



CROWN ESTATE SCOTLAND

TENANT AND STAKEHOLDER RESEARCH SUMMARY OF KEY FINDINGS

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Crown Estate Scotland

Tenant and Stakeholder Research

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1. BACKGROUND AND RESEARCH METHOD

1.1 Introduction

This report summarises the findings to emerge from tenant and stakeholder research carried out by Research Resource on behalf of Crown Estate Scotland.

1.2 Background and Objectives

Crown Estate Scotland was established on 1st April 2017 as a separate Scottish entity from 'The Crown Estate', which manages the estate across the UK, and has done for a significant number of years.

As a new entity, Crown Estate Scotland wishes to establish a baseline of both customer and stakeholder perception and satisfaction in order that they can demonstrate continual improvement and also position the business as outward looking and customer focused.

It was set against this background that Research Resource were commissioned to carry out surveys of Crown Estate tenants and representatives of organisations that Crown Estate Scotland considers to be key stakeholders.

1.3 Objectives

Tenant insight and feedback is vital in ensuring Crown Estate Scotland operates successfully. The objectives of the tenant survey were to help ensure that Crown Estate:

- are aware of critical issues impacting tenants, be it strategic issues related to their operating environment or more practical matters;
- consolidate their reputation as a responsible land manager;
- can respond, where appropriate, to issues raised relating to how they do business and how they communicate with tenants and stakeholders;
- establish a baseline for subsequent monitoring, evaluation and reporting.

For stakeholders, the objectives of the research were to:

- gather evidence of how stakeholders perceive CES in terms of awareness of what is done, effectiveness, local engagement, communications, how well CES deliver / support industries / sectors;
- enable CES to establish a baseline and to develop indicators for tracking shifts in perceptions;
- provide meaningful, relevant feedback that enables CES to identify potential changes / improvements to what is done and how CES do it.

The outcomes of the surveys will enable Crown Estate Scotland to establish:

- a baseline for subsequent targets and continual improvement; and
- customer service principles.

1.4 Research Method

Tenant Research

A series of survey questionnaires were agreed which fully met the information needs and requirements of Crown Estate Scotland with respect to each customer group. These are available in Appendix 1 of this report and were as follows:

- Coastal tenant survey
- Rural tenant survey
- Shellfish tenant survey
- Finfish tenant survey.

In the rural survey we covered agricultural and residential tenants only. Salmon fishing and minerals will be covered in 2018/19 along with urban and Energy & Infrastructure. For coastal, all tenants were covered.

The survey was undertaken utilising a mixed research methodology. All tenants were sent a postal survey for completion and return to Research Resource Scotland directly. This also provided a link to an online survey which would allow tenants to complete the survey online if preferred. Surveys were mailed out with a covering letter and a pre-paid return envelope to all tenants.

Finally, for Coastal and Shellfish tenants, a telephone survey was undertaken to increase the response rate and ensure a representative response was achieved.

Surveys took place during October and November 2017.

A total of 467 survey completions were achieved with Crown Estate Scotland tenants, representing a response rate of 30% from an overall customer base of 1,553. This is a positive response, with responses of 20% commonly achieved for postal surveys.

The table below shows the number of achieved interviews, number of tenants and response rate by customer grouping.

	Population	No of interviews achieved	Response rate	Data Accuracy (+/-)
Coastal	1158	351	30%	4%
Rural	243	83	34%	9%
Shellfish	134	28	21%	N/A
Finfish	18	5	28%	N/A
Total	1553	467	30%	4%

Stakeholder Research

The stakeholder research was undertaken utilising a telephone depth interview research methodology. Crown Estate Scotland identified a database of 60 stakeholders from whom a total of 40 interviews were targeted. All identified stakeholders were informed by Crown Estate Scotland that Research Resource had been commissioned to carry out this research on their behalf and requesting their co-operation if contacted by Research Resource.

Potential participants were generally Chief Executive or Director level within identified organisations therefore appointments were set to hold the discussion, as was suitable in their diary. Interviews took place between November 2017 and January 2018.

A total of 40 in depth interviews were carried out with key stakeholders. These have been classified by their area of relevance to Crown Estate Scotland for analysis purposes. The 40 depth interviews have been classified as follows:

Type of Stakeholder	Number of interviews
Rural	10
Coastal	6
Aquaculture	4
Local Authority	8
Corporate (relevant across the business)	6
Energy & Infrastructure	6
Total	40

The stakeholder research was designed to be largely qualitative with open ended questions asked of all stakeholder. The aim of this type of research is to achieve a detailed understanding of stakeholder views and expectations as opposed to carrying out statistical analysis. However, in addition, a small number of quantitative questions were asked to set a baseline understanding of stakeholder views.

