

Fife Local Economic Profiles 2022-2023

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 2022/23. The profiles are based on a range of publicly available socio-economic data. Whilst many of the data have a time lag, the figures presented are the most up-to-date available at the time of writing (January 2024).

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

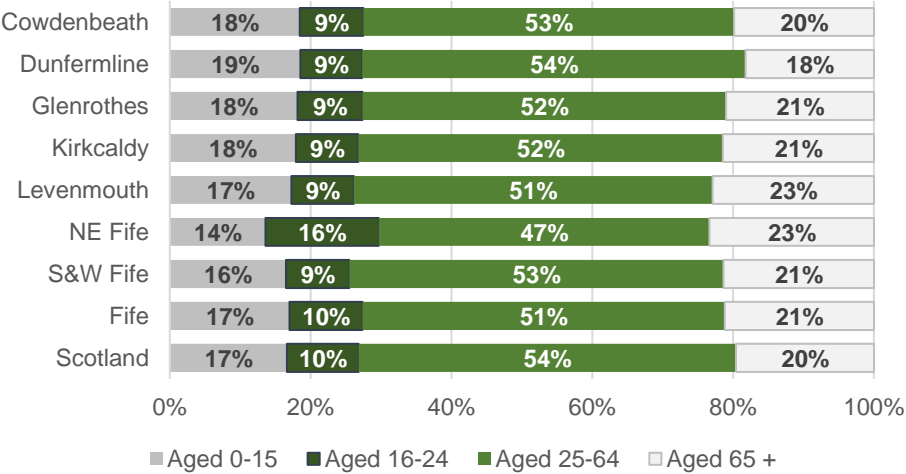
Fife’s Labour Market

Population

Figure 1: Mid-2021 Population Estimates - Fife & Local Area Committee Geographies

Cowdenbeath Area	City of Dunfermline	Glenrothes Area	Kirkcaldy Area	Levenmouth	North East Fife	South & West Fife	Fife
41,768	60,597	49,805	60,462	37,902	74,690	49,506	374,730

Figure 2: Population Structure - Local Committee Areas, Fife, Scotland Mid-2021



Around 374,730 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):

- Fife has a smaller proportion of its population of working age (aged 16-64 years) than Scotland as a whole – 61.8% of its population are of working age compared with 64% of Scotland’s population.
- Levenmouth has the smallest proportion of people of working age (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 proportions of people who are of working age (63%) and the lowest proportion of children (14%).
- North East Fife also has the largest proportion of people aged 16-24 years (16%) and the lowest proportion aged 25-64 years (47%).

Source: Mid-2021 Electoral Ward Population Estimates, National Records of Scotland. Note: Mid-Year Population Estimates for 2022 are due for release in early 2024.

Employment

Figure 3: Employment Rates, 2022/23

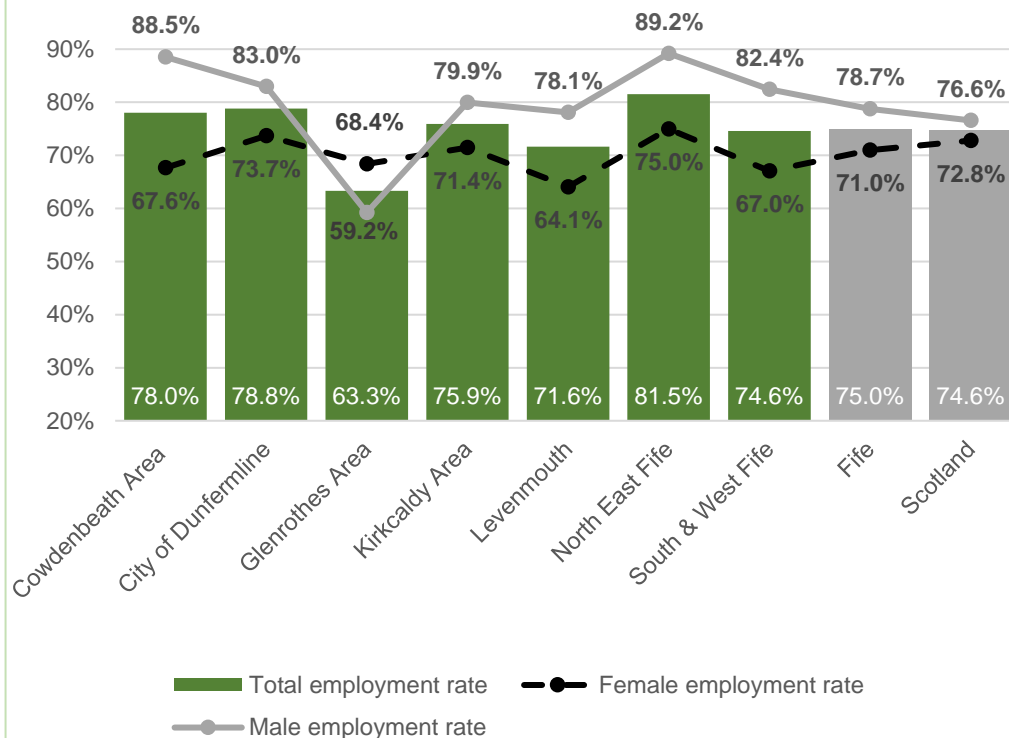
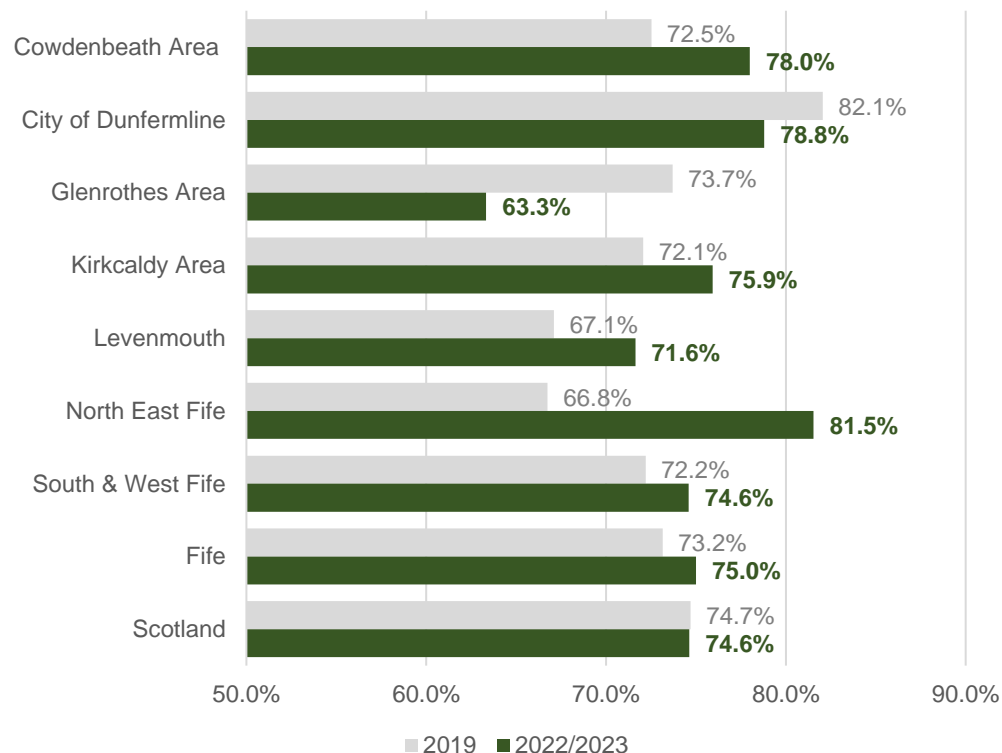


Figure 4: Employment Rate Change 2019-2022/23



Latest Employment Rates*:

North East Fife's employment rate (81.5%) in 2022/23 was the highest in Fife (Figure 3).

The employment rates in the Glenrothes Area and Levenmouth were considerably lower than the Fife and Scottish rates.

The Glenrothes Area's employment rate was the lowest of all the committee areas in Fife (63.3%). This was also the only part of Fife where the female employment rate was higher than the male employment rate (Figure 3).

Source: ONS Annual Population Survey, 2019 and 2022/23 Average Rates.

Note: *employment rate = the percentage of the working age populations (aged 16-64) who are in employment. As these employment estimates are obtained from a national survey, they are based on a sample rather than the entire population which means they are subject to uncertainty. In addition, rates for committee areas should be viewed with caution due to small sample sizes at this geographic level. Because of this, averages of the rates for 2019 and 2022/23 are given.

Employment Rate Change:

In most parts of Fife, employment rates in 2022/23 were above the pre-pandemic 2019 levels (Figure 4).

Dunfermline and the Glenrothes Area were the only areas where average employment rates in 2022/23 were lower than in 2019.

North East Fife and the Cowdenbeath Areas saw the greatest increases in employment rates.

Source: ONS Annual Population Survey, 2019 and 2022/23 Average Rates.

Note: As these employment estimates are obtained from a national survey, they are based on a sample rather than the entire population which means they are subject to uncertainty. In addition, rates for committee areas should be viewed with caution due to small sample sizes at this geographic level. Because of this, averages of the rates for 2019 and 2022/23 are given.

Unemployment

Figure 5: Unemployment in Fife, Scotland and Great Britain

	2019/20	2020/21	2021/22	2022/23
Fife (number of people)	7,100	8,700	6,600	6,100
Fife (%)	4.1%	5.1%	3.9%	3.4%
Scotland (%)	3.4%	4.7%	3.4%	3.2%
Great Britain (%)	3.9%	5.0%	3.8%	3.8%

The latest unemployment figures for Fife are for the 12 months to June 2023.

Between 2019/20 and 2020/21 Fife's unemployment rate increased from 4.1% to 5.1% as an estimated additional 1,600 people became unemployed during the Covid-19 pandemic.

Fife's unemployment rate fell in the following two years and the latest rate is at a record low (3.4%) with an estimated 1,000 fewer people unemployed than prior to the pandemic in 2019/20.

Although Fife's latest unemployment rate is higher than the Scottish rate (3.2%), the gap is narrower than before the pandemic.

