

Economic Profile **ST ANDREWS**



Winter 2007

Produced by Fife Council on behalf of the Fife Economic Forum

Background

Brief History

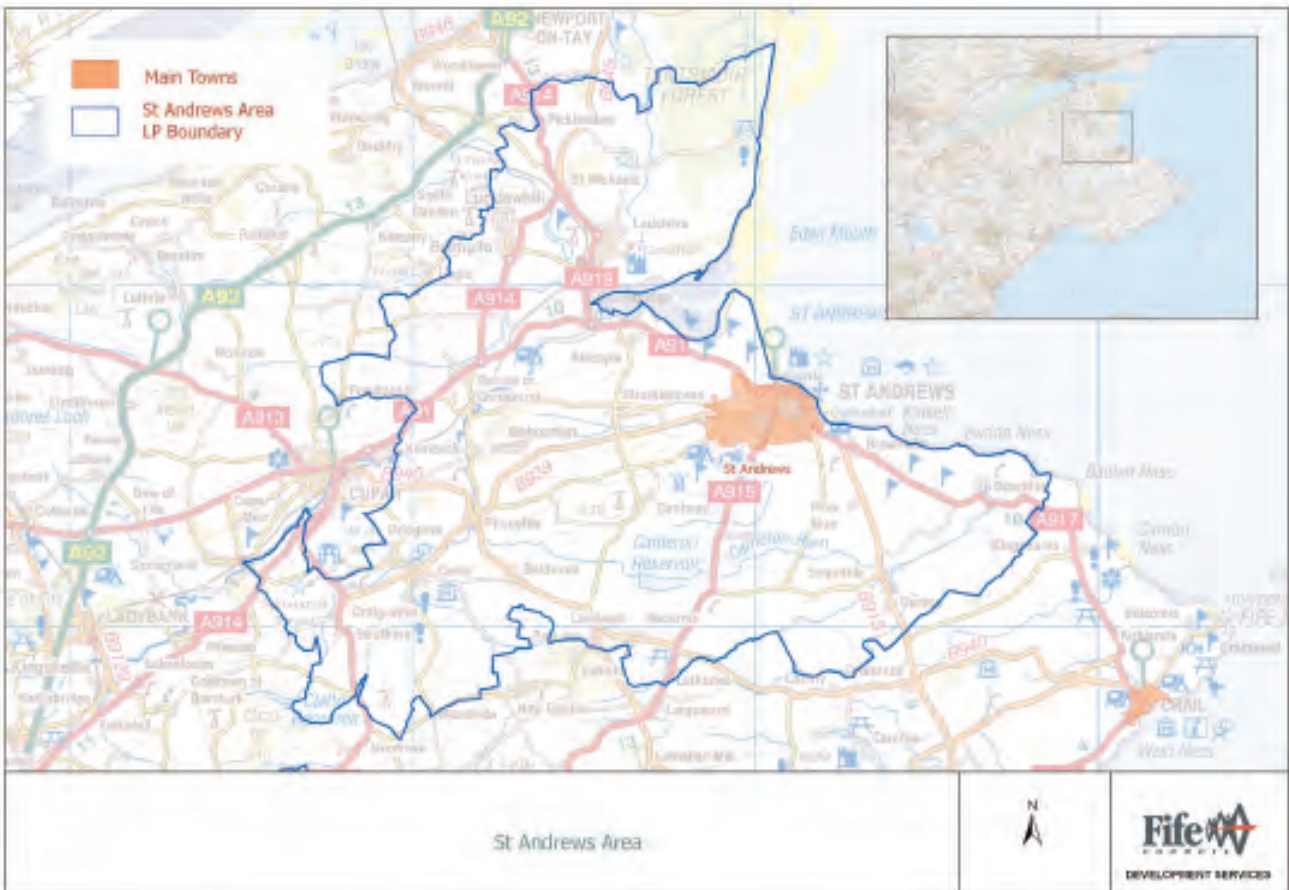
St Andrews is the largest town in East Fife and one of Scotland's most popular places to live. The town takes its name from St Andrew the Apostle whose relics, according to legend, were brought to the area by St Rule. Part of the town's prestige can be traced back to medieval times, when it became an important centre for religion and learning. The University of St Andrews founded in 1411, is the oldest university in Scotland and the third oldest in Britain.

