.

Note: The number of VAT and/or PAYE registered enterprises that were live on 12 March 2021. Does not therefore include unregistered enterprises (sole traders and partnerships) who are not VAT and/or PAYE registered.

Business Births

Figure 23: Business start-ups per 10,000 working age adults (16-64) 2016-2020



In 2020, both the number of new business start-ups and the business start-up rate in Fife fell.

A total of 985 new businesses started up in 2020, 545 or 35.6% fewer than in 2019 when 1,530 business start-ups were recorded – the highest number recorded in the time-series of these data (which goes back to 2009).

In Scotland as a whole, the number of business births fell by 17.9%.

Fife's start-up rate in 2020 was lower than the rate for Scotland as a whole (Figure 23).

Source: ONS Business Demography, UK (2020). Note: These figures do not include unregistered enterprises (sole traders and partnerships who are not VAT and/or PAYE registered).

Business Survival Rates

Figure 24: Survival of New Start Businesses Born in 2017

	Percentage of businesses surviving 1 year (to 2018)	Percentage of businesses surviving 2 years (to 2019)	Percentage of businesses surviving 3 years (to 2020)
Fife	91.5%	75.2%	57.4%
Scotland	89.8%	71.5%	55.9%

For each of the first three years after starting up in 2017, Fife's business survival rates were above the Scottish average.

Between 2019 and 2020, the 3-year survival rate of businesses in Fife fell from 59.2% to 57.4%.

Source: ONS Business Demography, UK (2020). Note: These figures do not include unregistered enterprises (sole traders and partnerships who are not VAT and/or PAYE registered).

Distribution of Employment

Figure 25: Number of Jobs in Fife; 2019 and 2020

	Cowdenbeath Area	City of Dunfermline	Glenrothes Area	Kirkcaldy Area	Levenmouth	North East Fife	South & West Fife	Fife
September 2019	8,000	29,000	25,000	22,000	10,000	23,000	17,000	138,000
September 2020	8,000	27,000	25,000	23,000	9,000	22,000	16,000	133,000
% change 2019-2020	0.0%	-6.9%	0.0%	+4.5%	-10.0%	-4.5%	-5.9%	-3.6%

Change in Number of Jobs 2019 and 2020:

Fife was one of 23 Scottish Local Authorities which saw an overall fall in jobs (down 5,000 or -3.6%) between September 2019 and September 2020. Scotland as a whole saw a 2.2% decrease.

Within Fife, Dunfermline saw the largest decrease in the number of jobs (down by 2,000 or -6.9%) whilst Levenmouth saw the largest proportionate decrease (down by 1,000 or -10.0%). Decreases were also seen in North East Fife (-1,000 or -4.5%) and South & West Fife (-1,000 or -5.9%), while the Kirkcaldy Area saw a 4.5% increase in jobs and the number of jobs remained unchanged in the Cowdenbeath and Glenrothes Areas (Figure 25).

Employment by Sector:

North East Fife has the highest proportion of jobs in Education and Accommodation & Food Services (34.6% and 33.3% of Fife's jobs respectively) (Fig.26).

63.6% of all employment in Public Administration & Defence Activities in Fife is located in the Glenrothes Area.

Three quarters of Fife's jobs in Agriculture, Forestry & Fishing* are located in Levenmouth.

Three quarters of all employment in Financial & Insurance activities in Fife is located in Dunfermline, along with half of Fife's jobs in the Information & Communication sector.

Nearly a third (31.6%) of people in Fife working in the Human Health & Social Work Activities sector are employed in the Kirkcaldy Area.

Source: ONS Business Register & Employment Survey.

Note: * excludes farm agriculture. Employment estimates include employees plus the number of working owners who receive a share of the profits but are not paid via PAYE. They do not however include those who are self-employed operating below the VAT threshold with no employees. The level of rounding applied varies by estimate, so zeros may not be true zeros and the data may not add up to the totals shown.

