



Summary Report

Property 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 property tenants.

This report presents and discusses the findings from a programme of quantitative research with key customer groups including Coastal, Agricultural, Residential, Fishing and other tenants who have an ongoing relationship with Crown Estate Scotland.

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 tenants since 2017, highlighting any changes in tenant attitudes and experiences and adding to a growing body of research and insights gathered by the organisation.

The 2023 property tenant survey was carried out by Axiom Research & Consultancy.

2. Background and Methodology

2.1 Project Background

The programme of research was designed to assess Crown Estate Scotland's approach as 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 tenant perceptions and experiences that would:

- ensure Crown Estate Scotland is aware of critical issues impacting 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 does well and where it 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 Coastal tenants in 2017 and 2019.
- A survey of Agricultural and Residential tenants in 2017 and 2020
- A survey of Salmon Fishing tenants in 2019.
- A 2019 survey of mines royal and commercial tenants.

The survey questionnaire was consolidated from the previous work undertaken.

This was the first time all property tenants had been invited to participate in a single, collective tenant survey covering all property tenant groups. 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 a mixed methodology. All tenants with known email addresses were invited to participate in an online survey. Tenants without known email addresses were sent a postal survey for completion and return using a pre-paid return envelope. In addition, the postal survey also included a link to the online survey which would allow tenants the opportunity to complete the survey online if preferred.

Finally, a total of 40 telephone interviews with Coastal tenants were undertaken to increase the overall response rate and encourage a similar response rate to the previous 2019 Coastal tenants survey.

The online and postal surveys were conducted from November 2022 through to January 2023, with telephone interviews carried out in March 2023.

It should be noted that it was not always possible to directly compare this current survey with previous surveys due to the tenant groupings for this survey not matching those of previous surveys.

2.4 Sample Design

All property 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 390 survey completions were achieved with Crown Estate Scotland tenants, representing an overall response rate of 20% from a customer base of 1959 tenants. The survey is therefore representative of those who responded rather than the whole tenant base.

The overall response of 390 completed interviews provides a data set with a margin of error of +/- 4.44% calculated at the 95% confidence interval (market research industry standard) and ranges up to +/- 19.9% for the smallest subgroup.

The lower the margin of error, the more confident you can be that your survey reflects the views of all people in the subgroup. The larger the margin of error, the less confidence you should have in how closely the views expressed by the sample represent the views of the target population as a whole.

The range of margins of error across different tenant groups in this report reflects the different numbers of tenants who responded to the survey (see below - Table A1: Survey Response Profile). This should be borne in mind when comparing responses across tenant groups, and in particular in relation to the percentages set out, with some percentages based on notably fewer responses than other tenant groups.

Response rate by survey completion method showed that 56% of those who responded completed an online version of the survey, with 44% returning a self-completion paper-based survey form.

It should be noted that response to the postal survey may have been influenced by ongoing strike disruption by Royal Mail in the run up to the 2022 festive period. A re-run of the postal survey was subsequently conducted in January 2023, to ensure the survey was

sufficiently accessible, providing all tenants with the opportunity to participate in the research.

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

Table A1: Survey Response Profile

Target Client Group	Sample Size	No. of completes	Response rate 2023
Agriculture	169	45	27%
Residential	55	25	45%
Coastal	1552	270	17%
Commercial	7	1	14%
Mines Royal	13	2	15%
Salmon Fishing	108	25	23%
Forth Salmon Fishing	7	6	86%
Estate Fisheries	3	2	66%
Sporting Tenancies	17	7	21%
Recreation sites	9	4	44%
Industrial	9	3	33%
Misc	10	0	0%
Total/Overall	1959	390	20%

In preparing the survey response for the report several smaller tenant groups were aggregated as follows:

- Sporting tenancies included shooting and stalking tenancies;
- Recreation sites included bowling greens, cricket grounds, clay pigeon tenancies, nature reserves, public parks, car parks, community gardens, bike trails, livery and wigwam sites;
- Industrial sites included storage, boat building, craft units, waste transfer, recycling and cold store tenancies;
- Miscellaneous tenancies included woodland and general purpose tenancies that were out with the above categories.