It is claimed that the game of golf originated in St Andrews and golf has remained a popular sport in the area for over 600 years. The Old Course in St Andrews is arguably the most famous course in the world, and the town is home to the Royal and Ancient Golf

club, the governing body for the rules of golf worldwide (except USA). Famous people from St Andrews include Andrew Bell (1753-1832), founder of the Madras System of Education; Scottish painter Wilhelmenia Barns-Graham (1912-2004) and singer KT Tunstall (b.1975).

Land Supply

The St Andrews area, based on the current Local Plan Boundary, covers an area of land equivalent to 22,290 hectares. The town of St Andrews covers approximately 550 hectares of land, or 3% of the wider St Andrews area.



Location

Proximity to Key Cities

By Road:

Drive time to key cities, ferry terminal and airport.

Destination	Distance	Travel time
Aberdeen	79 miles	1 hr 25 m
Dundee	13 miles	25 m
Edinburgh Airport	52 miles	1 hr 20 m
Edinburgh City Centre	55 miles	1hr 30 m
Glasgow	74 miles	1 hr 45 m
Rosyth Ferry Terminal	45 miles	1 hr 5 m

Source: www.theaa.com

By Rail:

Leuchars Railway Station on the east coast main line is the nearest rail link to St. Andrews. Taxis and buses from the train station take approximately 10-15 minutes to reach St Andrews town centre.

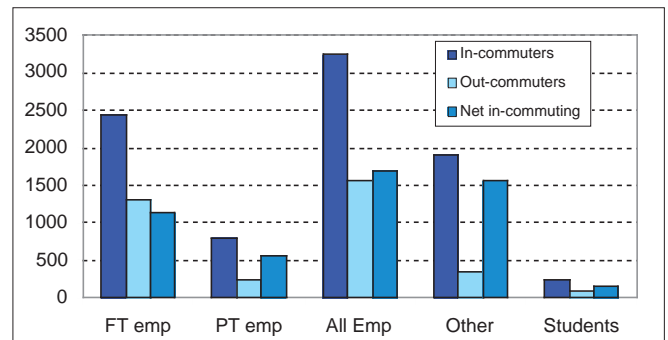
By Bus:

St Andrews Bus Station is located on City Road at the west end of the town centre. There are regular bus services to the rest of Fife and beyond to Dundee, Glasgow and Edinburgh.

Commuting Patterns

In 2001 the number of people commuting into St Andrews for work was 3,247 and the number commuting out from St Andrews for work was 1,554. This gives a net commuting inflow of 1,693. Much of this in-commuting is likely to be to the University of St Andrews which is the town's single largest employer. The number of students commuting to St Andrews is more than 2.5 times greater than those out-commuting. This gives a net commuting inflow of 146 students.

Commuting in-flows and out-flows (2001)



Source: *Travel-to-work statistics, 2001 Census*

Demographics

Population

According to the General Register Office for Scotland (GROS), St Andrews population in 2006 was estimated at around 17,000. This estimate is based on an aggregation of GROS data zones 2980-2987 and 2989-2999, and includes the resident student population. Just over one third of St Andrews population are aged 16-24 years, which is much higher than the corresponding figures for Fife and Scotland which are around 12%. The share of retirement age population in St Andrews is also slightly higher than average.

Size of working age population (2006)

	Under 16	Working age (16-64)	Over 64
Number	1,631	12,430	2,951
Percentage	9.6%	73.1%	17.3%

Source: GRO Scotland

Socio-Economic Classification

Given the large student population in St Andrews it is not surprising that more than 42% of those aged 16-74 are classified as full-time students.

The proportion of the population working in managerial and professional occupations in St Andrews is approximately two and a half times the Fife and national average.

Fewer than 20% of St Andrews resident population are employed in technical, lower supervisory or routine occupations. This is more than 10% below the Fife and Scottish figures.