Figure 26: Employment by Sector, Fife 2020

Sector	Cowdenbeath Area	Dunfermline	Glenrothes Area	Kirkcaldy Area	Levenmouth	North East Fife	South & West Fife	Fife
A: Agriculture, forestry & fishing*	10	10	30	20	600	75	45	790
B: Mining and quarrying	0	0	50	20	0	75	30	200
C: Manufacturing	1,000	1,500	4,000	1,250	1,750	1,000	3,000	14,000
D: Electricity, gas, steam & air conditioning	30	10	125	0	0	40	150	400
E: Water supply; sewerage, waste mgmt	25	400	150	75	15	75	200	900
F: Construction	500	1,000	700	1,500	350	1,000	1,250	7,000
G: Wholesale & Retail Trade; Vehicle Repair	1,250	4,500	3,000	4,500	1,250	4,000	2,000	21,000
H: Transportation & Storage	600	2,000	600	1,250	800	500	900	7,000
I: Accommodation & Food Services	350	1,500	1,000	1,250	450	3,000	800	9,000
J: Information & Communication	75	2,250	200	600	35	225	900	4,500
K: Financial & Insurance Services	25	2,250	125	175	40	75	350	3,000
L: Real estate activities	100	250	350	175	75	300	100	1,250
M: Professional, scientific & technical	250	2,000	700	1,250	350	900	1,500	7,000
N: Administrative & support services	250	1,500	700	1,000	400	1,000	900	6,000
O: Public Admin, Defence; Social Security	600	900	7,000	1,000	175	500	800	11,000
P: Education	1,000	2,250	1,500	1,750	900	4,500	1,000	13,000
Q: Human health & social work activities	1,250	4,000	3,000	6,000	1,750	2,500	1,000	19,000
R: Arts, entertainment & recreation	250	450	350	450	175	900	250	3,000
S: Other service activities	175	600	700	400	200	700	350	3,000
Total Employment*	8,000	27,000	25,000	23,000	9,000	22,000	16,000	130,000

Support to Businesses

Figure 27: Financial Support Given to Businesses in Fife, 2021/22

	Cowdenbeath Area	Dunfermline	Glenrothes Area	Kirkcaldy Area	Levenmouth	North East Fife	South & West Fife	Fife
Number of businesses supported	9	19	13	20	7	15	8	91
Value of financial support	£9,140	£32,449	£31,747	£34,505	£4,276	£36,963	£4,806	£153,886*
Jobs created as a result of financial support	7	19.5	16	22	2	42	4	112.5

Source: Fife Council Economic Development.

Note: * In addition to this support, Fife Council and Business Gateway Fife paid out over £34 million in grants to Fife's businesses from the Scottish Government's Coronavirus Business Support Funds.

Figure 28: Number of Business Start-Ups supported by Business Gateway Fife, 2021/22

	Cowdenbeath Area	Dunfermline	Glenrothes Area	Kirkcaldy Area	Levenmouth	North East Fife	South & West Fife	Fife
No. of businesses receiving Expert Help	10	16	19	15	5	15	17	97
No. of businesses accessing business growth services	96	170	162	178	76	274	145	1,101*
No. of Business Gateway-supported start-ups	80	102	80	125	51	93	72	603
No. of jobs created from Business Gateway support	101	122	100	159	71	133	91	777
Turnover generated	£2,180,500	£2,935,000	£2,484,500	£3,693,300	£1,440,200	£2,522,900	£2,105,000	£17,361,400

Source: Business Gateway Fife.

Note: * total excludes 83 businesses with an invalid or non-Fife postcode

Support to Businesses:

£153,886 of financial support was given to 91 Fife businesses by Fife Council in 2021/22, support which created 112.5 jobs (Figure 27). These figures include repayable grants provided through the Fife Council funded Fife Investment Fund as well as non-repayable trade development and workforce upskilling grants through the EU funded SME Competitiveness Fund (current funding for the SME Competitiveness Fund ends in March 2023).

Business Gateway Fife supported 603 new business start-ups in 2021/22, 85 more than in the previous year. This will help to create 777 jobs, 101 more than in 2020/21 (Figure 28).

Fife Council and Business Gateway Fife also approved over 3,000 applications to - and paid out over £34 million in grants from - the Scottish Government's Coronavirus Business Support Funds. This was in addition to £72 million paid out in 2020/21.

Other Activity:

The **Trade Development Programme** supported 36 businesses to attend and exhibit at 7 trade shows.

