



CROWN ESTATE SCOTLAND

TENANT SATISFACTION RESEARCH

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Crown Estate Scotland

Tenant Research

Contents

1.	BACKGROUND AND RESEARCH METHOD.....	3
1.1.	Introduction.....	3
1.2.	Background and Objectives.....	3
1.3.	Objectives.....	3
1.4.	Research Method.....	4
2.	SUMMARY OF KEY FINDINGS.....	6
2.1.	Awareness and perceptions.....	Error! Bookmark not defined.
2.2.	Contact and communication.....	6
2.3.	Rent payment and value for money.....	8
2.4.	Overall service.....	9
2.5.	Managing agents.....	Error! Bookmark not defined.
2.6.	Support for Aquaculture.....	Error! Bookmark not defined.
2.7.	Future of Crown Estate Scotland.....	Error! Bookmark not defined.

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1. BACKGROUND AND RESEARCH METHOD

1.1. Introduction

This report summarises the 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', which manages the estate in other parts of the UK.

Crown Estate Scotland manages assets 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 lasting value, with revenue profit going to the Scottish Government.

As a new entity, Crown Estate Scotland wishes to establish a baseline of customer perception and satisfaction in order to allow for continual improvement and position the business as outward looking and customer focused.

It was set against this background that Research Resource were commissioned to carry out a survey of Crown Estate Scotland tenants. One cohort was done in 2017/8 and one in 2018/9. This summary refers to the latter.

1.3. Objectives

Tenant insight and feedback is vital in ensuring Crown Estate Scotland operates successfully. The objectives of the 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.

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

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

1.4. Research Method

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 were as follows:

Energy and Infrastructure

- Cables and pipelines
- Offshore Wind
- Wave and tidal

Rural

- Rural Commercial
- Salmon Fishing
- Mines Royal.

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, a total of 50 telephone interviews were undertaken in order to increase the response rate and ensure a representative response was achieved.

Introductory text in the questionnaire made clear that the research was related to business operations and customer service, and not the upcoming legislative changes to the long-term arrangements for managing Crown Estate Scotland assets.

Surveys took place during November and December 2018, with telephone interviews carried out in January 2019.

Pre-publicity to encourage take-up was undertaken by Crown Estate Scotland including social media, e-newsletter, targeted media relations (e.g. Scottish Farmer), website, and word-of-mouth (via managing agents and asset managers).

1.5. Sample Size

A total of 120 survey completions were achieved with Crown Estate Scotland tenants, representing a response rate of 37% from an overall customer base of 325. 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.

	No of companies	No of responses	Response rate
Cables and Pipelines	30	12	40%
Offshore wind	12	3	25%
Wave and tidal	9	6	67%
Rural Commercial	141	30	21%
Salmon fishing	128	67	52%
Mines Royal	5	2	40%
Total	325	120	37%

2. SUMMARY OF KEY FINDINGS

2.1. Knowledge of Crown Estate Scotland

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

		Cables and Pipelines	Offshore wind	Wave and Tidal	Rural Commercial	Salmon fishing	Mines Royal
Knowledge	Very knowledgeable	17%	67%	17%	7%	3%	-
	Quite knowledgeable	33%	33%	50%	37%	32%	50%
	Aware but not knowledgeable	50%	-	33%	53%	52%	50%
	Have little/ no knowledge	-	-	-	3%	14%	-

2.2. Contact and communication

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.

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.

TENANT RESEARCH

		Cables and Pipelines	Offshore wind	Wave and Tidal	Rural Commercial	Salmon fishing	Mines Royal
Information	Thinking of the information you receive directly from Crown Estate Scotland, how useful is it?	6	8	8.2	5.8	5.6	3
	And again, thinking of the information you receive directly from Crown Estate Scotland, how easy to understand is it?	8	9	8.4	8.2	7.1	8
	How would you rate the website?	7.2	6.5	7	7.4	7.3	7

2.3. Communications with Crown Estate Scotland/ Managing Agents

Moving onto direct contact and communication in relation to transactions or dealings, respondents who were Cables and Pipelines, Offshore Wind or Wave and Tidal were asked to think about their most recent transaction or dealing with Crown Estate Scotland and rate this on a scale of 1 to 10 where 1 was very poor and 10 was excellent. Respondents were generally positive about their dealings with Crown Estate Scotland, in particular Offshore Wind tenants were most positive.

		Cables and Pipelines	Offshore wind	Wave and Tidal	Rural Commercial	Salmon fishing	Mines Royal
Thinking about your most recent transaction/ dealing with CES, how would you rate them with respect to the following?	Clarity	7.2	7.7	7.2			
	Understanding your needs	7.2	8.7	7			
	Frequency of communication	6.7	9.3	7.7			
	Quality of communication	7.3	9.3	7.4			
	Efficiency	6.6	9.7	8.4			
	Responsiveness	6.4	9.7	8.2			
	Legal input	7.6	9.7	8.2			
	Overall performance	6.6	7	6.7			

Rural commercial, salmon fishing and mines royal tenants were asked about the contact they have with the managing agents who work on behalf of Crown Estate Scotland.

TENANT RESEARCH

These tenants were asked to rate the agents with respect to a variety of aspects of the service provided. As shown below, Salmon Fishing respondents were more likely to be positive about their dealings with managing agents than Rural Commercial and Mines Royal tenants.

		Cables and Pipelines	Offshore wind	Wave and Tidal	Rural Commercial	Salmon fishing	Mines Royal
Managing agents	Clarity and openness				5.6	7.2	5.5
	Understanding your needs				5.3	6.6	5.5
	Communication				5.7	6.8	5
	Responsiveness				5.5	6.8	5
	Efficiency				5.2	7.1	3
	Professionalism				6.4	7.4	6.5
	Overall tenant service				5.8	6.6	5.5

2.4. 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 6.7 from Offshore Wind tenants and a maximum of 8.7 for Wave and Tidal tenants.

		Cables and Pipelines	Offshore wind	Wave and Tidal	Rural Commercial	Salmon fishing	Mines Royal
Rent and value for money	Understanding of how rents are set	6.3	8	7.2	5.8	4.4	5
	Ease of rent payment arrangements	8.1	6.7	8.7	7.5	7.5	8.5
	Value for money				6.1	4.3	5.5

2.5. Overall service

Overall satisfaction with the service provided by Crown Estate Scotland was relatively positively rated, with a minimum mean rating of 5.7 given by Salmon fishing tenants and 9 for Offshore Wind tenants.

		Cables and Pipelines	Offshore wind	Wave and Tidal	Rural Commercial	Salmon fishing	Mines Royal
Overall service	Overall, how satisfied or dissatisfied are you with the service provided by Crown Estates Scotland?	6.9	9	7.8	7.1	5.7	7
Recommendation	How would you speak about Crown Estate Scotland to others?	6.7	8.7	7.5	6.5	5.6	5.5
Change in service	Better	9%	50%	60%	13%	11%	100%
	Same	82%	50%	40%	88%	73%	-
	Worse	9%	-	-	-	16%	-