Source: ONS Annual Population Survey, model-based estimates of unemployment, 12 months to June 2020, 2021, 2022 and 2023.

Note: Numbers and percentages are for those aged 16 and over who are without a job but who are looking for and available to start work. The unemployment rate is the proportion of the economically active population who are unemployed. Unemployment figures are not shown below the Fife level as sample sizes are too small for reliable estimates.

Economic Inactivity

Figure 6: Percentage of the working-age population who are economically inactive - Fife & Scotland

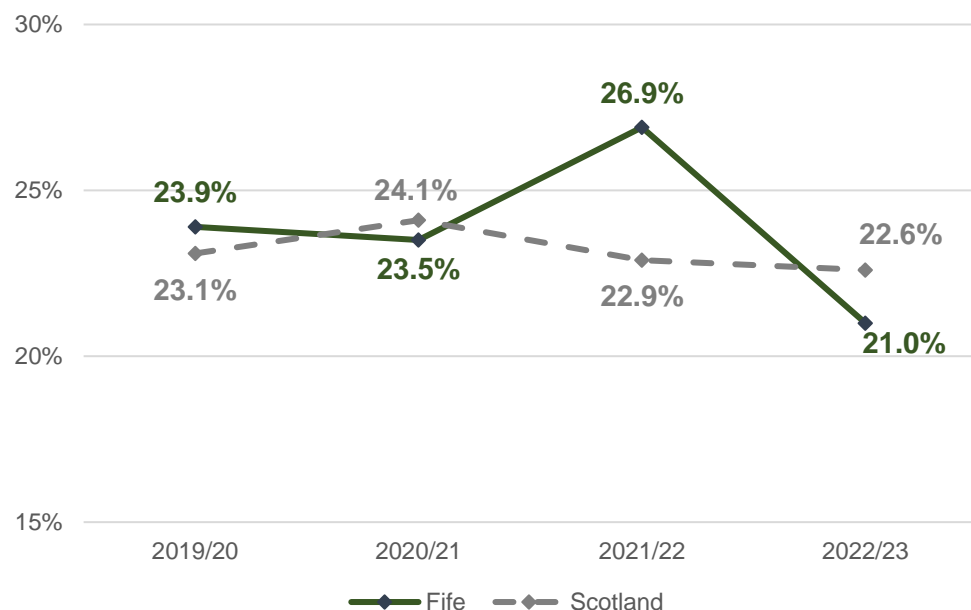


Figure 7: Number of people in Fife economically inactive due to long-term ill-health



Economic Inactivity in Fife:

A fifth (21.0%) of Fife's working aged population (people aged 16-64) was economically inactive in the 12 months to June 2023 - that is they were neither in employment nor actively seeking a job. This represents an estimated 47,000 people.

Fife's inactivity rate was lower than the Scottish rate (22.6%) for the same period, and also lower than the record high rate recorded in Fife the year before (26.9%), the highest rate recorded in the times-series of this data (which goes back to 1999). It was also lower than prior to the Covid-19 pandemic in 2019/20 (23.9%) (Figure 6).

Long term ill-health is the reason 32% of those who are economically inactive in Fife (an estimated 15,100 people) gave for not being in employment or seeking a job. Other reasons included being a student (24.7%), looking after the family/home (19.8%) and being retired (10.8%).

Source: ONS Annual Populations Survey, July – June 2019/20, 2020/21, 2021/22 and 2022/23.

Note: Those who are economically inactive are people aged 16 and over without a job who have not sought work in the last four weeks and/or who are not available to start work in the next two weeks, ie they are neither employed nor unemployed.

Figure 8: Proportion of the working age population who were economically inactive (economic inactivity rate) 2022/23

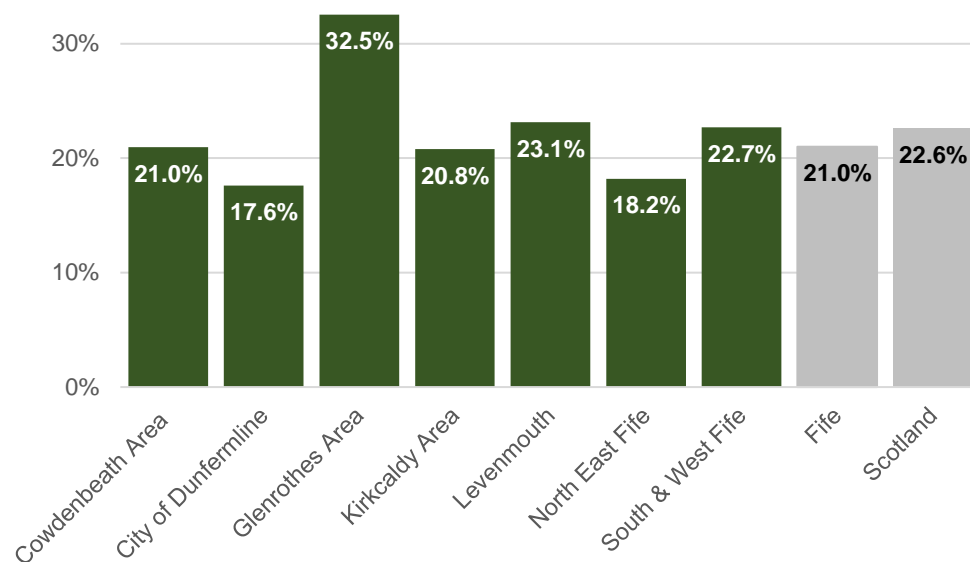
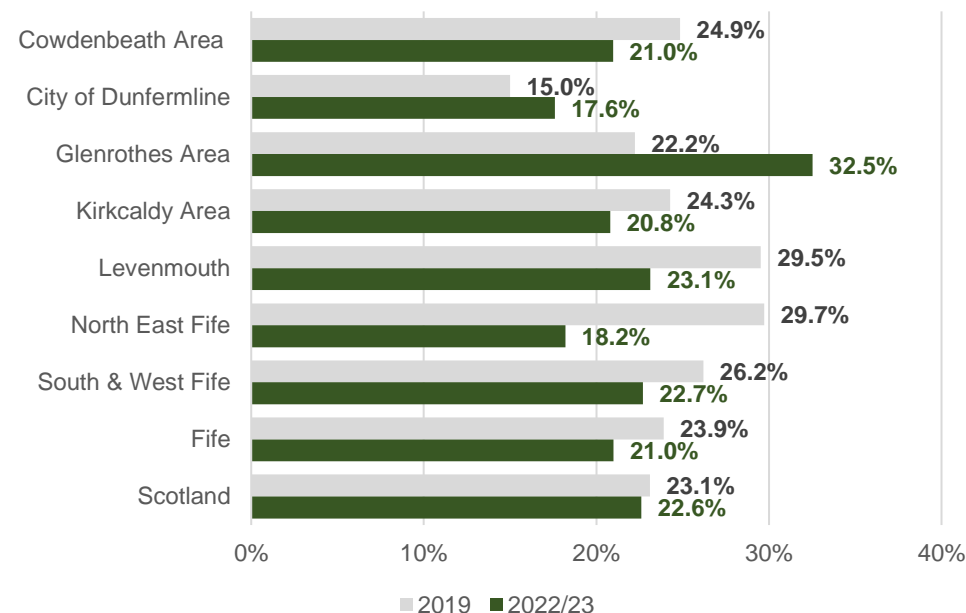


Figure 9: Change in economic activity rates 2019 - 2022/23



Between 2019 and 2022/23, the Glenrothes Area and Dunfermline saw increases in the proportion of their populations who were economically inactive. In all other parts of Fife inactivity rates fell (Figure 9).

Dunfermline, the Kirkcaldy Area and North East Fife are the only areas whose latest economic inactivity rate is lower than both the Fife and Scottish rates (Figure 8). Dunfermline has the lowest rate of inactivity in Fife.

The Glenrothes Area has the highest economic inactivity rate (32.5%) followed by Levenmouth and South & West Fife.

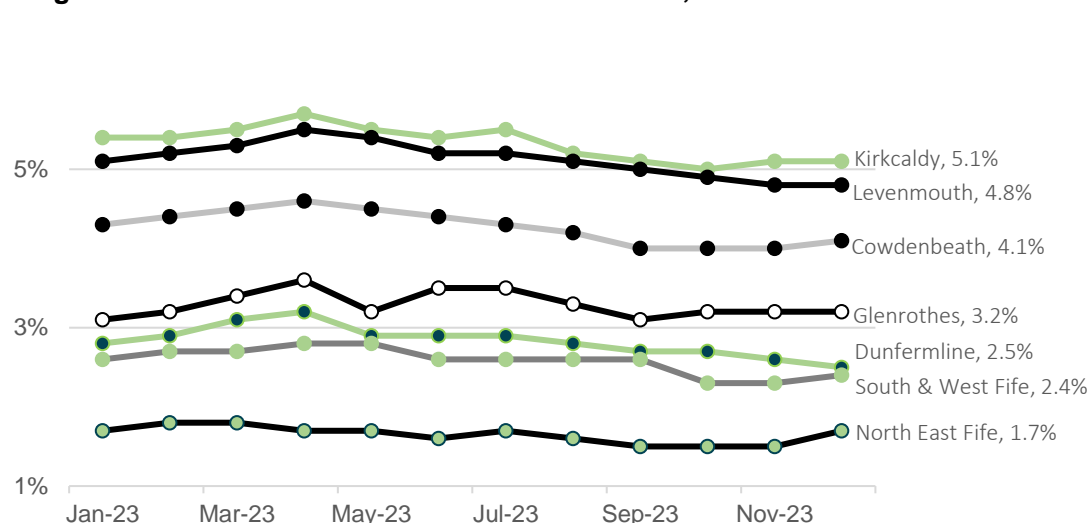
Due to small sample sizes at committee area levels, all these figures should be viewed with caution.