Socio-economic classification of working age population (2001)

	St Andrews (%)	Fife (%)	Scotland (%)
Higher managerial & professional occupations	15.8	5.7	6.8
Lower managerial & professional occupations	22.0	30.5	32.5
Lower supervisory, technical & intermediate occupations	5.4	8.3	7.4
Semi-routine & routine occupations	14.5	25.9	22.9
Long term unemployed/ never worked	0.0	3.8	4.2
FT student	42.3	6.8	7.1
Not classified for other reasons	0.0	18.7	19
Total aged 16-74	12,761	235,060	3,730,706

Source: 2001 Census

Labour Market

Economic Activity

Economic inactivity rates in St Andrews are higher than average at 47%. Within St Andrews, Central and West St Andrews have the highest rates of economic inactivity, which likely reflects the larger than average student population and an above average share of retired population.

Economic activity rates - all persons (2001)

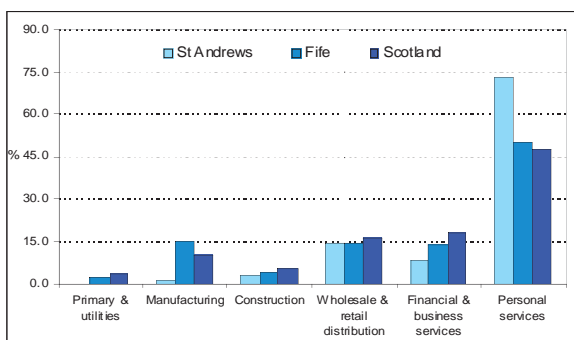
	Economically active (%)	Economically inactive (%)
St Andrews	52.6	47.4
Fife	65.7	34.3
Scotland	65.0	35.0

Source: 2001 Census

Employment

Industrial Structure of Employment (2005)

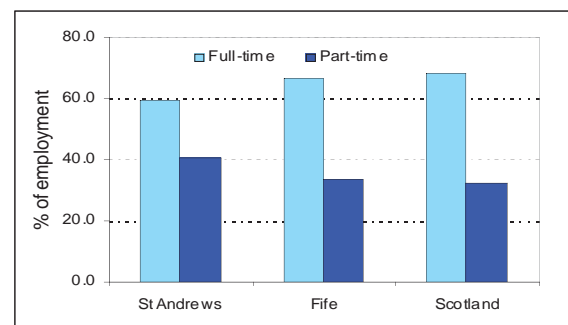
Although one of the main employers in St Andrews is a paper manufacturer, St Andrews is significantly under-represented in manufacturing employment. Employment in construction and financial & business services is also lower in St Andrews than the Fife and Scottish averages. There is a higher concentration of employment in personal services, particularly in education and tourism-related employment.



Source: Annual Business Inquiry, NOMIS

Employment Status (2005)

St Andrews has a slightly higher share of part-time employment. This may reflect the structure of employment which is skewed towards education and tourism, and creates more opportunities for flexible, part-time working.



Source: Annual Business Inquiry, NOMIS

Labour Market

Main Employers in the Area

The University of St Andrews is by far the largest employer in the town with around 2,000 staff. The university provides a mix of employment including academics, I.T., administration, and other ancillary staff. Tourism is a key employer and there are three five stars hotels in the town; Fairmont St Andrews, The Old Course Hotel Golf Resort & Spa, and Rufflets Country House and Garden Restaurant.



Company/Organisation	Nature of Business	Number Employed
University of St Andrews	Higher Education/ accommodation and corporate hospitality	2000+
Curtis Fine Papers	Paper manufacturer	250-400
Fairmont	Hotel/ Corporate hospitality/ conference facilities	250-400
Old Course Hotel	Hotel/ Corporate hospitality/ conference facilities	100-249
Cartermill International	Information Services	25-99
The Scores Hotel	Hotel/ Corporate hospitality/ conference facilities	25-99
Rufflets Country House	Hotel/ Corporate hospitality/ conference facilities	25-99
Pagan Osborne	Legal Services	25-99
Murray Donald & Caithness	Estate Agents	25-99
Scotflow Ltd	Haulage Contractors	25-99

Source: Fife Council

Note: this is a snapshot of employment levels as at September 2007.

Claimant Count

East Fife has the lowest rates of unemployment across Fife. The August 2007 figures show fewer than 70 claimants in St Andrews (at 0.7%). The corresponding rate for Fife is 2.9%.