33 businesses were supported at 9 International Trade Pathway Webinars. The events were part of a programme of workshops and training designed to support Fife businesses to access new markets being delivered by Fife Council in partnership with Business Gateway Fife, Fife Chamber of Commerce and Scottish Development International.

The **Supplier Development Programme** helped 663 Fife businesses improve their tendering skills. 1,020 Fife companies are now registered with the programme which offers expert training, support and information to help businesses win public sector contracts. In November, 78 Fife businesses attended a virtual Meet the Buyer event to learn about supply chain opportunities arising from the **Dunfermline Learning Campus and Levenmouth Railway Link.**

In March 2022, **Fife and Tayside Procurement Surgeries** were launched. Hosted by Angus, Dundee, Fife and Perth & Kinross councils on a rotating basis, the surgeries are designed to inform local businesses of emerging public sector and supply chain procurement opportunities and increase their confidence and ability to tender for public sector contracts.

Vacant & Derelict Land

Figure 29: Extent of Vacant & Derelict Land 2021

Area Committee	Total Amount of Vacant & Derelict Land (ha)	Proportion of Fife's total Vacant & Derelict Land
Cowdenbeath	48.6	6.8%
Dunfermline	12.6	1.8%
Glenrothes	126.1	17.5%
Kirkcaldy	41.7	5.8%
Levenmouth	68.3	9.5%
North East Fife	68.8	9.6%
South and West Fife	352.7	49.1%
Total Fife	718.8	100.0%

Source: Fife Council Vacant & Derelict Land Audit 2021

In 2021, there were 212 vacant & derelict land (VDL) sites across Fife amounting to 718.8 hectares, 10 sites and 11.6 hectares fewer than in 2020.

Since 2015/16, Fife Council has been one of five local authorities to receive funding from the Scottish Government's Vacant & Derelict Land Fund (VDLF); in 2021/22, Fife was allocated £1.451 million from the fund. The following are a selection of current/proposed projects supported by the fund:

- Ground remediation/preparation works at the east of the Eden Campus in Guardbridge for the installation of a solar photovoltaic array.
- Making the former Flax Mill at Silverburn Country Park, Levenmouth, wind and watertight.
- Industrial estate regeneration at Hillend (Dalgety Bay), Muiredge and Mountfleurie (Levenmouth), Queensway (Glenrothes) and The Avenue (Lochgelly).
- Site remediation and preparation works for the oil and gas decommissioning facility at Energy Park Fife now being operated by Cesscon Decom Ltd.
- Mixed-use affordable housing and commercial developments in town centre sites in Cupar, Cowdenbeath and Lochgelly (in partnership with Kingdom Housing and Ore Valley Housing Associations).
- The acquisition and remediation of a former Waste Transfer Site in Kirkcaldy.
- The implementation of Climate Plan Fife and its associated Sustainable Energy Action Plan (SECAP).

Fife i3 Programme (Edinburgh & South East of Scotland City Region Deal)

Figure 30: Fife i3 Programme Investment Status

Area Committee	Sites	Status at November 2021	Tranche 2 (2022-25) Sites	Expected Completion
Cowdenbeath	The Avenue, Lochgelly	Statutory Consents obtained. Site Servicing to be completed during Q1 2022/23.	Enterprise Hub, Cowdenbeath	2024/25
Dunfermline	Fife Interchange, Dunfermline (Site Servicing)	Statutory Consents obtained. Site Servicing completed during 2021/22.	Fife Interchange, Dunfermline (new units)	2024/25
Glenrothes	Queensway Industrial Estate, Glenrothes	New build completed. Units being marketed with majority now let.	Queensway Industrial Estate (refurbishment)	2022/23
Kirkcaldy	Dunnikier Business Park, Kirkcaldy	Construction Contract let; new units completed November 2021. Marketing underway, strong demand.	John Smith Business Park (new units)	2024/25
Levenmouth	Levenmouth Business Park	Utility work being carried out.	Levenmouth Business Park (new units)	2024/25
South & West Fife	Hillend and Donibristle Industrial Estates, Dalgety Bay	Site Acquisition completed.(Site R) Statutory consents, contract let for new build units on Site W in 2021/22	Site W New Build Site B: Site Acquisition & Servicing Site R: Site Servicing	2022/23 2024/25 2024/25
North East Fife (Tay Cities Region Deal)	Eden Campus, Guardbridge, University of St Andrews	Statutory consents process underway for first buildings.	Refurbishment of roadside buildings; includes Enterprise Hub	2024/25

Note: There is a third tranche of activity for this investment programme from 2025/2028; these projects are not included as they are subject to approval for the Full Business Case in 2024/25.

