



Summary Report

2023 Aquaculture Tenants Survey

Prepared for:

Crown Estate Scotland

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1. Introduction

This report highlights the key findings to emerge from a survey of Crown Estate Scotland Aquaculture tenants.

This report presents and discusses the findings from a programme of quantitative research with key customer groups including Shellfish, Finfish and Seaweed tenants who have an ongoing relationship with Crown Estate Scotland. The 2023 Aquaculture tenants survey included Seaweed tenants for the first time.

The research was carried out to source insights on tenants' perceptions of Crown Estate Scotland as an organisation, identifying current strengths, critical issues impacting relationships and opportunities for improvement.

The report highlights a number of comparisons with previous research conducted with Shellfish and Finfish tenants in 2017, highlighting any changes in tenant attitudes and experiences since the baseline survey and adding to a growing body of research and insights gathered by the organisation.

2. Background and Methodology

2.1 Project Background

The programme of research was designed to demonstrate that Crown Estate Scotland is an outward looking and customer focused organisation, and to provide the organisation's Board with insights on how the organisation is perceived, what it is doing well and where changes may be required.

At the time of conducting this most recent tenant research, Crown Estate Scotland had recently reached their fifth anniversary as a devolved organisation. It is against this backdrop that the research has been undertaken, to establish progress, and to provide key insights that would support the organisation's long-term planning and customer experience.

2.2 Research Objectives

The principal aims and objectives of the research programme were to provide insights on the perceptions and experiences of Aquaculture tenants that would:

- ensure Crown Estate Scotland is aware of critical issues impacting Aquaculture tenants, be it strategic issues related to their operating environment or more practical matters;
- track Crown Estate Scotland's corporate reputation;

- position Crown Estate Scotland as a listening and responsive organisation;
- effectively support Crown Estate Scotland's long-term planning;
- ensure Crown Estate Scotland can respond, where appropriate, to issues raised relating to how they do business and how they communicate with tenants;
- Identify what Crown Estate Scotland do well and where they can improve
- Monitor performance and identify key trends over time.

The research will enable Crown Estate Scotland to establish progress made and identify opportunities for continual improvement.

2.3 Research Method

A questionnaire was developed based on a set of core questions from the previous waves of research, which included:

- A survey of Shellfish tenants in 2017
- A survey of Finfish tenants in 2017.

The survey was designed to fully meet the information requirements of Crown Estate Scotland and to assess any shifts in perceptions, attitudes, or experiences since the previous research.

The questionnaire focused on business operations, customer service and reputation management. The research was undertaken using CATI (computer assisted telephone interviewing), with the survey being conducted in May 2023.

2.4 Sample Design

All Aquaculture tenants of Crown Estate Scotland were invited to participate in the research, with Crown Estate Scotland supplying a database of tenant contact details.

A total of 60 survey completions were achieved with Crown Estate Scotland tenants, representing an overall response rate of 60% from a customer base of 100 tenants.

The table below shows the number of achieved interviews and response rate from each of the property tenant customer groups.

Target Client Group	Sample Size	No. of completes	Response rate
Shellfish tenants	63	35	55%
Finfish tenants	20	15	75%
Seaweed tenants	15	10	66%

The sample size is reflective of the number of tenant contacts approached rather than the number of tenants. Some tenants have multiple contacts meaning more than one respondent may have responded to the survey from that tenancy.

2.5 Analysis

The core questions in the survey questionnaire asks the respondent to rate their views on a scale of 1 – 10, where 10 was the highest level of positive sentiment and one was the lowest. From this a 5-point agreement score can be derived, as follows:

10-point scale	5 – Point Scale
9 – 10	Very Satisfied
7 – 8	Fairly Satisfied
5 - 6	Neither Satisfied nor Dissatisfied
3 – 4	Fairly Dissatisfied
1 - 2	Very Dissatisfied

The five-point Likert scale outlined above is the market research industry standard.

We present the data illustrating the percentage of respondents who have expressed a positive sentiment of 7 or more. (i.e. fairly or very satisfied).

It should be noted that it was decided to postpone the planned research with Aquaculture tenants in 2020 as Crown Estate Scotland were conducting a root and branch review of Aqua leasing over the same timeframe. Therefore, we have provided comparison data against the baseline data conducted in 2017 for both Shellfish and Finfish tenants.