2. SUMMARY OF TENANT RESEARCH KEY FINDINGS

2.1 Awareness and perceptions

The vast majority of tenants stated that prior to the survey, they were **aware** of Crown Estate Scotland. This ranged from 99% of rural tenants and 99.7% of coastal tenants to all shellfish and finfish tenants.

In terms of their level of **knowledge**, the majority in all sectors stated that they were quite knowledgeable about Crown Estate Scotland, with the exception of coastal tenants where the greatest proportion were 'aware but not very knowledgeable' about Crown Estate Scotland.

All tenants who responded were then asked how they would **rate Crown Estate Scotland** with respect to a variety of aspects on a scale of 1 to 10 where 1 was very poor and 10 was excellent. In analysing this data, to allow accessibility, we have calculated the 'mean' or average rating. The mean rating is valuable as it allows us to summarise a large volume of data succinctly and takes account of the variance of the data. The results achieved for each sector are summarised in the table below. The range of responses received and the most common response are available in the full survey report.

This shows that the rural sector were generally slightly less positive about Crown Estate Scotland than other sectors. Shellfish tenants were most positive.

		Coastal	Rural	Finfish	Shellfish
How would you rate Crown Estate Scotland with respect to the following?	Clarity and openness	6.9	6.4	7.2	7.7
	Understanding your needs	6.6	6.1	7.2	7.5
	Quality of communication	7.0	6.4	7.2	7.9
	Efficiency	6.9	6.1	6.6	7.7
	Responsiveness	7.1	5.9	6.8	7.9
	Professionalism	7.6	6.6	8.2	8.4
	Overall performance	7.1	6.3	7.2	8.2
Recommendation	How would you speak about Crown Estate Scotland to others?	6.7	6.8	6.8	7.9

2.2 Contact and communication

Tenants generally perceived the information as easy to understand and rated the website positively, but were slightly less positive in terms of the usefulness of information. Often comments made with regard to this reflected that the information was very general and not necessarily specific to their own circumstances.

		Coastal	Rural	Finfish	Shellfish
Information	Thinking of the information you receive directly from Crown Estate Scotland, how useful is it?	6.5	6.3	6.4	7.4
	And again, thinking of the information you receive directly from Crown Estate Scotland, how easy to understand is it?	7.7	7.2	6.4	7.8
	How would you rate the website?	7.0	7.2	8.0	7.0

2.3 Rent payment and value for money

Moving onto the theme of rent payment and value for money, all tenants were most positive with regard to the ease of rent payment arrangements, with a minimum mean score of 7.6 from coastal tenants and a maximum of 8.2 for shellfish tenants.

They were consistently less positive in terms of understanding how rents are set and value for money. Coastal tenants were least positive in terms of the understanding of how rents are set and finfish tenants in terms of value for money.

		Coastal	Rural	Finfish	Shellfish
Rent and value for money	Understanding of how rents are set	5.4	6.1	7.2	6.6
	Ease of rent payment arrangements	7.6	7.9	7.8	8.2
	Value for money	5.8	6.4	5.0	7.3

2.4 Overall service

Overall satisfaction with the service provided by Crown Estate Scotland was relatively positively rated, with a minimum mean rating of 6.6 given by finfish tenants and 7.7 for shellfish tenants.

		Coastal	Rural	Finfish	Shellfish
Overall service	Overall, how satisfied or dissatisfied are you with the service provided by Crown Estates Scotland?	6.8	6.7	6.6	7.7

2.5 Managing agents

Coastal and rural tenants were asked about the managing agents who work on behalf of Crown Estate Scotland. Over two thirds of coastal respondents (70%) and 93% of rural respondents deal with one of the firms of agents who work on behalf of Crown Estate Scotland.

These tenants were asked to rate the agents with respect to a variety of aspects of the service provided. As shown below, there is a difference in the rating of managing agents, with coastal respondents being significantly more positive than rural tenants, most notably with regard to responsiveness where the mean rating for rural was 5.3 and for coastal 6.9.

		Coastal	Rural
Managing agents	Clarity and openness	7.0	5.7
	Understanding your needs	6.7	5.7
	Communication	7.0	5.8
	Responsiveness	6.9	5.3
	Efficiency	6.9	6.5
	Professionalism	7.4	6.5
	Overall tenant service	6.9	5.8

2.6 Support for Aquaculture

Shellfish and Finfish tenants were asked their perception of how helpful Crown Estate Scotland activities are for them and the sector. Both tenant groups were relatively similar in rating of the independent five yearly rent reviews, participation in policy forums and the lease term of 25 years.

However, it is interesting to note that when it comes to sector specific activities, there is a difference in opinion with shellfish tenants finding Crown Estate Scotland's sponsorship of the Association of Scottish Shellfish Growers and encouragement of finfish tenants to use their inactive sites significantly more helpful than finfish tenants.