Source: ONS Annual Populations Survey, Jan-Dec 2019 and 2022/23

Note: Those who are economically inactive are people aged 16 and over without a job who have not sought work in the last four weeks and/or who are not available to start work in the next two weeks, ie they are neither employed nor unemployed. Economic inactivity rates for committee areas should be viewed with caution due to small sample sizes at this geographic level. Because of this, for the committee areas, averages of the rates for 2019 and 2022/23 are given; the rates for Fife and Scotland are for the 12 months to June 2023.

People Claiming Out-of-work Benefits

Figure 10: Claimant rates – Fife Area Committees, Jan- Dec 23



North East Fife has the lowest rate of people claiming out-of-work benefits of all the area committees (Figure 10).

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

All claimant rates in Fife increased significantly in 2020 following the onset of the Covid-19 pandemic and remained considerably higher than pre-pandemic levels until they started to fall in April 2021. Over the past 12 months, rates have remained fairly stable, increasing a little in mid-2023 before falling again.

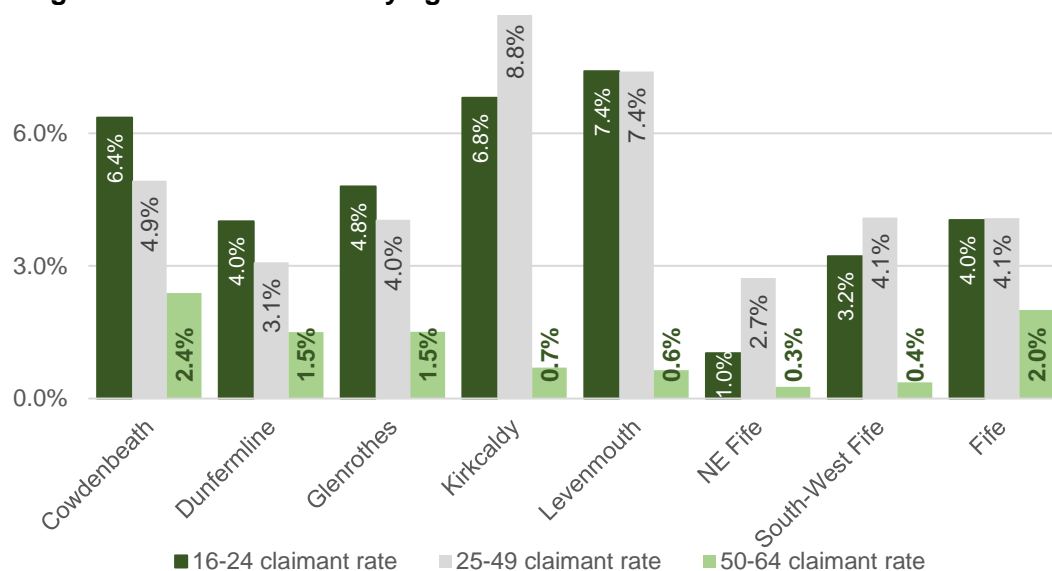
In all parts of Fife, apart from in North East Fife, the average number of claimants and claimant rates for 2023 (Jan to Dec) were lower than in 2019 (Figure 11); in Scotland the number of claimants rose.

Source: ONS Claimant Count, Jan-Dec 2023. Note: The claimant rate is the percentage of working age (16-64yrs) residents claiming out-of-work benefits.

Figure 11: Claimant count and rate change 2019 to 2023

Committee Area	2019 Average		2023 Average		Difference	
	Claimant Rate	Claimant Count	Claimant Rate	Claimant Count	Claimant Rate	Claimant Count
Cowdenbeath	5.1%	1,328	4.3%	1,108	-0.9%	-220
Dunfermline	3.3%	1,213	2.8%	1,045	-0.5%	-168
Glenrothes	3.6%	1,108	3.3%	1,002	-0.3%	-107
Kirkcaldy	5.5%	2,002	5.3%	1,949	-0.1%	-53
Levenmouth	6.4%	1,450	5.1%	1,159	-1.3%	-292
North East Fife	1.7%	762	1.7%	761	0.0%	-1
South & West Fife	2.7%	836	2.6%	801	-0.1%	-35
All Fife	3.8%	8,753	3.4%	7,878	-0.4%	-876
Scotland	3.1%	108,093	3.1%	109,523	0.0%	+1,431

Figure 12: Claimant rates by age – 2023



In Dunfermline and the Cowdenbeath and Glenrothes Areas, 16-24 year olds have the highest rate of people claiming out-of-work benefits of the three main age groups.

North East Fife has the lowest claimant rates for all age groups and has particularly low rates in its 16-24 and 50-64 age groups.

The Cowdenbeath Area has the highest claimant rate for people aged over 50.

In the Kirkcaldy Area, the 25-49 age group's claimant rate is considerably higher than the other age groups in the area and is the highest rate of all age groups in Fife.

Source: ONS Claimant Count, Jan-Dec 2023 average rates

Qualifications of Working Age Population

Figure 13: Qualifications - Fife & Scotland 2022

	Fife	Scotland
% of working age population with RQF 4+ (HNC, Advanced Higher)	54.0%	54.2%
% of working age population with no formal qualifications (RQF)	7.7%	8.0%

Just over half of Fife's working age population has a qualification equal to or higher than an HNC or Advanced Higher.

Fife has a smaller proportion of its working age population with no formal qualifications (7.7%) than Scotland as a whole (8.0%).

The ONS has changed the way it collects qualifications data, so comparisons cannot be made with previous years. Reliable figures are also not available for separate age groups or below the Fife geographic area due to small sample sizes.

Source: ONS Annual Population Survey, Jan-Dec 2022

Note: Regulated Qualifications Framework (RQF) level 4 = SCQF Level 6 (HNC, Advanced Higher or equivalent). No qualifications = no formal qualifications held.

School Leaver Destinations and Attainment

Figure 14: School Leaver Destinations and Attainment 2021/22

	Fife	Scotland
Percentage of school leavers achieving a positive initial destination*	94.8%	95.7%
Percentage of school leavers achieving a positive follow-up destination*	92.1%	93.5%
Percentage of school leavers achieving 1+ SCQF Level 5 or better	81.4%	86.4%
Percentage of school leavers achieving 1+ SCQF Level 6 (Higher) or better	54.6%	61.3%

94.8% of Fife's 2021/22 school leavers achieved a positive initial destination*.

This was higher than the year before, when 93.9% of leavers achieved a positive initial destination, slightly higher than prior to the pandemic when 94.4% of 2018/19 school leavers gained a positive initial destination and the highest proportion in the time-series of this dataset (which goes back to 2009/10)

The proportion of leavers in a positive destination in April 2023, 9 months after the end of the school year increased to 92.1% and was also the highest proportion in the time-series of this dataset.

The gaps between the Fife and Scottish initial and follow-up rates both narrowed after widening in the previous two years.

The percentages of 2021/22 school leavers achieving at least one Higher was lower than the previous year and Fife's attainment figures remain lower than those for Scotland as a whole.

Source: Scottish Government, Summary Statistics for Attainment and Initial Leaver Destinations and Summary Statistics for Follow-up Leaver Destinations, No 5: 2023 Editions.

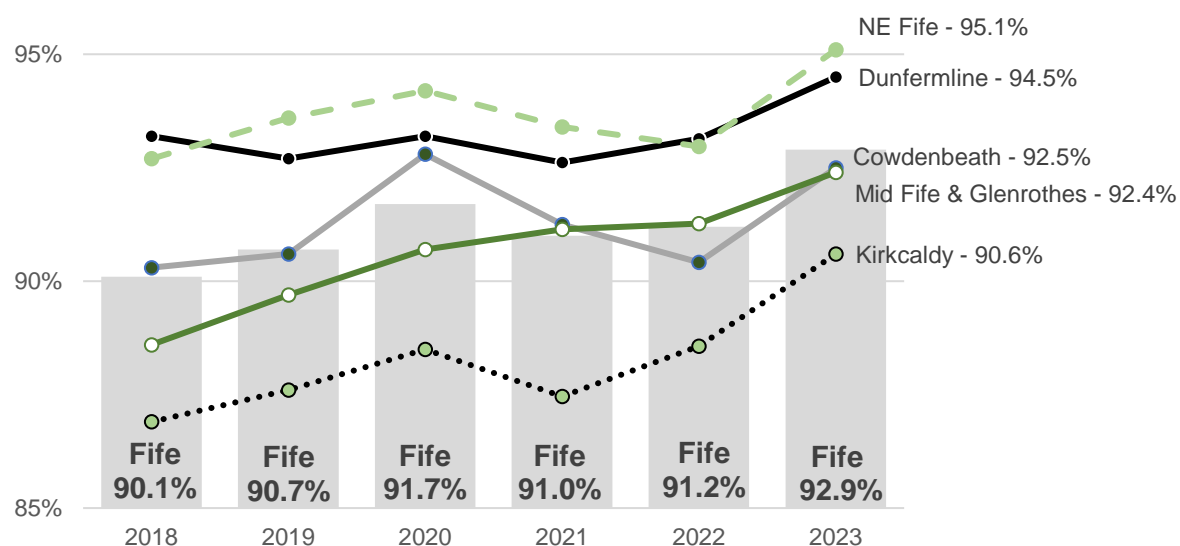
Note: * A young person is deemed to be in a positive destination when they are actively engaged with an organisation for the purpose of learning, training or work (work includes volunteering).

Annual Participation Measure for 16-19 Year Olds

Figure 15: Percentage of 16–19 year olds participating in education, training or employment 2018-2023 - 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
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%
2022	91.2%	99.0%	94.4%	88.7%	82.1%	92.4%	99.3%	95.7%	89.8%	84.2%
2023	92.9%	99.1%	95.3%	89.6%	87.2%	94.3%	99.2%	96.1%	92.6%	88.9%

Figure 16: Percentage of 16-19 year olds participating in education, training or employment 2018-2023 by Scottish Parliamentary Constituency Areas (SPCAs)



In 2023, Fife saw the proportion of its 16-19 year olds participating in education, training or employment increase to 92.9%, the highest level recorded*. (Figure 15).

Fife's largest increase in participation between 2018 and 2023 was in the 19-year-old age group (Figure 15).

Fife's participation rates are lower than the Scottish rates. In 2023, the gap narrowed for 16, 17 and 19 year-olds, but widened for 18-year olds.