This was the first-time seaweed tenants were included in the aquaculture tenants survey as a separate group, therefore no comparison data is available.

3. Key Findings

The survey questionnaire covered the following themes:

- Awareness and Perceptions
- Service and Communication
- Contact and Communications
- Rent and Value for Money
- Overall Satisfaction

3.1 Awareness and Perceptions

Respondents were initially asked about **how knowledgeable they felt they were about Crown Estate Scotland**.

	Shellfish tenants	Finfish tenants	Seaweed tenants
Very Knowledgeable	6%	13%	0
Quite Knowledgeable	74%	60%	80%

It can be seen that a higher proportion of Finfish tenants indicated that they were ‘very knowledgeable’ about the organisation.

Levels of knowledge (i.e. those stating very or quite knowledgeable about Crown Estate Scotland) have increased for Shellfish tenants from 63% in 2017 to 80%. Knowledge has also increased amongst Finfish tenants with an uplift of 13% who stated they were very knowledgeable since 2017.

3.2 Service and Communication

Respondents were asked to **rate Crown Estate Scotland across a range of brand metrics** on a scale of 1-10, where 10 was excellent and 1 was poor. The table showcases positive sentiment with a rating of 7 or more.

	Shellfish tenants	Finfish tenants	Seaweed tenants
Clarity and Openness	83%	94%	100%
Understanding your needs	82%	93%	90%
Quality of Communication	83%	100%	100%
Efficiency	86%	100%	100%
Responsiveness	86%	100%	100%

Professionalism	89%	100%	100%
Overall Performance	88%	100%	90%

Positive sentiment was high across all brand metrics measured. The metric that scored the highest for Shellfish tenants is 'Professionalism' (89%), which scored 100% for Finfish and Seaweed tenants. Shellfish tenants had slightly lower sentiment on brand metrics than finfish and seaweed tenants.

Finfish tenants expressed higher scores in 2023 for efficiency, responsiveness and overall performance and quality of communication compared to the baseline survey in 2017. In contrast, Shellfish tenants had less positive sentiment across the seven brand metrics in 2023 compared with 2017.

Respondents were then asked **how they would speak about Crown Estate Scotland to others** on a scale of 1-10, where 10 was excellent and 1 was poor. The table showcases positive sentiment with a rating of 7 or more.

It can be seen that advocacy for Crown Estate Scotland is high across the three groups of aquaculture tenants.

I would speak positively about Crown Estate Scotland	Shellfish tenants	Finfish tenants	Seaweed tenants
Positive sentiment with a rating of 7 or more.	91%	100%	100%

Finfish tenants expressed the highest positive sentiment score in 2023, with a mean of 8.1 compared to a mean score of 6.8 in the 2017 baseline survey, indicating a notable improvement.

3.3 Contact and Communication

Respondents were asked to **rate Crown Estate Scotland communications** on a scale of 1-10, where 10 was excellent and 1 was poor. The table showcases positive sentiment with a rating of 7 or more.

	Shellfish tenants	Finfish tenants	Seaweed tenants
Usefulness of Information	84%	100%	100%
Easy to Understand	94%	100%	100%

Attitudes towards communications from Crown Estate Scotland are very positive, particularly with regard to being easy to understand.

Positive sentiment amongst Finfish tenants has increased with regard to usefulness of information with the mean score increasing from 6.4 in 2017 to 8.1 in 2023, indicating a notable improvement. A similar finding emerged with regard to information being easy to understand with the mean score amongst finfish tenants rising from 6.4 in 2017 to 8.3 in 2023, indicating a notable improvement since the baseline survey.

Respondents were subsequently asked about their **preferred method of communication**.

Preferred Method of Communication	Shellfish tenants	Finfish tenants	Seaweed tenants
Letter	54%	53%	70%
Email	46%	47%	30%
Frequency of contact appropriate	97%	100%	100%

It can be seen that all tenant groups favoured communication by letter over e mail and that a higher proportion of Seaweed tenants prefer communication by letter.

It can also be seen that the vast majority of aquaculture tenants believed the frequency of contact to be appropriate.

3.4 Rent

Respondents were asked their **views on rent payment and value for money**. When asked to rate how satisfied or dissatisfied they were with the following three statements on a scale of 1-10, where 1 was very dissatisfied and 10 was very satisfied. We present the data showcasing the percentage who provided a positive sentiment rating of seven or more.