Fife's ten-year £48.5 million Industrial Innovation Investment (i3) Programme funded by the Edinburgh and South East Scotland City Region Deal, is delivering new industrial, office and business space and serviced employment sites in key locations in Mid and South Fife (Figure 30).

The University of St Andrews' Eden Campus in Guardbridge is being developed as part of the Tay Cities Region Deal.

Town Centres

Figure 31: Town Centre Vacancy rates, April 2021

Area Committee	Town Centre	% of Vacant Units	% of Vacant Floor Space
Cowdenbeath Area	Cowdenbeath	21.8%	18.4%
	Lochgelly	17.7%	20.9%
Dunfermline Area	Dunfermline	20.8%	28.1%
Glenrothes Area	Glenrothes	23.4%	26.5%
Kirkcaldy Area	Kirkcaldy	28.8%	35.3%
	Burntisland	10.2%	12.0%
Levenmouth	Leven	20.1%	22.6%
North East Fife	Anstruther	14.3%	18.1%
	Cupar	13.9%	15.8%
	St Andrews	11.3%	11.7%
South & West Fife Area	Inverkeithing	9.4%	12.0%
	Kincardine	16.7%	36.4%

St Andrews and Inverkeithing have the lowest vacancy rates of Fife's main town centres (Figure 31).

The highest vacancy rates are found in Kirkcaldy and Kincardine (the latter in terms of the proportion of vacant floorspace).

Whilst Dunfermline, Glenrothes, Kirkcaldy, Leven, Anstruther, St Andrews and Inverkeithing saw the proportion of vacant units rise between 2019 and 2021 (Figure 32), Cowdenbeath, Lochgelly, Burntisland, Cupar and Kincardine all saw vacancy rates fall.

Source: Experian GOAD Data (Fife Council).

Figure 32: Percentage of vacant town centre units 2019-2021

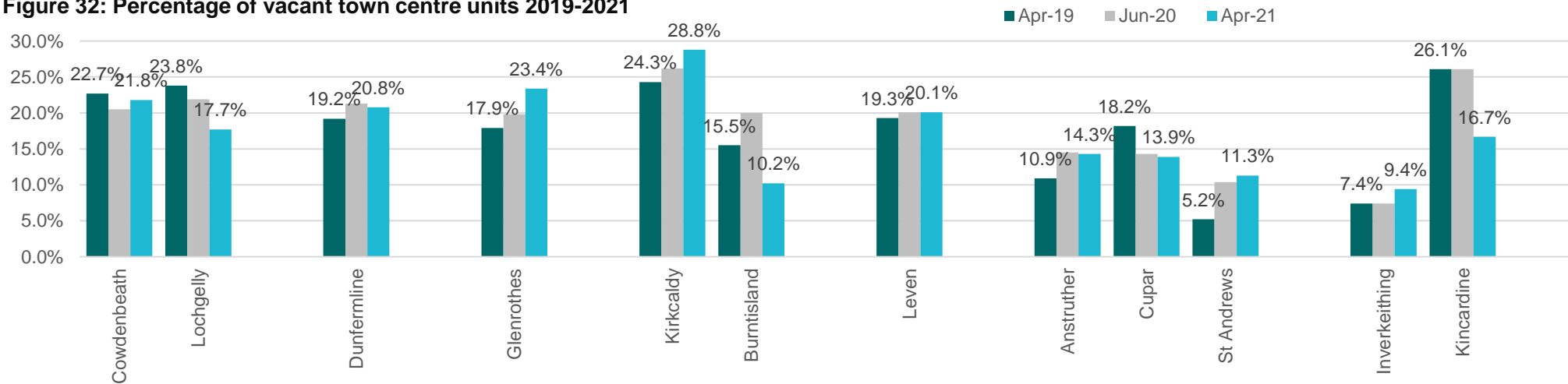


Figure 33: Grants awarded to businesses through the Town Centre Business Improvement Grant Scheme 2020/21 and 2021/22

Grant Funding Allocation	Cowdenbeath Area	Dunfermline Area	Glenrothes Area	Kirkcaldy Area	Levenmouth Area	North East Fife	South & West Fife	Fife
Number of grant awards committed by 31 March 2021	9	5	1	10	1	7	0	33
Total value of grant funding awarded by 30 Sept 2021	£59,713	£24,191	£7,312	£72,979	£6,699	£29,665	0	£200,560

Source: Fife Council Business & Employability Service.