Claimant Count Levels in St Andrews

	Aug-07	Aug-02	difference	% change
All claimants	68	124	-56	-45.2
Male	47	91	-44	-48.4
Female	19	32	-13	-40.6

Source: Claimant Count, NOMIS

Qualifications & Skills

Education Providers

Secondary Schools in St Andrews 2005/06 School Roll

Secondary Schools	School roll
Madras College	1,683
St Leonards	n/a

Source: Scottish Schools Online, Scottish Executive Education Department

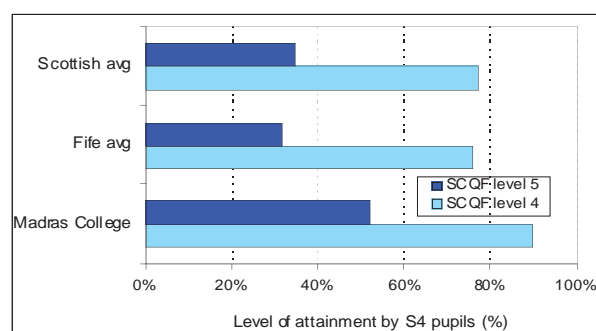
In addition to Madras College, St Andrews has St Leonards, a co-educational independent school for pupils aged 4-18. St Leonards has around 30 pupils of secondary school age. Educational attainment is shown for Madras College only, given that St Leonards has significantly fewer pupils, and the data cannot be disclosed at this level.

Standard and Higher Grade Attainment

SCQF LEVEL 4 & SCQF LEVEL 5

St Andrews has a higher attainment of standard grades, at both general and credit levels, than the Fife and Scottish averages. The attainment of SCQF level 4 was 90% compared to the 76% national average. Attainment of SCQF level 5 was 20% above average with 52% of S4 pupils gaining qualifications at this level.

S4 pupils attaining 5 or more Standard Grades at SCQF level 4 and level 5



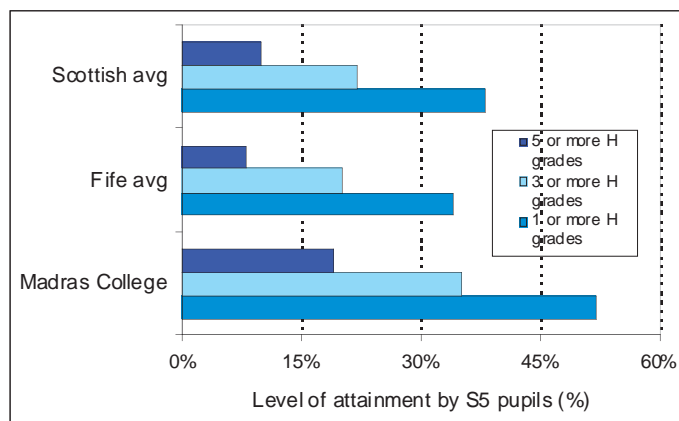
Source: Scottish Schools Online, Scottish Executive Education Department

Qualifications & Skills

SCQF LEVEL 6

SCQF Level 6 refers to Higher Grade attainment by 5th year students. More than half of S5 pupils in St Andrews attained at least 1 higher grade, which compares with the Scottish average of 38% and the Fife average 34%. The attainment of 5 or more higher grades in St Andrews is almost double the Fife and Scottish average at 19%.

S5 pupils attaining 1 or more Higher Grades (SCQF level 6)

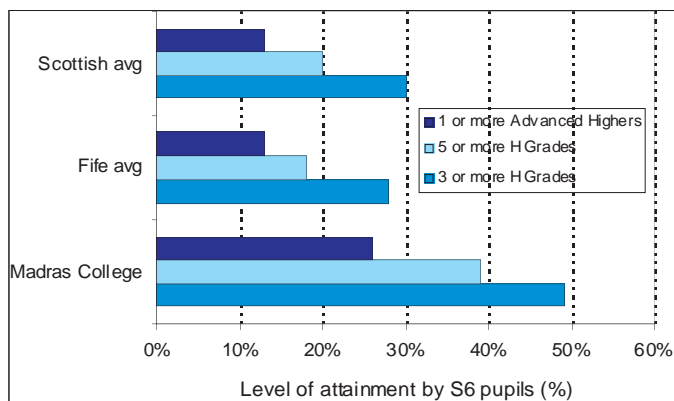


Source: Scottish Schools Online, Scottish Executive Education Department

SCQF LEVEL 7

SCQF Level 7 refers to qualifications at the advanced higher level (formerly known as sixth year studies). St Andrews attainment of advanced higher grades is twice the Fife and Scottish averages. In 2005-06, 26% of S6 pupils at Madras Academy gained advanced higher grades, twice the national average.