	Shellfish tenants	Finfish tenants	Seaweed tenants
Understanding of how rents are set	100%	100%	100%
Ease of rent payment arrangements	100%	100%	100%

Positive sentiment was universally high amongst aquaculture tenants with regard to understanding how rents are set and ease of payment arrangements.

There has been a notable improvement amongst both Shellfish tenants and Finfish tenants with regard to understanding how rents are set. The mean score for Shellfish tenants has increased from 6.6 in 2017 to 8.1 in 2023. The mean score for Finfish Tenants increased from 7.2 in 2017 to 8.1 in 2023.

3.5 Satisfaction with Crown Estate Scotland Service

Respondents were asked to **rate how satisfied or dissatisfied they were with the service provided by Crown Estate Scotland** on a scale of 1 to 10, where one was very dissatisfied and 10 was very satisfied. We present the scores of those who provided a rating of 7 or more with the service provided by Crown Estate Scotland.

Satisfied with service provided by Crown Estate Scotland	Shellfish tenants	Finfish tenants	Seaweed tenants
Positive sentiment score of 7 or more	92%	100%	90%

Aquaculture tenants expressed high levels of satisfaction with the service provided by Crown Estate Scotland.

Finfish tenants expressed higher levels of satisfaction with the service provided by Crown Estate Scotland with the mean score increasing from 6.6 in the 2017 baseline survey to 7.9 in 2023 survey indicating a notable improvement. The mean score for Shellfish tenants remained unchanged at 7.7 across both surveys.

Respondents were subsequently asked **if the level of service they received from Crown Estate Scotland had changed in the last 2 years.**

Level of service changed in last 2 years	Shellfish tenants	Finfish tenants	Seaweed tenants
Much better	0	0	0
Better	3%	0	0
Same	94%	100%	100%
Worse	3%	0	0
Much Worse	0	0	0

The vast majority of aquaculture tenants expressed the view that the level of service provided by Crown Estate Scotland had remained the same in the last 2 years. However, for shellfish and finfish tenants this indicates that the service improvement reported in the 2017 survey, has been maintained.

4. Conclusions

Results from the 2023 Aquaculture tenants survey indicate that respondents expressed a high level of positive sentiment towards Crown Estate Scotland. Whilst sentiment is high within each of the three sub-groups interviewed (Shellfish, Finfish and Seaweed tenants), positive sentiment amongst shellfish tenants is generally slightly lower and slightly down on the 2017 survey.

Awareness and Perception

Aquaculture tenants currently have high levels of knowledge about Crown Estate Scotland, with 80% of both Seaweed and Shellfish tenants stating they were quite or very knowledgeable. Levels of knowledge amongst Finfish tenants were slightly lower with 73% indicating they were knowledgeable about the organisation.

Service and Communication

With regard to the reputation management of the organisation, positive sentiment was high across the range of brand metrics reviewed. The brand metric that scored the highest across the three aquaculture sub-groups was professionalism.

Shellfish tenants had slightly lower scores across the brand metrics, with understanding tenant needs recording the lowest score of the seven metrics reviewed

Brand advocacy was high across the three aqua tenant sub-groups, with more than 90% of Shellfish tenants and 100% of both Seaweed and Finfish tenants stating they would speak positively about Crown Estate Scotland.

Contact and Communication

Attitudes towards communication are very positive, particularly with regards to frequency of contact, and usefulness of information. Shellfish tenants had the lowest score regarding usefulness of information with 84% expressing positive sentiment in this regard. All tenants expressed a preference for communication by letter with seaweed tenants in particular indicating a preference (70%).

Rent

Positive sentiment was universally high amongst aquaculture tenants with regard to both understanding how rents are set and ease of rent payment arrangements.

Satisfaction with Crown Estate Scotland service

Aquaculture tenants expressed high levels of satisfaction with the service provided by Crown Estate Scotland, with positive sentiment ranging between 90% for Seaweed tenants, 92% for Shellfish Tenants, and 100% for Finfish tenants.

The vast majority of aquaculture tenants expressed the view that the level of service had remained the same in the last two years, maintaining the improvement in service recorded in 2017.

For comparison purposes, the UK Customer Satisfaction Index (UKCSI) is currently 78.4%. The UKCSI measures satisfaction levels across around 300 major organisations, including a dozen of the largest public sector organisations in the UK.