Note: In line with Scottish Government Town Centre Capital Funding requirements, Fife Council Town Centre Business Improvement Grant funding required awards to be legally committed by 31 March 2021. The Scottish Government allocation of grant funding thereby required to be spent by 30 September 2021, with a supplementary Fife Council budget allocation providing a degree of flexibility in project expenditure through to 31 March 2022. As a result, grant funding expenditure has taken place across both the 2020/21 and 2021/22 financial years.

It should also be noted that in 2020/21, grants were only available to businesses located in Cowdenbeath, Cupar, Dunfermline, Glenrothes, Kirkcaldy, Leven, Lochgelly and St Andrews.

In 2021/22, the eligibility criteria were changed to include businesses in smaller town centres.

Town Centre Activity:

- Between 2019 and 2021, Fife received £5.895m from the Scottish Government's Town Centre Capital Fund. 14 of the 17 projects supported by the fund are now complete:
 - Fife-wide Town Centre Building Improvement Grant Scheme (£266,543 of grants were awarded to town centre businesses in 2020/21(Figure 33)).
 - The purchase and demolition of the former DSS building in Cowdenbeath town centre.
 - Creation of an Enterprise Hub in a vacant council building in Maygate Exchange, Dunfermline.
 - Renovation of Abbot House in Dunfermline.
 - Public realm improvements to Inverkeithing South Gateway.
 - Upgrades to pedestrian and cycling signage and routeways in Glenrothes.
 - Development of key sites within Glenrothes town centre.
 - Public realm, gateway, and car parking improvements in Kirkcaldy.
 - The reconstruction of The Posting steps and ramp in Kirkcaldy.
 - Support to the Kirkcaldy Waterfront project, including viewing platforms and art lighting.
 - Acquisition of vacant buildings in Kirkcaldy's Merchants Quarter.
 - Purchase and redevelopment by BRAG of the former WH Smith building in Leven.
 - Upgrades to cycle routes and pedestrian areas in Leven.
 - Creation of a town house square in Lochgelly.

Town Centre Activity (continued):

The remaining 3, which were delayed due to issues outwith programme control, are still in progress having received an extension from the Scottish Government:

- Renovation of Cowdenbeath Town House.
 - Redevelopment of Cupar Inner Court / Bonnygate.
 - Enhancement of Kirkcaldy Adam Smith Theatre auditorium.
- Fife Council supported the rollout of the new **Scotland Loves Local Fife Card**, one of 32 Gift Cards unique to each region of Scotland. The scheme is being delivered by Scotland's Town Partnership and the first year of costs are being met by the Scottish Government as part of its £10m support for Scotland Loves Local.
 - Fife Council is applying for **city status for Dunfermline and St Andrews** as part of the competition launched by the UK Government to mark the Queen's Platinum Jubilee.
 - Businesses voted to renew **BID St Andrews** for a second 5-year term (2021-2026) in July. In November the BID company carried out a TV marketing campaign advertising St Andrews as a day trip, short break and holiday destination to Scottish viewers.
 - A working group was set up by Fife Council to improve **Dunfermline town centre**. The Place Leadership Group will look at improving roads, pavements and seating to reverse the impact of the pandemic.
 - Designs for the **Dunfermline High Street Gap Site** were agreed by the City of Dunfermline Area Committee. The proposed £1.3 million project will see the development of green and performance space, a new setting for the historic Mercat Cross and a community/enterprise hub.
 - Dunfermline Butcher **Bryan Beveridge** won the High Street Hero Award at the inaugural Scotland Loves Local Awards in November.
 - 44 Burntisland traders signed up for this autumn's **Fiver Fest** organised by traders' group 'Totally Local'. The event took place between 9 and 23 October with shops in the town offering deals on goods and services for just £5. It followed a similar successful event in June.
 - Kirkcaldy's community interest company **Love Oor Lang Toun** launched a new project - The Future is Now - looking at some of the High Street's large empty units and consulting on their future use. The group has employed a development manager and communications and engagement officer with funding from the Crown Estates and Fife Council.
 - A digital loyalty rewards programme - **MiRewards Kirkcaldy or Kirkcaldy rewards** - was launched. The programme rewards shoppers with 1 digital reward point for every £1 they spend in participating businesses across the town centre and works alongside the Kirkcaldy Gift Card.
 - **Fife Department Store** opened in the former Debenham's shop in Kirkcaldy High Street following the sudden closure of the 15-17 concession store.
 - Phase one of the development of **Kirkcaldy Waterfront** was completed with the installation of new lighting. Phase 2 is temporarily on hold, but work will now start on implementing Phase 3 aimed at making more use of the promenade and improving its links to the town centre.

