



## CROWN ESTATE SCOTLAND

# COASTAL CUSTOMER SATISFACTION RESEARCH 2019

## Executive Summary

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Date: 6<sup>th</sup> February 2020

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Date: 6<sup>th</sup> February 2020

## 1. BACKGROUND AND METHODOLOGY

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### 1.1. Introduction

This report summarises the key findings to emerge from tenant 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'. Crown Estate Scotland now manages the estate on behalf of Scottish Ministers, including agricultural and forestry land, most of the seabed, around half of the foreshore and some commercial property. In managing these assets, Crown Estate Scotland aims to ensure that the assets are enjoyed and developed sustainably to deliver benefits to communities and the nation, with revenue profit going to the Scottish Government.

As a new entity, Crown Estate Scotland established a baseline of coastal tenant perception and satisfaction in 2017 in order to allow for continual improvement and position the business as outward looking and customer focused. This latest tenant survey was carried out in order to measure progress against this baseline and gain an up to date picture of tenant views.

The objectives of the survey were to help ensure that Crown Estate Scotland:

- is aware of critical issues impacting tenants, be it strategic issues related to their operating environment or more practical matters;
- consolidate its reputation as a responsible land manager;
- can respond, where appropriate, to issues raised relating to how it does business and how it communicates with tenants and stakeholders;
- can compare the survey with the baseline position established in 2017 in order to allow for monitoring and evaluation of progress.

### 1.3. Research Method

A survey questionnaire was agreed which met the information needs and requirements of Crown Estate Scotland with respect to the coastal tenant group.

The survey was undertaken using a postal research methodology during October and November 2019. All tenants were sent a postal survey for completion and returned to Research Resource Scotland directly. Surveys were posted with a covering letter and a pre-paid return envelope to all tenants.

A total of 285 survey completions was achieved, representing a response rate of 21% from an overall customer base of 1,342.

A total of 285 interviews provides data accurate to +/-5% (based upon a 50% estimate at the 95% level of confidence).

Please note that in relation to all responses outlined below, 10 is the most positive rating with 1 being the least.

## 2. SUMMARY OF KEY FINDINGS

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### 2.1. Awareness and perceptions

The vast majority of coastal tenants (98.9%) stated that, prior to the survey, they were **aware** of Crown Estate Scotland.

Tenants were asked how they would **rate Crown Estate Scotland** with respect to a variety of aspects. The mean rating was calculated and comparison to 2017 shows an improving picture of perceptions of Crown Estate Scotland:

- Efficiency – 7.5 (up from 6.9)
- Overall performance – 7.4 (up from 7.1)
- Responsiveness – 7.4 (up from 7.1)
- Quality of communication – 7.3 (up from 7)
- Clarity and openness – 7.3 (up from 6.9)
- Understanding your needs – 6.9 (up from 6.6)

The most common response given for all aspects was a very positive rating of '8'. Those rating Crown Estate Scotland as a 7 or above for **efficiency** has increased by 13% from the 2017 survey.

When asked how they would **speak about Crown Estate Scotland to others** a mean rating of 7.0 was given, this has increased from 2017 when the mean rating was 6.7.

In terms of their level of **knowledge**, 57% were aware but not very knowledgeable about Crown Estate Scotland and 31% stated that they were quite knowledgeable about Crown Estate Scotland. This has changed in comparison to 2017 when 44% were not very knowledgeable and 39% stated that they were quite knowledgeable about Crown Estate Scotland.

### 2.2. Overall service

**Overall satisfaction** with the service provided by Crown Estate Scotland received a mean rating of 7.0, an increase compared to 2017 when the mean rating was 6.8.

### 2.3. Contact and communication

Respondents were more positive in terms of the **usefulness of information** received directly from Crown Estate Scotland than was the case in 2017, with a mean rating of 6.7 received in 2019 compared to 5.6 in 2017.

Respondents were asked to consider how **easy** the information they receive directly from Crown Estate Scotland is **to understand**. The mean rating for this was 7.7, which is consistent with the mean rating in 2017.

When asked what the **key things** that respondents **would like to hear about** from Crown Estate Scotland were, the most common answers were:

- Changes that affect us directly/ more local/ specific information to us (n=39)
- Future coastal developments/ environmental planning/ protecting the environment (n=23)
- Operational Crown Estate Scotland plans/ priorities (n=21)
- Breakdown of how revenue is spent (n=13)
- How can Crown Estate Scotland help us (n=10).