2.5 Analysis

The report provides an analysis of five key customer groups, with the findings presented for each customer group in a separate chapter.

In preparing the report, we highlight the findings from:

- Coastal tenants
- Agricultural tenants
- Residential tenants
- Fishing tenants
- Other tenants

For the Fishing tenant group, we have combined the views of Salmon Fishing, Estate Fisheries and Forth Salmon Fishing into one group.

The 'Other' tenant group includes Commercial, Mines Royal, Sporting, Recreation and Miscellaneous tenancies.

The core questions in the survey questionnaire asked 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

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

3. Key Findings

3.1 Awareness and Perceptions

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

Table 1: Knowledge of Crown Estate Scotland

	Coastal Tenants	Agriculture Tenants	Fishing Tenants	Residential Tenants	Other Tenants
Very Knowledgeable	4%	2%	3%	4%	0%
Quite Knowledgeable	34%	66%	34%	38%	44%

A higher proportion of Agriculture tenants felt that they were quite knowledgeable about the organisation.

Where comparison data is available, the perceived level of knowledge about Crown Estate Scotland has remained constant since 2017 for both Coastal tenants and Fishing Tenants.

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.

Positive sentiment is generally higher amongst Fishing tenants. In contrast, positive sentiment scores are lowest amongst Residential tenants.

Table 2: How would you rate Crown Estate Scotland

	Coastal Tenants	Agriculture Tenants	Fishing Tenants	Residential Tenants	Other Tenants
Clarity and Openness	64%	53%	63%	24%	47%
Understanding your needs	43%	41%	57%	25%	50%
Quality of Communication	53%	51%	69%	30%	50%
Efficiency	47%	38%	63%	21%	57%

Responsiveness	49%	48%	60%	25%	56%
Professionalism	57%	66%	76%	50%	75%
Overall Performance	53%	48%	63%	37%	63%

The metric that scores the highest within each tenant subgroup is ‘Professionalism’.

The metric that scores lowest across four out of the five tenant groups is ‘understanding your needs’.

Positive sentiment has declined for Coastal tenants since the previous research waves, across all the indicators, where comparison data is available. Current sentiment is also lower than the 2017 scores across all the brand metric indicators.

Positive sentiment has also declined amongst Agriculture tenants across all metrics since 2020 and notably on efficiency.

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. Table 3 sets out positive sentiment with a rating of 7 or more.

Advocacy for Crown Estate Scotland is highest amongst Agriculture tenants and lowest amongst Residential tenants.

Table 3: How would you speak about Crown Estate Scotland

I would speak positively about Crown Estate Scotland	Coastal Tenants	Agriculture Tenants	Fishing Tenants	Residential Tenants	Other Tenants
Positive sentiment with a rating of 7 or more	50%	70%	57%	36%	63%

Brand advocacy amongst Coastal tenants has declined since the previous wave of research (2019). The mean score for Coastal tenants is currently 6.1 (compared to a mean of 7 in 2019 and a mean of 6.7 in 2017).

In contrast, advocacy has increased amongst fishing tenants. The current mean score is 6.8. The mean score for Salmon Fishing tenants in 2019 was 5.6.

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. Table 4 illustrates positive sentiment with the percentage of tenants who gave a rating of 7 or more.

Table 4: Attitudes towards the information received directly from Crown Estate Scotland

	Coastal Tenants	Agriculture Tenants	Fishing Tenants	Residential Tenants	Other Tenants
Usefulness of Information	57%	59%	59%	48%	64%
Easy to Understand	72%	79%	62%	64%	81%

Attitudes towards communications from Crown Estate Scotland are generally positive, particularly regarding being easy to understand. Sentiment is lower regarding its usefulness. The tenant group that scored information being useful the lowest was residential tenants. The primary reason given for this related to information being focused on farming and not relevant to them. The 'Other' tenant group was most positive in their attitude towards information received from Crown Estate Scotland.