Tourism

Figure 34: Volume and Value of Tourism, Jan-Dec 2020

	St Andrews	Dunfermline Area	Kirkcaldy and Mid Fife	NE Fife (exc. St Andrews)	Fife
Visitor days	453,700	544,600	722,300	600,700	2.32m
% change in visitor days 2019-2020	-61.8%	-65.6%	-59.0%	-54.8%	-60.4%
Economic impact (direct, indirect & induced)	£41.17m	£31.32m	£34.27m	£34.08m	£140.84m
% change in economic impact 2019-2020	-61.6%	-65.1%	-60.9%	-53.1%	-60.6%
Number of jobs supported (FTEs)	710	635	661	807	2,812
% change in number of jobs supported 2019-2020	-47.8%	-54.8%	-50.4%	-42.0%	-48.7%

Source: STEAM Tourism Economic Impacts Fife 2020, Global Tourism Solutions (UK) Ltd.

Note: The areas relate to Fife's Local Tourist Associations (LTAs) as follows: St Andrews=St Andrews LTA; NE Fife=Cupar & North Fife & East Neuk LTAs; Kirkcaldy & Mid Fife=Levenmouth and Heartlands of Fife LTAs; Dunfermline Area=Dunfermline & West Fife LTA. Figures are not available at a lower level than these four areas.

Figure 35: Volume and Value of Tourism, Jan-Jun 2021

	St Andrews	Dunfermline Area	Kirkcaldy and Mid Fife	NE Fife (exc. St Andrews)	Fife
Visitor numbers	219,770	269,480	346,100	270,030	1.105m
% change in visitor numbers 2020-2021	+34.3%	+39.1%	+2.8%	+23.6%	+21.1%
Economic impact (direct, indirect & induced)	£17.43m	£14.17m	£16.28m	£15.02m	£62.91m
% change in economic impact 2020-2021	+20.7%	+55.1%	+40.5%	+27.9%	+34.1%
Number of jobs supported (FTEs)	650	584	623	752	2,610
% change in number of jobs supported 2020-2021	+19.3%	+38.0%	+28.1%	+20.1%	+25.4%

Source: Interim Draft STEAM Report for Fife January-June 2021- Global Tourism Solutions (UK) Ltd.

Note: The areas relate to Fife's Local Tourist Associations (LTAs) as follows: St Andrews=St Andrews LTA; NE Fife=Cupar & North Fife & East Neuk LTAs; Kirkcaldy & Mid Fife=Levenmouth and Heartlands of Fife LTAs; Dunfermline Area=Dunfermline & West Fife LTA. Figures are not available at a lower level than these four areas.