All parts of Fife saw participation increase between 2022 and 2023. The participation rates in the Cowdenbeath, Mid-Fife & Glenrothes and Kirkcaldy Scottish Parliamentary Constituency Areas are below the rate for Fife as a whole (Figure 16).

Source: Skills Development Scotland, Annual Participation Measure of 16–19-year-olds in Scotland, 2023.

Note: *Data for the Annual Participation Measure goes back to 2016.

Employability Support

Figure 17: Participants* on programmes commissioned by the Opportunities Fife Partnership by age 2022/23

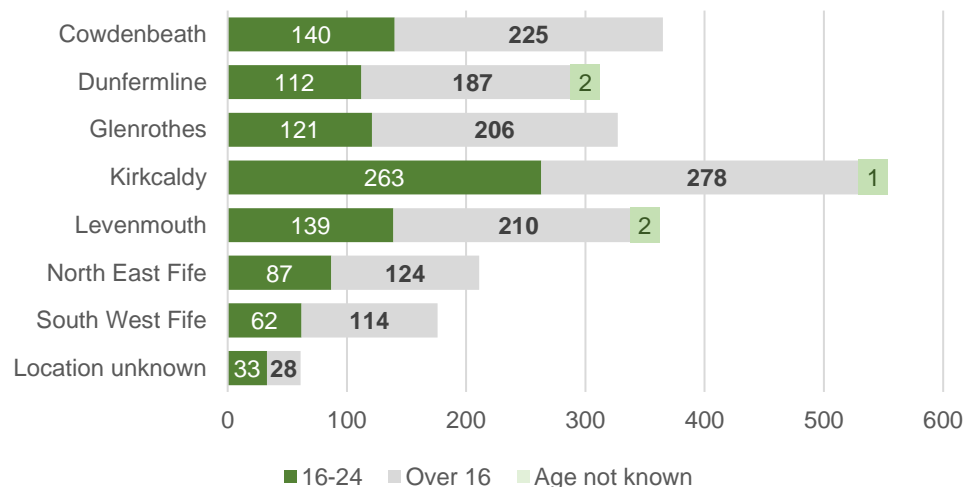
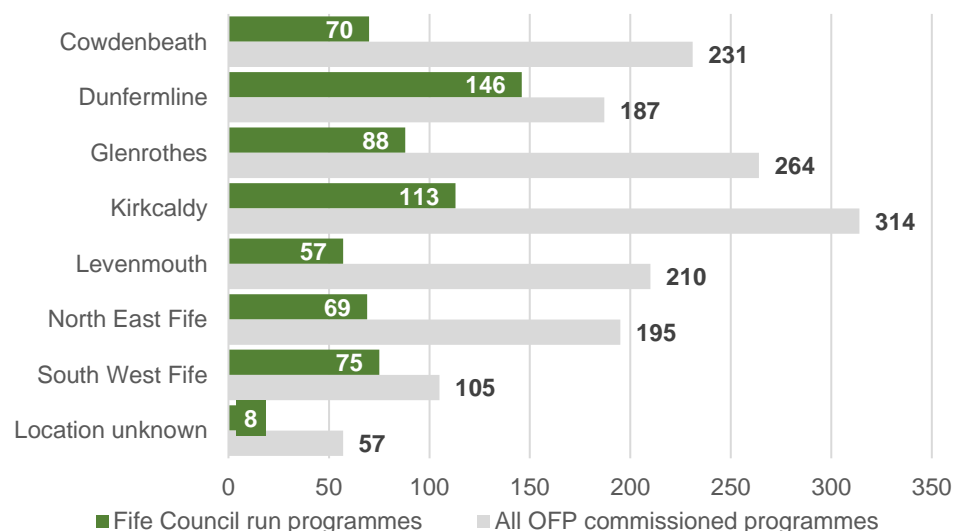


Figure 18: Participants* on employability programmes 2023/24



In 2022/23, there were **2,334 participants* (1,429 people)** on **employability programmes commissioned by the Opportunities Fife Partnership** (Figure 17). This was fewer than in the previous year as 2022/23 was a transition year, with EU-funded projects winding down and new projects starting to get off the ground.

60% of people went on to employment in 2022/23, a much higher proportion than in previous years.

The largest number of participants were resident in the Kirkcaldy Area (542) followed by the Cowdenbeath Area (365), Levenmouth (351) and Glenrothes Area (327).

41% of participants were aged between 16-24 years. The areas with the highest proportion of participants aged 16-24 years were the Kirkcaldy Area (48.5%), North East Fife (41.2%), Levenmouth (39.6%) and the Cowdenbeath Area (38.4%).

By the end of Q2 2023/24, there were **1,563 participants* on projects commissioned by the Opportunities Fife Partnership** (Figure 18).

626 of participants were on programmes run by the council's Employability Services (Figure 18). Dunfermline had the largest number of participants on council-run programmes (146) followed by the Kirkcaldy Area (113).

Source: Fife Council

Note: * the number of participants on employability programmes is higher than the total number of unique participants due to individuals participating in more than one programme.

Employability Support Activities:

UK Shared Prosperity Funding helped extend the No One Left Behind delivery priorities in 2022/23 based on need and the performance of existing providers. The commissioning approach for 2023 -2025 has been agreed by the Opportunities Fife Partnership and Fife Council.

The 21st **Fife Business Diversity Awards** took place in December 2023 recognising and celebrating the achievements of individuals, employers and employability providers in ensuring that people from all backgrounds are able to fulfil their work ambitions.

The total number of **Modern Apprenticeship** (MA) starts in Fife fell very slightly (by 6 people or -0.5%) after significantly increasing the year before. 72.9% of Fife's MAs completed their training in 2022/23, a higher rate than in 2021/22 (72%). There were 371 MA starts in Q1 of 2023/24. This is 38% (+103) higher than the same point last year (268).

The Employability Team supported **103 Modern Apprenticeships** across various Services within Fife Council and **146 Foundation Apprenticeships** (FAs) in the Education & Children's Services and Health & Social Care Directorates. Positive feedback was received from participants and school staff on the new one-year FA delivery model introduced in 2022/23 and this model is being continued in 2023/24.

Funding from Fife Council's allocation from the Scottish Government's Local Authority COVID Economic Recovery (LACER) fund was used to help establish **Midfield Skills and Development Centre** in Kirkcaldy as a training hub for Mid-Fife, with work ongoing to replicate this model in the West of Fife.

Fife Council's Culture of Enterprise Programme

Figure 19: Participation in Fife Council's Culture of Enterprise (CoE) Programme, 2022/23

	Cowdenbeath Area	Dunfermline	Glenrothes Area	Kirkcaldy Area	Levenmouth	North East Fife	South & West Fife	Fife
Number of different CoE activities in which schools participated	7	9	8	7	5	5	6	19
Instances of pupil engagement with CoE activities 2022/23*	2,825	15,211	4,058	7,950	6,078	6,375	11,885	54,399
<i>Instances of pupil engagement with CoE activities 2021/22*</i>	<i>11,293</i>	<i>30,680</i>	<i>13,679</i>	<i>6,835</i>	<i>12,452</i>	<i>8,990</i>	<i>28,123</i>	<i>112,052</i>

As in 2021/22, Dunfermline had more instances of pupil engagement with the council's Culture of Enterprise (CoE) activities than any other committee area followed by South & West Fife.

In 2022/23 there was a significant fall in pupil registrations for virtual CoE programmes due to decreased teacher capacity. The number of instances of pupil engagement was however still higher than in 2020/21 (22,148).

The CoE initiative delivered a **Food, Drink, Hospitality and Tourism Takeover Event** in January 2023 in partnership with Fife College, Developing the Young Workforce Fife, the Royal Highland Education Trust, Springboard, Food from Fife and local businesses. The event, attended by one hundred S2 pupils, was designed to encourage more young people to consider a career within the tourism and hospitality sectors.

There were 92 downloads of the CoE '**Race to Zero**' game (entrepreneurial and net zero skills video game); ten pupils from Bell Baxter High School completed a **heat pump construction project** which included a site visit to the University of St Andrews Guardbridge facility; and eight Fife schools won awards at the **Social Enterprise Academy Schools Awards**.

Source: Fife Council – Economic Development.

Note: * 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 average 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 there.

The Dunfermline & West Fife parliamentary constituency has both the highest resident and highest workplace earnings. This is the only part of Fife where average resident earnings are higher than Scottish average earnings (Figure 20).

The Glenrothes constituency has the lowest average resident earnings in Fife, and North East Fife the lowest average workplace earnings. North East Fife's workplace earnings are £96.80 lower than its resident earnings.

The proportion of employee jobs with hourly pay below the real living wage fell between 2021 and 2023 to its lowest level – 11.7% – although this rate is still higher than the Scottish rate (10.1%) (Figure 21).

Source: ONS Annual Survey of Hours and Earnings.

Notes: Estimates below the Fife level should be viewed with caution due to small sample sizes. As the data is based on PAYE it does not include the self-employed. Median weekly earnings = the median gross weekly pay for full-time workers. The estimates in Figure 21 for Fife's Parliamentary Constituency Areas are considered to be 'acceptable' rather than precise; those shown as N/A are considered unreliable for practical purposes.