Sentiment regarding usefulness of information has declined since 2019 amongst Coastal tenants and increased amongst Agriculture and Fishing tenants.

- The current mean score for Coastal tenants is 6.2 (compared to a mean of 6.7 in 2019 and a mean of 6.5 in 2017).
- The current mean score for Agriculture tenants is 6.8. This compares to a mean score for rural tenants of 6.4 in 2020 and 6.3 in 2017.
- The current mean score for Fishing tenants is 6.0. The mean score for Salmon fishing tenants in 2019 was 5.6.

Respondents were asked about their preferred method of communication. Notably, a higher proportion of Residential tenants prefer communication by letter but otherwise tenants preferred communication by email.

Table 5: Preferred Method of Communication

Preferred Method of Communication	Coastal Tenants	Agriculture Tenants	Fishing Tenants	Residential Tenants	Other Tenants
Letter	35%	44%	29%	60%	27%
Email	64%	51%	68%	36%	73%
Frequency of contact appropriate	88%	83%	90%	68%	75%

It can also be seen that the majority of tenants believed the frequency of contact to be appropriate. Satisfaction levels amongst residential tenants is however notably lower.

3.4 Rent and Value for Money

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 in Table 6.

Table 6: Attitudes toward Rent and Value for Money

	Coastal Tenants	Agriculture Tenants	Fishing Tenants	Residential Tenants	Other Tenants
Understanding of how rents are set	42%	47%	46%	36%	38%
Ease of rent payment arrangements	70%	79%	84%	68%	81%
Value for money	45%	55%	53%	48%	63%

Positive sentiment was lower with regard to understanding how rents are set. Satisfaction with ease of rent payments is good although slightly lower for residential tenants.

More 'Other' tenants felt rents were value for money.

Sentiment towards value for money has declined since 2017 amongst Coastal Tenants.

Coastal Tenants	Mean Score 2023	Mean Score 2019	Mean Score 2017
Value for money	5.4	6.0	5.8

Positive sentiment towards value for money has increased for Fishing tenants and Agriculture tenants.

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 in Table 7.

Table 7: Satisfaction with overall service provided by Crown Estate Scotland

Satisfied with service provided by Crown Estate Scotland	Coastal Tenants	Agriculture Tenants	Fishing Tenants	Residential Tenants	Other Tenants
Positive sentiment score of 7 or more	53%	73%	61%	46%	57%

Agriculture tenants expressed the highest levels of satisfaction and residential tenants the lowest.

Satisfaction has declined amongst Coastal tenants since 2017. In contrast, satisfaction has increased slightly for Agriculture tenants and has notably increased for Fishing tenants.

- The current mean score for Coastal tenants is 6.2 compared to a mean score of 7.0 in 2019 and a mean score of 6.8 in 2017.
- The current mean score for Agriculture tenants is 7.1. The mean score for rural tenants in 2020 was 7.0 and 6.7 in 2017.
- The current mean score for Fishing tenants is 6.7. The mean score for Salmon Fishing Tenants in 2019 was 5.7.

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

Table 8: Changes in service received from Crown Estate Scotland over the last two years

Level of service changed in last 2 years	Coastal Tenants	Agriculture Tenants	Fishing Tenants	Residential Tenants	Other Tenants
Much better	2%	12%	3%	0	13%
Better	9%	26%	10%	4%	0
Same	84%	50%	81%	67%	69%
Worse	4%	10%	6%	13%	13%
Much Worse	1%	2%	0	17%	6%

A greater proportion of Agriculture tenants believed the level of service had improved in the last 2 years, notably higher than other tenant groups. In contrast, a greater proportion of Residential tenants believed that the service was worse.