Volume and Value of Tourism:

- By 2019, the annual value of tourism activity had grown steadily since 2009 to £366.68m. In 2020 tourism activity in Fife was substantially affected by the travel restrictions imposed as a result of the Covid-19 pandemic. It is estimated that the number of visitor days spent in the region fell by 60.4% (from 5.86m in 2019 to 2.32m in 2020) and the economic impact by -60.6% to £140.84m. The Dunfermline Area and St Andrews saw the largest proportionate decreases in visitor days and economic impact (Figure 34).
- The expenditure and activity of visitors to Fife supported a total of 2,812 Full-Time Equivalent (FTE) jobs in 2020, 48.7% fewer than in 2019 (5,487). These figures do not include FTEs supported by the furlough scheme which was an important support mechanism for the visitor economy during the pandemic. Survey data for UK visitor destinations suggest relatively low incidences of redundancy during 2020 due to the furlough scheme.
- Between January and June 2021, as a result of restrictions easing, Fife saw the number of visitor days spent in the region increase by 21.1%, while the economic impact and number of jobs supported rose by 34.1% and 25.4% respectively (Figure 35)
- The largest increases in visitor days were amongst people staying in non-serviced accommodation (+70.6%). The number of visitor days spent staying with friends and relatives fell by 6.3%.
- The Dunfermline Area saw the greatest rate of recovery in the first 6 months of 2021. Kirkcaldy saw the second highest increase in economic impact and jobs supported; it only saw a small increase in the number of its visitor days, due to a 30% drop in the number of people staying with friends and relatives.

Fife Tourism Activity:

- Fife Council continued its delivery and review of the **COVID-19 Tourism & Events Strategy Action Plan**, which was agreed by the Fife Tourism Partnership Executive Board and Local Tourist Association Chairs in January 2021. The post-Covid reliance on the domestic tourism market and day trips has meant that messaging was targeted at the Scottish/low drivetime market. As restrictions eased, traditional 'honey-pot' destinations became busy, so market messaging was focused on encouraging people to visit to quieter, lesser-known locations.
- New digital content was created, including a **series of 8 podcasts and 4 'Welcome to our Home' videos** showcasing the region, businesses and promoting key themes. To date, there have been 3,944 downloads of the podcasts and over 94,000 views of the films on Facebook alone. Marketing activity commissioned from VisitScotland included social media campaigns targeting UK audience, as well as online editorial features in Woman & Home, BBC History and Countryfile.
- The **Festival of Golf** was delivered by Visit Fife Golf from April to October 2021, with support from the Council.
- Fife Council and the Fife Coast and Countryside Trust secured £375,000 from the Rural Tourism Infrastructure Fund towards the **Fife Outdoor Tourism Infrastructure Programme**. The £1m project comprises a rolling programme of works, designed in consultation with communities, to provide a network of parking, toilets, interpretation and renewable energy points for EV and EB charging for campervans and motorhomes along the Fife Coastal Path and Fife Pilgrim Way.

Fife Tourism Activity (continued):

- The East Neuk Local Tourist Association developed the **East Neuk Now app**, with support from Fife Council.
- Two Fife projects were awarded VisitScotland Destination & Sector Marketing funding - **Food in Fife's food & drink trail along the Fife Coastal Path** and **Visit Fife Golf's campaign to promote both golf and non-golfing activity in the region**.
- 15 Fife beaches were awarded a 2021 **Keep Scotland Beautiful 'Scotland Beach Award'**.
- A Fife Events sub-group was set up, chaired by Amanda MacLeod of St Andrews Voices, to deliver the **Fife Events Group 2021-24 Action Plan**.
- Fife Council invested **£33,956 in the development of strategic events**, including the Fife Festival of Golf, Spook'Ore, the Adam Smith Festival of Ideas, StAnza International Poetry Festival, St Andrews Voices and the Anstruther Harbour Festival, which attracted the 10m high puppet STORM to the harbour as part of the Year of Coast and Waters celebrations.
- A **Tourism Skills Group** has been set up to look at how to promote tourism as a career of choice and bridge the current skills gap.
- Lindores Abbey Distillery was added to the **In the Footsteps of Kings augmented reality app**.
- Several tour operators attended a **virtual FAM trip** organised through UK Inbound in May 2021 which featured Teasses Estate near Leven.
- The Estuary Restaurant at **Leven Beach Holiday Park** opened after a £110,000 investment, creating seven full-time jobs.
- **The Crusoe Hotel** in Lower Largo reopened after extensive renovations.
- The **Old Course Hotel, Golf Resort and Spa** completed renovation works to add a penthouse, new guest rooms, an additional restaurant and bar and refurbished events spaces.
- **Silverburn Park Campsite** was named the best campsite in Scotland in the Corporate Livewire Prestige Awards.

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