Figure 20: Median Weekly Earnings, April 2023: UK Parliamentary Constituency Areas, Fife & Scotland



Figure 21: Percentage of employee jobs with hourly pay below Living Wage Foundation Rates

Area/Parliamentary Constituency	Apr-19	Apr-20	Apr-21	Apr-22	Apr-23
Dunfermline & West Fife	21.6%	12.1%	19.9%	N/A	N/A
Glenrothes	15.9%	14.2%	15.2%	13.4%	N/A
Kirkcaldy & Cowdenbeath	18.6%	14.5%	13.2%	N/A	15.2%
North East Fife	20.1%	21.4%	18.9%	N/A	17.3%
Fife	18.9%	14.9%	16.8%	12.5%	11.7%
Scotland	16.8%	15.1%	14.5%	9.4%	10.1%

Fife's Business Base & Key Sectors

Number and Size of Businesses

Figure 22: Number of Enterprises 2023: 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 2023	1,505	1,865	1,630	1,570	2,415	8,980	171,350
Percentage of Fife Total	16.8%	20.8%	18.2%	17.5%	26.9%	-	-
Change 2020-2023	-425	-155	-275	-60	+5	-920	-6,345
Percentage Change 2020-2023	-22.0%	-7.7%	-14.4%	-3.7%	+0.2%	-9.3%	-3.6%

Change in Number of Businesses 2020-2023:

Between March 2020 and March 2023, the number of enterprises in Fife fell by 920 businesses or -9.3%. This followed a period of sustained growth between 2015 and 2020. The number of businesses fell in all parts of Fife between 2020 and 2021; between 2021 and 2022, Mid Fife & Glenrothes and NE Fife both saw business numbers increase while the other SPCAs saw numbers continue to fall; between 2022 and 2023, the North East Fife SPCA was the only part of Fife to see numbers increase.

Cowdenbeath SPCA saw the largest fall between 2020 and 2023 (425 businesses or -22.0%); North East Fife saw business numbers increase overall (5 more businesses or +0.2%).

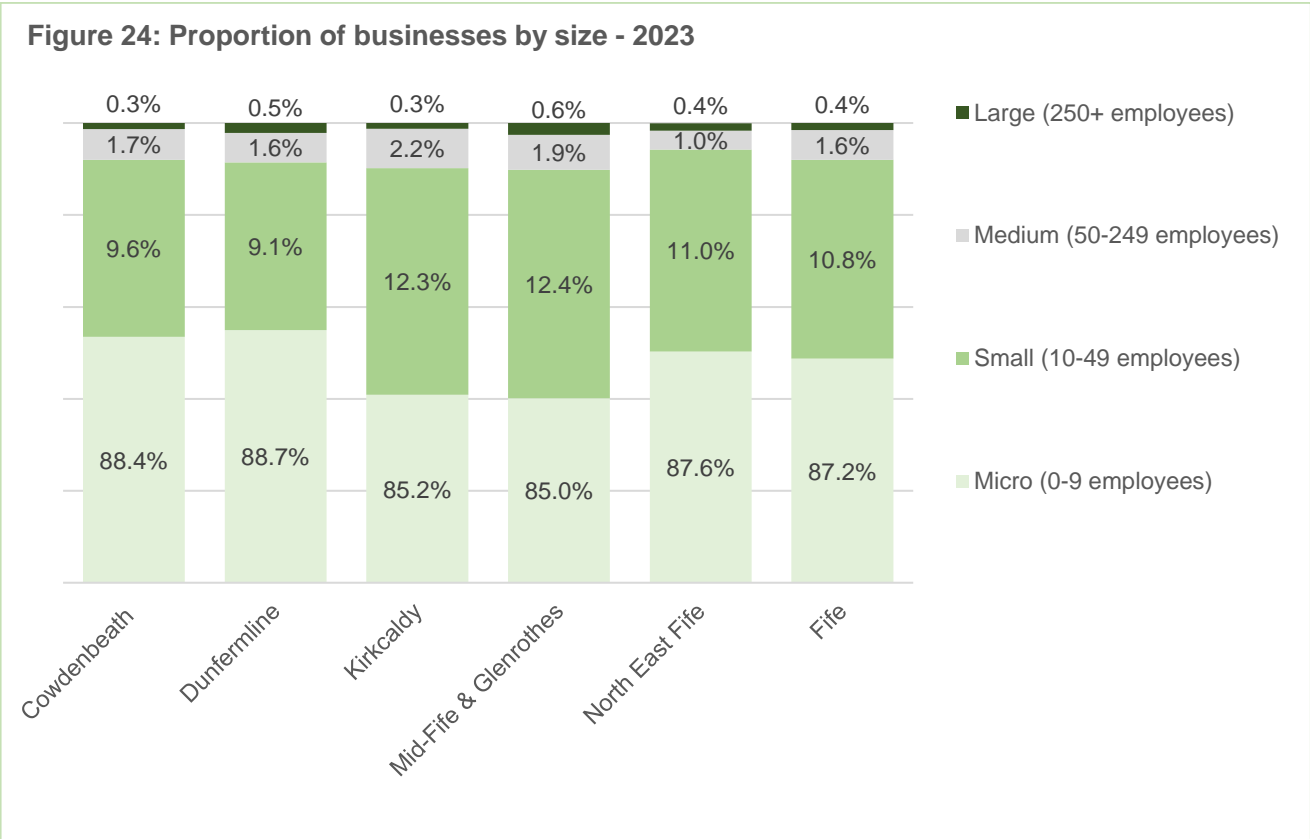
The highest decrease in numbers (-945 businesses) was within the micro (0-9 employees) size band. Mid Fife & Glenrothes and North East Fife both saw a fall in the number of medium-sized businesses (Figure 23 below).

Source: ONS UK Business Counts, 2023.

Note: The number of enterprises registered for VAT and/or PAYE that were live on 10 March 2023. Does not therefore include unregistered enterprises (sole traders and partnerships) who are not VAT and/or PAYE registered. As all numbers are rounded to the nearest zero or 5, all zeros are not necessarily true zeros, numbers below 10 should be viewed with caution and the Fife totals may not equal the sum of the five Fife SPCA figures.

Figure 23: Change in the number of enterprises by Scottish Parliamentary Constituency Area (SPCA) and Size 2020-2023

	Cowdenbeath SPCA		Dunfermline SPCA		Kirkcaldy SPCA		Mid Fife & Glenrothes SPCA		North East Fife SPCA		Fife	
	2023	Change 2020-23	2023	Change 2020-23	2023	Change 2020-23	2023	Change 2020-23	2023	Change 2020-23	2023	Change 2020-23
Micro (0 to 9 employees)	1,330	-430	1,655	-170	1,385	-275	1,335	-65	2,115	0	7,825	-945
Small (10 to 49 employees)	145	+5	170	+10	200	-10	195	+10	265	+15	970	+20
Medium (50 to 249 employees)	25	0	30	0	35	+5	30	-5	25	-5	145	-5
Large (250+ employees)	5	0	10	+5	5	0	10	0	10	0	35	0



Businesses by Size:

Kirkcaldy and the Mid-Fife and Glenrothes Scottish Parliamentary Constituency Areas have the highest proportions of small, medium, and large businesses (Figure 24).

Dunfermline SPCA has the highest proportion of micro businesses (88.7%) followed by Cowdenbeath (88.4%) and North East Fife (87.6%).

Source: UK Business Counts, 2023.

Note: The number of VAT and/or PAYE registered enterprises that were live on 10 March 2023. Does not therefore include unregistered enterprises (sole traders and partnerships) who are not VAT and/or PAYE registered. As all numbers are rounded to the nearest zero or 5, all zeros are not necessarily true zeros, numbers below 10 should be viewed with caution and the Fife totals may not equal the sum of the five Fife SPCA figures.

Business Densities

In 2023, Fife had a business stock rate, or business density, of 289 registered businesses per 10,000 resident adults (aged 16+) compared with 375 businesses per 10,000 adults in Scotland as a whole (Figure 25)

The North East Fife Scottish Parliamentary Constituency Area (SPCA) is the only part of Fife with an overall business density above the Fife rate. It has a much higher density of micro and small businesses than the rest of Fife.

The Dunfermline SPCA has the second highest density of micro businesses and Mid-Fife and Glenrothes has the second highest density of small businesses in Fife.

Cowdenbeath and Kirkcaldy SPCAs have the lowest business densities in Fife. Both areas would need a 50% increase in the number of registered businesses (746 and 791 additional businesses respectively) to reach the Scottish business density. The Cowdenbeath SPCA has the lowest rate of micro and small businesses in Fife

Source: ONS Business Counts 2023 and National Records for Scotland Mid-2021 Population Estimates.

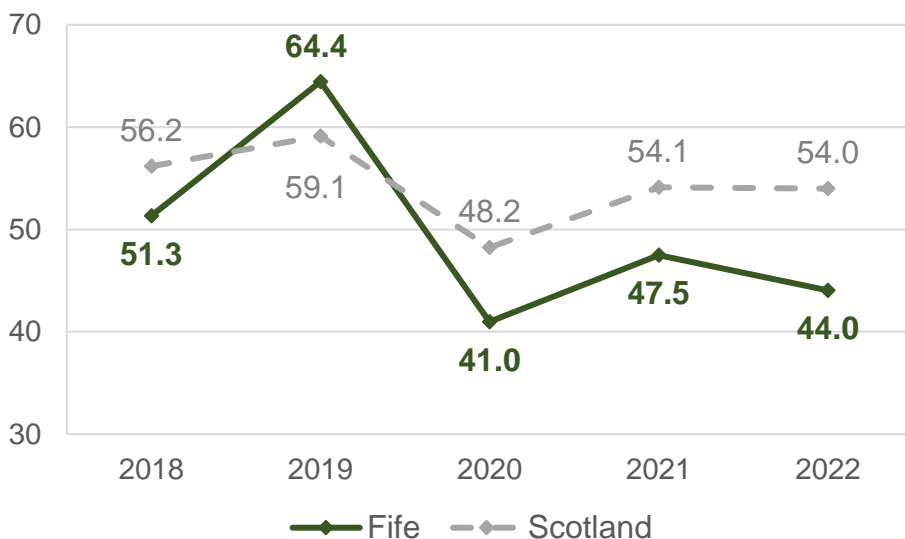
Note: These figures do not include unregistered enterprises (sole traders and partnerships who are not VAT and/or PAYE registered).

Figure 25: Number of registered businesses per 10,000 resident adults by enterprise size

Area	Micro (0-9 employees)	Small (10-49 employees)	Medium (50-249 employees)	Large (250+ employees)	All sizes
Cowdenbeath SPCA	222	24	4	1	251
Dunfermline SPCA	256	26	5	2	288
Kirkcaldy SPCA	215	31	5	1	253
Mid-Fife & Glenrothes SPCA	233	34	5	2	274
NE Fife SPCA	328	41	4	2	374
Fife	252	31	5	1	289
Scotland	328	40	6	2	375

Business Births

Figure 26: Business start-ups per 10,000 working age adults (16-64 years) 2018-2022



In 2022, both the number of new business start-ups and the business start-up rate in Fife fell after increasing the previous year.