		Finfish	Shellfish
To what extent are the following Crown Estate Activities helpful to you and the sector?	Independent five-yearly rent reviews	6.6	7.3
	Our participation in policy forums	7.0	7.1
	Our support for R&D e.g. Scottish Aquaculture Research Forum activities	6.4	7.6
	Our provision of standardised spatial coordinates for new leases	6.4	7.5
	Lease term of 25 years	8.0	8.2
	Sponsorship of Association of Scottish Shellfish Growers	3.3	8.3
	Encouraging finfish tenants to use their inactive sites	5.0	8.3

2.7 Future of Crown Estate Scotland

The final section of the questionnaire asked tenants to consider their general views of Crown Estate Scotland and priorities for the future.

Firstly, when asked if the level of service they receive has changed since Crown Estate Scotland was established in April 2017, the vast majority of respondents stated that it has stayed the same in all sectors, ranging from 76% in shellfish to 87% in rural.

In terms of Crown Estate Scotland's priorities over the next few years in order to improve the service to tenants, the themes across sectors were relatively similar, focusing on:

- Improving communications
- Reducing costs/ fees
- Value for money
- Providing a quicker service
- Giving tenants a clearer understanding of what is done and future plans

3. SUMMARY OF STAKEHOLDER RESEARCH KEY FINDINGS

3.1 Awareness and perceptions

General awareness of Crown Estate Scotland was high, with all stakeholders interviewed aware of Crown Estate Scotland and 37 out of 40 aware it is an interim arrangement.

In terms of Crown Estate Scotland operations, more than half of stakeholders (56%) see Crown Estate Scotland operating in the same way as The Crown Estate, 44% see it operating differently. The key ways in which they see this happening are:

- More accessibility/ engagement/ responsiveness (6 comments)
- More of a Scottish focus (5)
- More aligned to Scottish Government policy (2)
- Devolution of assets to local communities/ Councils (2).

3.2 Expectations of Crown Estate Scotland in this interim period

Expectations of Crown Estate Scotland from almost half of stakeholders interviewed are to continue or maintain doing what is currently being done. Those who stated that they had different expectations noted that they would like to see Crown Estate Scotland being:

- More open and transparent
- More accessible and approachable
- Being proactive with stakeholder, listening and engaging with them
- Being more strategic in their focus

In terms of what should be done differently, the key responses were:

- Nothing (12 responses)
- Closer working relationships (10)
- Explore new ways of working (6)
- Allow more local management (4)
- Investing revenue raised (3)

3.3 Rating of Crown Estate Scotland

When asked to rate Crown Estate Scotland on a range of factors on a scale of 1 to 10 where 1 was very poor and 10 was excellent, stakeholders were most positive with respect to:

- Trustworthiness (mean rating of 8.2)
- Staff expertise (8.2)
- Professionalism (8.1)

Ratings were slightly lower with regard to:

- Quality of communication (6.8)
- Responsiveness (6.8)
- Understanding your needs (6.7)

However, ratings were not particularly negative with respect to there, rather a number of stakeholders gave a mid-point rating of '5' and noted it was too early to say.

3.4 Engagement with stakeholders

70% of stakeholders stated that they believed the methods of engagement that Crown Estate Scotland use are satisfactory. Where this was not believed to be the case, this was due to limited engagement. Recommendations for improvement of engagement were to increase the frequency, be more proactive or humanise/ more one to one engagement.

3.5 Crown Estate Scotland Values

The values of Crown Estate Scotland were largely seen to be demonstrable by stakeholders. Stakeholders were asked to rate the extent to which they believe the organisation demonstrates its values on a scale of 1 to 10 where 1 was not at all and 10 was completely. The mean ratings were as follows:

- Commercialism (7.9)
- Integrity (7.7)
- Excellence (7.3)
- Collaboration (6.5)

3.6 Overall satisfaction

Overall satisfaction with Crown Estate Scotland, on a scale of 1 to 10 where 1 was very dissatisfied and 10 was very satisfied received a mean rating of 7.2, with the most common rating being 8.

3.7 Key strengths

Key strengths of Crown Estate Scotland were noted as being:

- Stability
- Personnel
- Experience and Expertise
- Board
- Professionalism
- Asset base
- The opportunity afforded to the organisation through its creation.

3.8 Suggestions for improvement

Suggestions for improvement were very much focused on the role and remit of the stakeholder who was consulted and included:

- Increasing public knowledge of Crown Estate Scotland
- Explain how sustainability will be delivered
- Proactively engage stakeholders
- Consider the sub surface and offshore assets more
- Act more in the interest of the general public/ community
- Invest in more local developments
- Look at integrated land management more holistically
- Focus on collaboration with 1 or 2 local authorities.