3.6 Managing Agents

Respondents were asked to rate the Managing Agent that they deal with across a range of brand metrics on a scale of 1-10, where 10 was excellent and 1 was poor.

The table below showcases positive sentiment with a rating of 7 or more.

Table 9: How would you rate the Managing Agent

Managing Agent Scores 2023	Coastal Tenants	Agriculture Tenants	Fishing Tenants	Residential Tenants	Other Tenants
Managing Agent	<i>Bidwells</i>	<i>Strutt & Parker</i>	<i>Savills</i>	<i>Strutt & Parker</i>	<i>Strutt & Parker/Wardell Armstrong/LS&PM</i>
Clarity and Openness	66%	53%	72%	47%	57%
Understanding your needs	56%	41%	60%	48%	57%
Quality of Communication	69%	51%	72%	35%	56%
Efficiency	68%	38%	72%	26%	56%
Responsiveness	63%	48%	64%	26%	56%
Professionalism	71%	66%	72%	50%	78%

Overall Performance	64%	48%	68%	39%	50%
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Positive sentiment towards the Managing Agents is generally higher amongst Fishing tenants. In contrast, positive sentiment scores are lowest amongst Residential tenants.

The metric that scores the highest within each tenant subgroup is 'Professionalism' whilst 'Understanding your Needs' scores the lowest. These are the same highest and lowest metrics that tenants scored for Crown Estate Scotland.

Sentiment amongst Coastal tenants towards the Managing Agent is slightly down on all indicators since the 2019 survey. Understanding tenant needs consistently scored the lowest across the three surveys.

Sentiment has declined amongst Agriculture tenants with regard to 'efficiency' and 'responsiveness' of the Managing Agent which are notably lower than the previous survey in 2020.

In contrast, sentiment amongst Fishing tenants has increased across all of the brand metrics since the previous wave of research (2019).

Respondents were asked if the level of service they received from their Managing Agent had changed in the last 2 years.

Table 10: Changes in service received from the Managing Agent changed in the last 2 years

Level of service changed in last 2 years	Coastal Tenants	Agriculture Tenants	Fishing Tenants	Residential Tenants	Other Tenants
Much better	2%	7%	0	4%	14%
Better	7%	29%	4%	8%	14%
Same	90%	46%	90%	60%	50%
Worse	2%	15%	0%	12%	7%
Much Worse	0	2%	4%	16%	14%

It can be seen that a higher proportion of Agriculture tenants and Other tenants stated that the level of service received from the Managing Agent had improved. More residential tenants felt the level of service had got worse than thought it had improved.

4. Conclusions

The 2023 survey was issued to 1959 tenants, of which 390 participated in the research, providing an overall response rate of 20%.

The overall response of 390 completed interviews provides a data set with a margin of error of +/- 4.44% calculated at the 95% confidence interval (market research industry standard) and ranges up to +/- 19.9% for the smallest subgroup.

Awareness and Perceptions

The level of knowledge that tenants have about Crown Estate Scotland significantly varies by type of tenant. Agriculture tenants had the highest level of knowledge about the organisation (68%). In contrast, 38% of both Coastal tenants and Fishing tenants stated they were knowledgeable about the organisation. There has been little improvement in the level of awareness amongst Coastal and Fishing tenants since 2017.

Crown Estate Scotland might want to review their engagement strategy with each of the tenant groups and develop customised communication strategies aimed at building a better understanding about the work of the organisation.

Reputation Management

Fishing tenants have the highest levels of positive brand sentiment towards the organisation, and scored Crown Estate Scotland highest on the following metrics:

- Understanding your needs
- Quality of communication
- Efficiency
- Responsiveness
- Professionalism

Whilst professionalism was rated the highest metric by each of the tenant groups, understanding tenant needs was scored lowest by Residential tenants. It was also given the lowest score amongst Coastal Tenants.

Positive sentiment has also declined for both Coastal and Agriculture tenants since the previous research waves.