A total of 1,020 new businesses started up in 2022, 80 or 7.3% less than in 2021.

In Scotland as a whole, the number of business births fell by only 0.2%.

The gap between Fife's start-up rate and that for Scotland as a whole increased in 2022 after narrowing the previous year (Figure 26).

Source: ONS Business Demography, UK (2022).

Note: These figures do not include unregistered enterprises (sole traders and partnerships who are not VAT and/or PAYE registered). They should be viewed with caution as they include registered holding companies and duplicate bank accounts.

Business Survival Rates

Figure 27: Survival of New Start Businesses 2022

	Percentage of businesses surviving 1 year (born 2021)	Percentage of businesses surviving 2 years (born 2020)	Percentage of businesses surviving 3 years (born 2019)
Fife	92.7%	71.6%	44.8%
Scotland	93.8%	74.2%	57.4%

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

In 2022, the 3-year survival rate of businesses in Fife (44.8%) was lower than in 2021 (55.5%) and 2020 (58.7%). Prior to the Covid-19 pandemic, Fife's 3-year business survival rates were higher than the national rates.

Source: ONS Business Demography, UK (2022).

Note: These figures do not include unregistered enterprises (sole traders and partnerships who are not VAT and/or PAYE registered).

Distribution of Employment

Figure 28: Number of Jobs in Fife 2019-2022

	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
September 2021	9,000	31,000	24,000	24,000	10,000	24,000	16,000	143,000
September 2022	9,000	31,000	22,000	25,000	10,000	24,000	16,000	140,000
% change 2019-2022	+12.5%	+6.9%	-12.0%	+13.6%	0.0%	+4.3%	-5.9%	+1.4%

Change in Number of Jobs:

The number of jobs in Fife fell in 2022, although employment in Fife in September 2022 was still higher than before the pandemic in 2019.

Between 2021 and 2022, the Kirkcaldy Area was the only part of Fife to see an increase in job numbers and the Glenrothes Area was the only part where employment fell. The Kirkcaldy Area saw the largest proportionate increase in employment between 2019 and 2022 followed by the Cowdenbeath Area; over the same period, the Glenrothes Area and South and West Fife both saw job numbers fall. (Figure 28).

Employment by Sector:

North East Fife has the largest share of Fife's jobs in Education, Accommodation & Food Services and Arts, Entertainment & Recreation (37.5%, 36.4% and 37.5% of Fife's jobs in these sectors respectively) (Figure 29 below).

45% of all employment in Public Administration & Defence Activities in Fife is located in the Glenrothes Area along with 31% of Fife's Manufacturing jobs.

56% of Fife's jobs in Agriculture, Forestry & Fishing* are located in Levenmouth.

75% of all employment in Financial & Insurance activities in Fife is located in Dunfermline, along with 62.5% of Fife's jobs in the Information & Communication sector.

Over a third (35%) 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 2019, 2020, 2021 and 2022.

Note: * The Fife totals include farm agriculture while the committee area figures exclude 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 29: Employment by Sector, Fife 2022

Sector	Cowdenbeath Area	Dunfermline	Glenrothes Area	Kirkcaldy Area	Levenmouth	North East Fife	South & West Fife	Fife
A : Agriculture, forestry and fishing*	15	10	50	35	400	125	75	710
B : Mining and quarrying	0	0	10	20	0	75	30	125
C : Manufacturing	1,000	1,500	4,000	1,250	1,750	1,250	2,500	13,000
D : Electricity, gas, steam and air conditioning	20	0	200	0	10	50	150	400
E : Water supply; sewerage, waste mgmt	50	75	150	75	40	50	175	600
F : Construction	1,000	1,250	900	1,750	450	1,250	1,000	8,000
G : Wholesale and retail trade; vehicle repair	1,500	4,000	3,000	4,500	1,000	4,000	2,500	21,000
H : Transportation and storage	600	3,500	500	300	800	400	800	7,000
I : Accommodation and food service activities	400	2,000	1,250	1,500	700	4,000	900	11,000
J : Information and communication	50	2,500	125	400	20	200	700	4,000
K : Financial and insurance activities	15	2,250	150	225	40	100	250	3,000
L : Real estate activities	100	250	350	150	50	350	75	1,250
M : Professional, scientific and technical acts	225	2,000	600	1,000	400	1,000	1,500	6,000
N : Administrative and support service acts	400	1,750	800	1,500	350	1,000	1,000	7,000
O : Public admin, defence, social security	600	1,500	4,500	2,250	175	450	1,000	10,000
P : Education	1,250	2,500	1,500	2,000	900	5,000	1,000	14,000
Q : Human health and social work activities	1,250	4,500	3,000	7,000	1,750	2,250	900	20,000
R : Arts, entertainment and recreation	300	700	350	600	305	1,500	350	4,000
S : Other service activities	250	800	800	500	150	900	300	3,500
Total Employment*	9,000	31,000	22,000	25,000	10,000	24,000	16,000	136,000

Source: ONS Business Register & Employment Survey 2022.

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.

Support Given to Businesses in Fife

Figure 30: Financial Support Given to Businesses in Fife 2022/23

	Cowdenbeath Area	Dunfermline	Glenrothes Area	Kirkcaldy Area	Levenmouth	North East Fife	South & West Fife	Fife
No. of businesses supported	9	11	14	20	9	18	7	88
Value of financial support	£14,430	£27,473	£24,730	£44,855	£24,600	£59,972	£16,704	£212,764
Jobs created as a result of financial support	20	6	32	29	22	16.5	7	132.5

Source: Fife Council Economic Development.

Note: includes support given to businesses by the Fife Investment Fund and Young Persons' Start-Up Grant (Fife Council funded) and the SME Competitiveness Fund (European Regional Development Fund funded)

Figure 31: Number of Business Start-Ups supported by Business Gateway Fife (BGF) 2022/23

	Cowdenbeath Area	Dunfermline	Glenrothes Area	Kirkcaldy Area	Levenmouth	North East Fife	South & West Fife	Fife
No. of businesses receiving Expert Help	13	22	25	22	4	38	11	135
No. of businesses accessing business growth services	99	160	212	215	82	328	152	1,248
No. of Business Gateway-supported start-ups	51	70	59	116	47	85	68	503*
No. of jobs created from BGF start-up support	119	83	77	147	57	117	95	702**
Turnover generated	£2,591,500	£2,187,500	£1,830,500	£3,331,500	£1,320,000	£3,135,500	£2,631,000	£17,147,500**

Source: Business Gateway Fife.

Note: * total includes 139 businesses with an invalid or non-Fife postcode; ** 7 start-up clients provided a postcode outwith Fife. This can happen when the client lives outwith Fife but intends to start a business in Fife. These 7 starts were projected to create 7 jobs and generate £120,000 in turnover. These figures are included in the Fife totals.

Support to Businesses:

During 2022-23 Business Gateway Fife and Fife Council Economic Development provided advice, signposting and support to **over 500 start-up businesses** in Fife, the third highest number across all Scottish local authority areas. This support is estimated to have helped create 702 jobs and a projected turnover of £17.1m. Year to date figures indicate that Business Gateway Fife is on track to support 600 start-up businesses in 2023/24. Over 2,900 new and existing businesses in Fife received advisory support from Business Gateway Fife.

The Economic Development Team delivered a **Net Zero Transition Fund** using £1.23m from the Scottish Government's Local Authority COVID Economic Recovery (LACER) fund to provide non-repayable grants of up to £3,000 to 413 Fife SMEs to introduce measures to improve their energy efficiency.

Support for businesses to achieve their Net Zero ambitions in 2023/24 is being provided through a **SME Development Grants Scheme** funded by the UK Government's Shared Prosperity Fund (UKSPF). The SME Development Grant also provides support for workforce upskilling, attending trade shows, R&D/innovation and agriculture business diversification. To date 111 applications worth £256k have been approved.

During 2022/23, the **Trade Development Programme** supported 33 businesses to attend and exhibit at 11 trade shows and 45 businesses were supported at 5 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.

In 2022/23, the **Supplier Development Programme** helped 281 Fife businesses improve their tendering skills. 1,023 Fife companies are now registered with the programme (16 more than the previous year) which offers expert training, support and information to help businesses win public sector contracts.

In April, 39 Fife businesses attended a Meet-the-Contractor event to learn about supply chain opportunities arising from the **Halbeath Learning Campus and Westfield Energy Plant** and 126 businesses attended a **Meet-the-Buyer event in November**.

Over 30 events took place during the 13th **Fife Business Week** in November 2022 attracting 700 registrations from businesses.

2022/23 was the final year of the European Regional Development Fund (ERDF) funded **Business Competitiveness Programme** which between April 2016 and March 2023 brought in £1.5m of funding used to support Fife's businesses.

Delivery of business support services funded by the UK Shared Prosperity Fund (UKSPF) started in 2022/23 with the launch of a **Fit for Defence training and upskilling programme**. 14 businesses attended the programme's initial information session and launch workshop. The aim of the programme, which is being delivered in 2023/24, is to improve opportunities for Fife businesses wishing to work in the defence sector or to increase the market share of companies already working within the sector.

In addition to the SME Development Grants mentioned above, UKSPF funding has to date delivered consultancy support worth £58k to 35 businesses under **Business Gateway Fife's Specialist Business Advice programme** and 69 **start-up grants** worth £33k. This activity will increase in 2023/24 as UKSPF fully replaces EU funding.

Fife's **Food and Drink Strategy - Food4Fife 2023-30 - and Action Plan**, which aims to promote, educate and encourage the production of quality food and drink produce from Fife, were finalised.