Just over half of coastal tenants would like Crown Estate Scotland to **communicate** with them by email (56%), and 55% stated that they would like Crown Estate Scotland to communicate with them by letter. Compared to 2017, the proportion who would like to be communicated with by letter has increased and email has decreased.

The majority of respondents (86%) felt that the **frequency of contact** that they have with Crown Estate Scotland was appropriate and met their needs. This is a slight decrease compared to 2017 when 88% stated that the contact they have was appropriate and meets their needs.

### 2.4. Rent payment and value for money

Moving onto the theme of rent payment and value for money, coastal tenants were most positive with regard to the **ease of rent payment** arrangements, with a mean score of 7.6 (down marginally from 8 in 2017). They were least positive about their **understanding of how their rents are set**, with a mean score of 5.4, although this is up marginally from 5.3 in 2017. Perceptions of **value for money** have increased slightly since 2017 rising from a mean rating of 5.8 to 6.

## 2.5. Managing agents

Almost nine in ten respondents (89%) deal with Bidwells who work on behalf of Crown Estate Scotland as its **managing agent**. Tenants were asked to rate the agents with respect to a variety of aspects of the service provided. Ratings of the managing agent have increased since 2017 and were most positive with respect to:

- Professionalism (8.1, rising from 7.4)
- Clarity and openness (7.8, rising from 7.0)
- Communication (7.7, rising from 7.0)
- Responsiveness/ efficiency (7.7, rising from 6.9).

## 2.6. Mooring tenants

Mooring tenants were asked a series of questions about mooring licences. Respondents were largely supportive of the **mooring licensing scheme**, with a mean rating of 8.1 (up from 7.2 in 2017).

Thinking about satisfaction levels with the **process of applying for a mooring licence**, mean ratings of between 7.4 for the amount of information available at the time of application to 7.8 for how any subsequent dealings were handled, were recorded. Mean satisfaction ratings have risen compared to 2017 where mean ratings ranged from 7.1 and 7.4 respectively.

Just over half of respondents (56%) stated that they believed that commercial moorings should be **charged** at a different rate as private individual moorings. This is greater than the 47% who said they should be charged at a different rate in 2017.

Mooring tenants were asked about the **unique marker tags** used to identify licensed moorings and if they had any suggestions on how they could be improved. The most common suggestions were:

- Current tags are fine (20 comments)
- Floating tags/ buoys (10 comments)
- Digital tag/ more advanced system (8 comments)
- Only provide tag after payment is made/ refresh annually/ change colour annually (8 comments)
- Clear name/ description (7 comments).

## 2.7. Future of Crown Estate Scotland

When asked about their perceived change in the level of service received from Crown Estate Scotland, the vast majority of respondents (86%) stated that the level of **service** they receive has stayed the same since Crown Estate Scotland was established in April 2017. 12% stated it has improved and 3% stated that it has worsened.

Respondents were asked what they thought Crown Estate Scotland's **priorities** should be over the next few years in order to **improve the service** to tenants. The most commonly noted priorities were:

- Keep tenants informed/ more frequent communication (15 comments)
- Work with/ support/ provide grants to local communities (13 comments)
- No change/ keep up the good work (12 comments)
- Reduce/ do not increase rents (10 comments)
- Get to know tenants better/ deliver to specific/ local requirements (10 comments)

Tenant priorities for **gaps in existing support** provided by Crown Estate Scotland for coastal communities, that they felt should be addressed, were noted as:

- Support local communities e.g. advice/ financial assistance/ grants (14 comments)
- Information on what support is available (8 comments)
- Environmental projects (6 comments)
- Investment in developments/ infrastructure (5 comments)

Finally, respondents were told that one of Crown Estate Scotland **priorities for 2020-23** is supporting the expansion of Scotland's blue economy, focussing on marine and coastal development. Respondents were asked what they thought Crown Estate Scotland's priorities should be for the coastline, with the most common responses being:

- Protection of the coastline/ marine life/ environment (52 comments)
- Managing/ reducing fish and salmon farming (13 comments)
- Sustainable development (11 comments)
- Supporting small business (6 comments)