S6 pupils attaining Advanced Higher Grades (SCQF level 7)



Source: Scottish Schools Online, Scottish Executive Education Department

Qualifications & Skills

School Leaver Destinations

In the academic year 2005-06, almost three quarters of school leavers in St Andrews went into further or higher education (74%). At 45% St Andrews has one of the highest take-up rates of higher education in Fife.

St Andrews secondary school leaver destinations (S4-S6), 2005/06

	Madras College	Fife average	Scottish average
Higher education	45	28	30
Further education	29	32	23
Training	*	4	5
Employment	18	20	26
Other known	*	14	13
Not known	*	2	2

* Not disclosed due to confidentiality

Source: Scottish Schools Online, Scottish Executive Education Department

Post-School Education

The University of St Andrews is the oldest university in Scotland. In the academic year 2006-07, the university had 6,799 full-time undergraduate and post-graduate students across its four faculties Arts, Divinity, Medicine and Science. In a recent Teaching Quality Assessment (TQA) of the Scottish Higher Education Funding Council (SHEFC), St Andrews was awarded the highest average rating in Scotland.

The University of St Andrews is Scotland's top rated research institution and one of the leading research-intensive universities in the world. The university has over 40 research centres and institutes, and in 2006-07 received almost £37million in research grants.



Leisure & Community Facilities

Leisure amenities

- Ten golf courses in St Andrews, including several championship courses including the Old Course, New Course, Jubilee, Duke's, Fairmont St Andrews Bay, Drumoig and the St Andrews Links Golf Academy.
- Located 2 miles from St Andrews town centre, Craigtoun Country Park includes a miniature railway, boating pond, bowling and putting green, children's play area and café.
- St Andrews Aquarium.
- St Andrews has two beaches; the East and West Sands are Blue Flag beaches. The beaches link to the Fife Coastal Path, which is popular with walkers, bird watchers and sea-life enthusiasts.
- East Sands Leisure Centre with swimming pool, squash courts and fitness facilities.
- The Byre Theatre of St Andrews offers a varied programme of contemporary and classic drama, music, dance, opera, comedy and children's productions and workshops.
- Horse riding and pony trekking.
- St Andrews Harbour.
- Several Holiday Caravan Parks, Including Craigtoun Meadows and Cairnsmill Caravan Park.



Visitor attractions

- St Andrews Castle owned and operated by Historic Scotland. Some of the ruins date in part back to the 13th century.
- St Andrews Cathedral, maintained by Historic Scotland, and the Cathedral Museum containing medieval sculpture and other relics.
- The British Golf Museum exhibits the history of golf from the Middle Ages to the present day in both the UK and abroad.
- The St Andrews Museum has an exhibition exploring the heritage of the town, along with a temporary exhibition and event programme.
- The St Andrews Botanic Garden is an internationally recognised Botanic Garden providing seven acres of landscaped gardens and glass houses.
- Cambo Gardens, located just outside St Andrews has Victorian country house gardens designed around the Cambo Burn.

Retail



Shopping in St Andrews centres around four main streets: South Street, Market Street, Bell Street and Church Street. The town is characterised by small specialist shops.

Housing

House Completion Rates

House completion rates in St Andrews town have been fairly steady in the last five years, with 213 houses in total. Slightly more houses were built in 2004-05 than those built in the previous years.