Remediation of Vacant & Derelict Land

Figure 32: Extent of Vacant & Derelict Land in Fife 2023

Area Committee	Proportion of Fife's total Vacant & Derelict Land	Total Amount of Vacant & Derelict Land (ha)	Change in amount of Vacant & Derelict Land 2022-23 (ha)
Cowdenbeath	4.0%	28.5	+2.1
Dunfermline	1.3%	9.2	-2.2
Glenrothes	21.9%	156.2	-0.4
Kirkcaldy	5.8%	41.2	-0.9
Levenmouth	10.2%	73.1	+5.6
North East Fife	8.3%	59.5	-1.0
South and West Fife	48.5%	345.7	-9.0
Total Fife	100.0%	713.3	-3.9

Source: Fife Council Vacant & Derelict Land Audit 2023

In 2023, there were 203 vacant & derelict land sites across Fife amounting to 713 hectares (Figure 32). Since 2022, 13 sites representing 15.6 hectares of land have been brought back into use (although this decrease in hectareage is also due to revised measurements of site boundaries).

Derelict land has a broader impact than vacant land both in terms of total area (604.6 ha) and in the number of individual sites (154).

South & West Fife contains the largest proportion of vacant & derelict land (49% of Fife's total) and the Dunfermline Area the lowest (1.3%); eight sites each covering more than 20 hectares are located in South & West Fife.

Since 2015/16, Fife Council has been one of five local authorities to receive funding from the Scottish Government's Vacant & Derelict Land Fund; in 2022/23, Fife was awarded £1.451 million from the fund.

Figure 33 below details a selection of current, proposed and completed projects supported by the Vacant & Derelict Land Fund.

Figure 33: Projects in Fife supported by the Vacant and Derelict Land Fund (VDLF)

Area Committee	Project
Cowdenbeath	<ul style="list-style-type: none"> • Ground stabilisation in support of Industrial estate regeneration at The Avenue, Lochgelly to support and unlock Fife i3 investment*. • Demolitions, ground remediation and stabilisation in advance of proposed mixed-use affordable housing and commercial developments in town centre sites in Cowdenbeath and Lochgelly (in partnership with Kingdom Housing and Ore Valley Housing Associations) to support and unlock Fife i3 investment*.
Glenrothes	<ul style="list-style-type: none"> • Industrial estate regeneration at Queensway Industrial Estate, Glenrothes with Phase 1 now complete and all new units let. Further VDLF investment now in place to support a further phase of works at units on Flemington Road which will be complemented by Fife i3 investment*.
Kirkcaldy	<ul style="list-style-type: none"> • The proposed acquisition and remediation of a former Waste Transfer Site in Kirkcaldy. • Works on entry to the Ravenscraig Walled Garden area to support the future re-use of listed buildings and complement other investment in the adjacent site which is now leased to Rural Skills Scotland.
Levenmouth	<ul style="list-style-type: none"> • Making the former Flax Mill at Silverburn Country Park, Levenmouth, wind and watertight in advance of redevelopment works. • Site remediation and preparation works for the oil and gas decommissioning facility at Energy Park Fife now being operated by Cesscon Decom Ltd. • Industrial estate regeneration at Levenmouth Business Park Muiredge and Mountfleurie. • Ground investigations and remediation projects in support of the SEPA-led 'Leven Programme' one of which won a national (UK-wide) Brownfield Award for Best Preparatory Work in October 2022. • The proposed acquisition and stabilisation of ground at Chemiss Road /School Road in Methilhill in support of community-led nature-based learning provision for local young people.
North East Fife	<ul style="list-style-type: none"> • Ground remediation/preparation works to the east of the Eden Campus in Guardbridge for the installation of a solar photovoltaic array which was officially opened in May 2022. • Demolitions, ground investigations and preparation in advance of a mixed-use affordable housing and commercial development at the Bonnygate/Inner Court in Cupar in partnership with Kingdom Housing Association. • Ground de-contamination and preparation work at the site of the former Abertay Steelworks in Tayport. Ownership of the site was taken over by the local Community Trust and now hosts a new-build Community Hub, called the Larick Centre.
South and West Fife	<ul style="list-style-type: none"> • Industrial estate regeneration at Hillend in Dalgety Bay to support Fife i3 investment*. • Proposed acquisition and ground remediation/preparation of a site in Rosyth in support of a partnership project involving the Polish Consulate in Edinburgh, Babcock International and others to commemorate the loss of a Polish Navy submarine, ORP Orzel, which was lost on patrol while operating out of Rosyth in World War II.

Figure 33: Projects in Fife supported by the Vacant and Derelict Land Fund (VDLF) (continued)

Area Committee	Project
All Fife	<ul style="list-style-type: none"> Support for the implementation of the Climate Fife Plan and its associated Sustainable Energy Action Plan (SECAP) including part-funding an ongoing Community Renewables Feasibility Study led by the Fife Community Climate Action Network focussed on a range of vacant and derelict sites which could host solar photovoltaic arrays on sites across Fife. Funding is also supporting feasibility work, in collaboration with the Coal Authority and British Geological Survey, to assess potential locations for use of mine water geothermal heat schemes in Fife.

Source: Fife Council

Note: * Investment from the Fife Industrial Innovation Investment (i3) Programme funded by the Edinburgh & South-East Scotland City Region Deal – see Figure 34 and the section below.

Strategic Investment

Figure 34: Edinburgh & South East Scotland City Region Deal Fife Industrial Innovation Investment (i3) Programme Investment Status

Area Committee	Tranche 1 Sites	Status at November 2023	Tranche 2 (2022-25) Sites	Expected Completion
Cowdenbeath	The Avenue, Lochgelly (site servicing)	Conditional Legal Agreement in place for disposal.	New Business Accommodation, Town Centre, Cowdenbeath	2026/27
Dunfermline	Fife Interchange North, Dunfermline (site servicing)	Conditional Legal Agreement in place for disposal.	Fife Interchange North, Dunfermline (new units) - construction ongoing	2025/26
Glenrothes	Queensway Industrial Estate, Glenrothes (new units)	Completed: 5 out of 7 new business units let.	Refurbished/New Units, Flemington Road, Queensway Industrial Estate	2024/25
Kirkcaldy	Dunnikier Business Park, Kirkcaldy (new units)	Completed: All new business units fully let.	John Smith Business Park (new units)	2026/27
Levenmouth	Levenmouth Business Park (Phase 1) (new units)	Due for completion 31/12/23.	Levenmouth Business Park (Phase 2) (new units)	2024/25

Figure 34: Fife Industrial Innovation Investment (i3) Programme Investment Status (continued)

Area Committee	Tranche 1 Sites	Status at November 2023	Tranche 2 (2022-25) Sites	Expected Completion
South & West Fife	Hillend and Donibristle Industrial Estates, Dalgety Bay	Completed: All new business units fully let.	Hillend and Donibristle Industrial Estates: Conditional Legal Agreement in place for disposal at Ridgeway	2024/25

Strategic Investment:

The **Fife Industrial Innovation Investment Programme (Fi3P)** is a £50 million ten-year programme delivered by Fife Council with grant funding from the Edinburgh and South-East Scotland City Region Deal. The programme is delivering new industrial, office and business space and serviced employment sites within existing business clusters in Mid and South Fife adjacent to growth corridors (M90 and A92) (Figure 34). The Fi3P started in April 2019; Tranche 1 (Years 1-3) was completed in March 2022. Tranche 2 is underway and will complete in March 2025. There is a third tranche of activity for this investment programme from 2025-2029; these projects are not included as they are subject to approval of the Full Business Case in 2024/25.

The **University of St Andrews' Eden Campus** in Guardbridge has completed the current phase of investment being funded as part of the **Tay Cities Region Deal**. Design work for an Enterprise Hub at the Campus is underway; this is scheduled for completion in 2025/26.

In January 2023, the UK and Scottish Governments announced that the **Firth of Forth would host one of Scotland's first Green Freeports**. The successful bid by a public-private consortium led by the Forth Ports Group and including Fife, Falkirk and Edinburgh City Councils includes the creation of an internationally-renowned port and shipbuilding, manufacturing and logistics cluster at Rosyth.

The **Arrol Gibb Innovation Campus** was officially launched in April 2022. A collaboration between Babcock International, the Universities of Edinburgh and Strathclyde, Fife College, Fife Council, Scottish Enterprise and Skills Development Scotland, the Campus at Babcock International's Rosyth facility will see the development of leading expertise in five core capabilities on one site. The first facility to open for business in the Campus was the new £4.6m Fastblade testing facility for tidal turbine blades developed by Babcock International and the University of Edinburgh as part of the Edinburgh and SE Scotland City Region Deal which was officially opened in May 2022.

The **Levenmouth Reconnected Programme** has approved £2.3m of funding for the following projects in the area: Levenmouth Business Park (£714k), Silverburn Park Flax Mill (£500k), the Community Trade Hub's Positive Futures Project (£200k), Kennoway Pump Track (£44k), the CLEAR Buckhaven and Methil's Green Network Enhancement Initiative (£180k) and Mountfleurie Business Park Site Servicing (£683k). This investment supports £10.3 million match-funding and the Mountfleurie Business Park is expected to lever £4-£5 million private sector investment.

Fife Council, the Fife Partnership and the UK Government have agreed **Fife's UK Shared Prosperity Investment Plan** for the grant allocation of £13.4m to be invested by March 2025. There are 4 investment priorities: Communities & Place, Supporting Local Businesses, People & Skills and Multiply. Delivery started in Quarter 4 2022/23. The priority is to sustain activities previously funded through EU funding that deliver the 2017-27 Plan For Fife's ambitions.

Strategic Investment (continued):

The **River Leven Regeneration Programme** (Riverside Park, Glenrothes and Leven Connectivity Projects) was awarded £19.4m of Levelling Up grant for the regeneration of Riverside Park in Glenrothes (£4.98m) and Phase 1 of improvements to Connectivity in Levenmouth (River Park Routes and On road active travel network) (£14.43m). Design work is underway with construction expected to start in Quarter 4 2023/4 and complete by Quarter 4 2024/5.