Crown Estate Scotland should aim to identify the enablers from the engagement strategy with Fishing tenants that are driving positive sentiment and introduce any lessons learned/approaches (where appropriate) into the engagement strategies for other tenant groups.

In terms of brand advocacy (speaking positively about Crown Estate Scotland), Agriculture tenants exhibited the highest levels of advocacy (70%). In contrast, Residential tenants had the lowest levels of brand advocacy (36%).

Brand advocacy amongst Coastal tenants has declined since the previous wave of research (2019). In contrast, advocacy has increased amongst fishing tenants.

As residential tenants were the least positive across the seven brand metrics, this is likely to have influenced their brand advocacy score.

Consideration should be given to better understanding why Residential tenants have the lowest levels of positive sentiment towards the organisation.

Contact and Communication

Attitudes towards communication were generally positive with regard to being easy to understand and frequency of information. Whilst the tone of communication is generally accepted to be good, sentiment regarding the usefulness of the information varied by tenant group.

Residential tenants scored the usefulness of information lowest. The primary reason cited was lack of relevance with comments relating to content being focused on farming.

Sentiment regarding usefulness of information has declined since 2019 amongst Coastal tenants and increased amongst Agriculture and Fishing tenants.

Crown Estate Scotland should review their communication activity to ensure content is tailored to meet the needs of each tenant type. The organisation should also consider the method of communication, ensuring it reflects the tenant's preferred method. Residential tenants would prefer written communication by letter, whereas Coastal and Fishing tenants expressed a strong preference for email.

Rent and Value for Money

Tenants were least positive about understanding how rents are set. Residential tenants were least positive in this regard.

Crown Estate Scotland should consider how best to improve tenants understanding regarding how rent levels are set.

Whilst all tenant groups were generally positive about ease of rent payment arrangements, attitudes towards value for money varied by tenant group. Residential tenants and Coastal tenants were least positive about value for money.

Sentiment towards value for money has declined since 2017 amongst Coastal Tenants. In contrast sentiment has increased for Fishing tenants and Agriculture tenants.

Satisfaction with Crown Estate Scotland Service

Agriculture tenants expressed the highest level of positive sentiment with regard to satisfaction with the service provided by Crown Estate Scotland. In addition, a greater proportion of Agriculture tenants stated that level of service had improved in the last two years.

In contrast, Residential tenants were least positive, and a greater proportion of Residential tenants felt that the service provided by Crown Estate Scotland had deteriorated in the last two years.

Satisfaction has declined amongst Coastal tenants since 2017. In contrast, satisfaction has increased slightly for Agriculture tenants and has notably increased for Fishing tenants.

Crown Estate Scotland should aim to identify the reasons why Agriculture tenants expressed the highest levels of positive sentiment to better understand the drivers of current tenant satisfaction and to determine whether any lessons that can be applied to improving levels of satisfaction across the other tenant groups.

In addition, Crown Estate Scotland should aim to better understand why 30% of Residential tenants stated that they believed the service provided by the organisation had deteriorated in the last two years.

Managing Agents

Fishing tenants expressed the highest levels of positive sentiment towards their Managing Agent.

Sentiment amongst Coastal tenants towards the Managing Agent is down across all the brand metric indicators since the previous survey. Sentiment has declined amongst Agriculture tenants with regard to 'efficiency' and 'responsiveness' of the Managing Agent since the previous survey. In contrast, sentiment amongst Fishing tenants has increased across all of the brand metrics since the previous wave of research (2019).

Once again, Residential tenants were least positive about the service provided by the Managing Agent, with over a quarter (28%) indicating that they believed the service provided had deteriorated in the last two years.

In contrast, over a third of Agriculture tenants indicated that the service provided by the Managing Agent had improved over the last 2 years (36%).

Crown Estate Scotland should aim to better understand the reasons why Agriculture tenants believe the service provided by their Managing Agent has improved and identify any learning points to better manage the service performance across all the Managing Agents contracted to Crown Estate Scotland.