Number of house completions

	2002-03	2003-04	2004-05	2005-06	2006-07	Cumulative 2002-2006
St Andrews	47	26	60	40	40	213
Fife	1,563	1,493	1,853	1,282	1,510	7,701
St Andrews as % of Fife	3.0	1.7	3.2	3.1	2.6	2.8

Source: Housing Land Review 2006, Fife Council

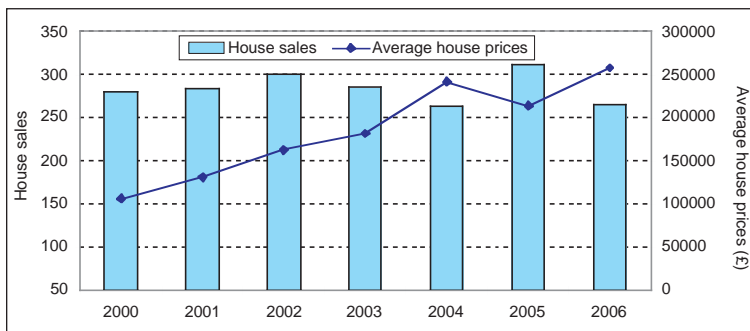
House prices

Houses sales have been steady in the last few years, and the property prices have risen steadily. Average house prices in St Andrews have risen from £106,000 in 2000 to £258,000 by 2006. Figures from HBOS for October 2007 show a 14.2% increase in average house prices in Scotland, rising to £141,158 in the third quarter of 2007.

House Buyers Moving to St Andrews

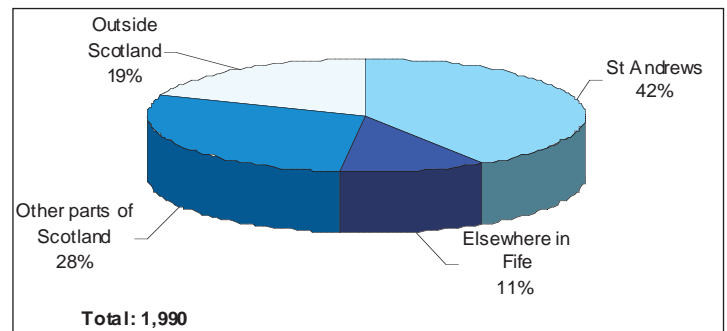
A large proportion of house buyers in St Andrews are those already living in north-east Fife. A significant share of the house buyers have relocated from other parts of Scotland and beyond. Again this may be connected with the University, for example, academic staff and researchers moving into the area etc.

Average House Prices and Number of House Sales



Source: Sasines

Origin of St Andrews House Buyers, 2000-2006



Source: Sasines

Current & Future Developments

Proposed developments for East Fife are outlined in the finalised draft St Andrews & Fife Local Plan*. The Local Plan covers a 10-year period (2006-2016). It will be reviewed every five years. The main areas of proposed development for St Andrews include:

- A 10 ha Science Park in the New University Quarter,
- 5 ha employment land at Largo Road
- A 5 ha business Park at Craigtoun Road
- Land for business and office use

The Local Plan also highlights:

- High demand for housing and rising house prices,
- Limited availability of business land.

St Andrews World Class

Pioneered by a group of local businesses, and through collaboration with public agencies, the St Andrews World Class Initiative was implemented in 2003. The overarching objective of the Initiative is working collectively towards common goals and sharing resources to enhance aspects of St Andrews, making the town an even better place for living, working and visiting.

At present the Initiative's three main areas of activity include upgrading the physical environment, developing skills and developing products for market. The main physical projects being progressed at the present time are the upgrading of town centre streetscapes and improvements to traffic management and parking at West Sands. The Initiative is also developing projects to address staff recruitment and retention problems as well as encouraging collaborative working between visitor attractions, restaurants and accommodation providers.

Tourism

- St Andrews Old Course Hotel, Golf Resort and Spa is currently undertaking a £12 million refurbishment of the hotel complex and Duke's Golf Course. The Duke's Course has planning permission to convert the existing cottages, steadings, and mansion housed into fractional ownership.
- St Andrews Links Trust's new, seventh, golf course 'The Castle Course' is due to open in 2008.
- Rufflets House Hotel is extending its banqueting and conference facilities.
- C and L Leisure Ltd have received planning permission to convert Grange House into a 16-bedroomed hotel and ten timeshare units.
- Hamilton Hall is being converted into St Andrews Grand, an exclusive golf and sporting club, with 23 luxury holiday apartments. Work will be completed in mid-2008.



* The St Andrews & East Fife Local Plan will progress towards being adopted (target date 2009) after the Fife Structure Plan is approved by the Scottish Executive.

Comments on this publication are welcome
and should be directed to Margaret Galbraith,
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