Town Centres

Figure 35: Percentage of vacant town centre retail units 2019-2023

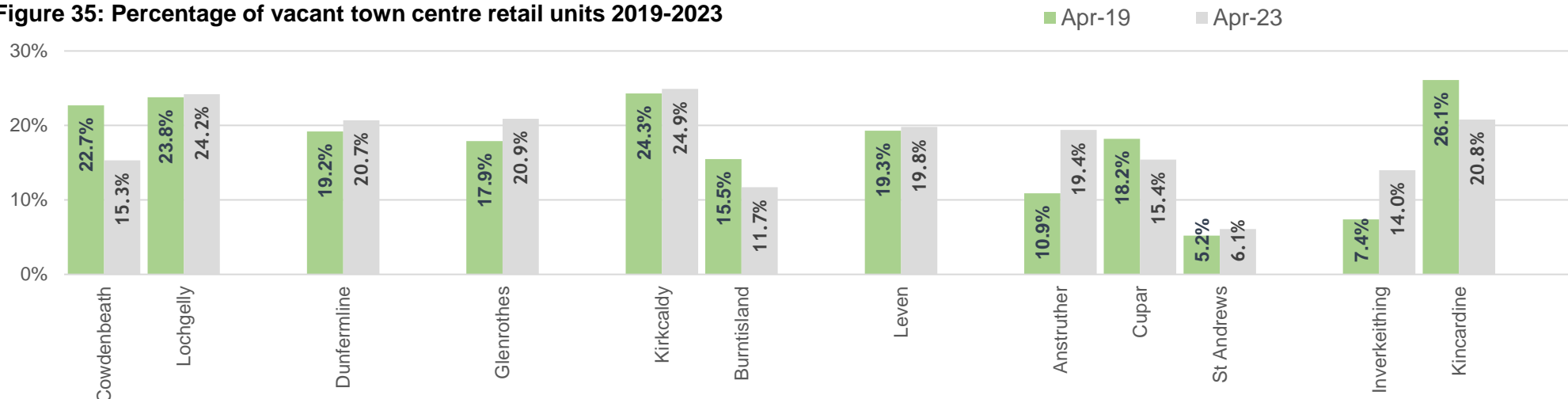


Figure 36: Town Centre Vacancy rates April 2023

Area Committee	Town Centre	% of Vacant Units	% of Vacant Floor Space
Cowdenbeath Area	Cowdenbeath	15.3%	12.4%
	Lochgelly	24.2%	23.1%
Dunfermline Area	Dunfermline	20.7%	29.2%
Glenrothes Area	Glenrothes	20.9%	24.3%
Kirkcaldy Area	Kirkcaldy	24.9%	28.5%
	Burntisland	11.7%	12.0%
Levenmouth	Leven	19.8%	21.0%
North East Fife	Anstruther	19.4%	26.8%
	Cupar	15.4%	18.1%
	St Andrews	6.1%	4.6%
South & West Fife Area	Inverkeithing	14.0%	13.8%
	Kincardine	20.8%	41.2%

St Andrews, Burntisland, Cowdenbeath and Inverkeithing have the lowest vacancy rates of Fife's main town centres (Figure 36).

The highest vacancy rates are found in Kirkcaldy, Dunfermline and Kincardine.

Whilst most town centres saw the proportion of vacant retail units rise between 2019 and 2023 (Figure 35), Cowdenbeath, Burntisland, Cupar and Kincardine all saw vacancy rates fall.

Source: Experian GOAD Data (Fife Council).

Figure 37: Grants awarded to businesses through the Town Centre Building Improvement Grant Scheme 2022/23

	Cowdenbeath Area	Dunfermline	Glenrothes Area	Kirkcaldy Area	Levenmouth	North East Fife	South & West Fife	Fife
Number of grants awarded	2	5	2	9	4	4	3	29
Value of grants awarded	£17,744	£45,027	£16,824	£77,473	£36,285	£32,792	£26,030	£252,175
Total value of grant funding claimed (as of 30 Sept 2023)	£0	£14,012	£12,279	£40,582	£22,709	£32,792	£10,000	£132,373

Source: Fife Council Business & Employability Service.

Town Centre Activity:

- Fife's £2.75m allocation for 2022/23 from the Scottish Government's **Place-Based Investment Programme** supported the following projects:
 - phase 1 works to make St Margaret's House in Dunfermline wind and watertight (also supported by the UK Shared Prosperity Fund)
 - a Leven place-making project between the new railway station and existing bus station
 - phase 2 of the refurbishment of 9 Esplanade in Kirkcaldy by the Kings Theatre Trust (completed autumn 2023)
 - a multigenerational community training facility being developed at Rosyth by the Pars Foundation on behalf of Dunfermline Athletic Football Club
 - upgrading 9 business units at Lochgelly Business Park
 - 29 small businesses in town and local centres across Fife were awarded a grant to make upgrades to their property through the Building Improvement Grant scheme (which was also supported by the UK Shared Prosperity Fund) (Figure 37).
- 53 small businesses received grants of up to £5,000 from the **Town Centre Digital Improvements and Energy Efficiency Scheme 2022-23**. Funded by the Scottish Government's LACER Fund, the scheme also funded energy efficiency audits for 46 properties.
- Dunfermline** was awarded city status in May 2022 and the new Maygate Exchange in the city was opened in October 2022 with all five office units let.
- The refurbishment of Inverkeithing Town House, part of the **Inverkeithing** built heritage programme, reached practical completion in December 2023.
- The National Lottery Heritage Fund and Historic Environment Scotland approved funding for the one-year Development Phase of the **Buckhaven** Area Heritage Regeneration Scheme, due to complete in October 2024.
- Phase 2 of **Kirkcaldy's** Waterfront Improvements was completed in autumn 2023. A business case for the demolition of Kirkcaldy's multi-storey car parks is being produced; funding for the site's demolition and restoration has still to be secured.
- A package of support measures was provided to businesses in **Leven** High Street following several building fires and temporary disruptions to business caused by roadworks related to the H100 and the Levenmouth Rail Link Projects.
- The **Scotland Loves Local Gift Card** is being rebranded to **Fife Loves Local** with a focus on Levenmouth and Dunfermline.

Tourism

Figure 38: Volume and Value of Visitors, Jan-Dec 2022

STEAM* Indicators	St Andrews	Dunfermline Area	Kirkcaldy and Mid Fife	NE Fife (exc. St Andrews)	Fife
Visitor numbers	700,560	797,010	685,260	522,890	2.71m
% change in visitor numbers 2021-2022	+85.7%	+50.9%	+46.6%	+39.8%	+54.9%
% change in visitor numbers 2019-2022	+2.9%	-2.3%	-6.8%	-7.2%	-3.2%
Economic impact (direct, indirect & induced)	£146m	£110m	£96m	£98m	£450m
% change in economic impact 2021-2022**	+72.3%	+51.4%	+33.9%	+39.1%	+50.2%
% change in economic impact 2019-2022**	+21.3%	+9.3%	-2.1%	+20.0%	+12.3%
Number of Full Time Equivalent (FTE) jobs supported by visitor expenditure	1,438	1,368	1,239	1,495	5,541
% change in number of FTE jobs 2021-2022	+38.0%	+34.5%	+24.9%	+15.7%	+27.6%
% change in number of FTE jobs 2019-2022	+5.7%	-2.5%	-7.1%	+7.5%	+1.0%

Source: Fife STEAM Reports for 2011-2022 - FINAL, Global Tourism Solutions (UK) Ltd.

Notes:

*STEAM is a tourism economic modelling tool owned by Global Tourism Solutions (GTS) UK Ltd and is used by most visitor destination areas in the UK. 'Visitors' include staying visitors (tourists staying overnight for at least one night) and day visitors visiting the area on a non-routine and non-regular leisure day trip from a home or holiday base.

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The areas relate to Fife's Local Tourist Associations (LTAs) as follows: St Andrews=St Andrews LTA; NE Fife=Cupar & North Fife and 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 Visitors (Figure 38 above):

- In 2022, Fife received **2.7 million visitors** – 97% of the number of visitors in 2019, the year before the pandemic and restrictions on travel.
- Between 2020 and 2022, the economic impact of visitors to Fife increased by **189% to £450 million**, a higher value than prior to the pandemic (£400.9m in 2019) (in 2022 prices).
- St Andrews saw the greatest rate of recovery in 2022, the year it hosted the 150th Open (see below).

Fife Tourism Activity:

- The **Fife Tourism Strategy** was refreshed during 2022/23 and a new 2023-30 Fife Tourism Strategy was approved by Fife Council's Cabinet Committee in September 2023.
- **Welcome to Fife destination marketing campaigns** included social media partnerships with The Herald and The Scotsman, a series of films for Year of Stories and extensive social media campaigns delivered in partnership with VisitScotland. Its biggest ever marketing campaign was launched in October 2023; The Kingdom – Where it Begins included partnerships with Expedia, Tripadvisor, Coast and National Geographic Magazines and Scotrail as well as extensive social media and influencer activity.
- In 2023, Welcome to Fife had a strong focus on developing the **travel trade market**, giving training and support to businesses to help them develop their online bookable product offerings and extend their market reach.
- **WorldHost customer service training** was delivered to over 50 people working in Fife tourism businesses in 2022/23.
- In 2022, £41,570 was awarded to event organisers through the **Fife Strategic Events Fund** which supports events that attract at least 30% of their attendees from outwith Fife.
- Research commissioned to **identify growth opportunities for tourism in Fife** provided a series of recommendations for promoting and developing tourism in Fife.
- The **Fife 191 trail** was launched with active travel options.
- The **150th Open** in July 2022, which attracted a record 290,000 fans to St Andrews, brought in £106m and generated over £300m in economic benefit for Scotland – the greatest economic impact in the history of the Championship - according to an independent study commissioned by The R&A, VisitScotland and Fife Council. The study estimated that Fife received £61m of new money from the event.
- A tourism action plan was developed for **Levenmouth** linked to the opening of the new rail link in 2024 and a Tourism Project Co-ordinator (funded by Levenmouth Area Committee) was appointed.
- The **Forth Bridges Trail** was launched in November 2022.
- A promotional campaign for **Kirkcaldy** was delivered for the Adam Smith tercentenary celebrations.
- Following a strategic tourism evaluation of **Dunfermline**, a multi-partner 5-year tourism action plan was developed for Scotland's newest city.

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