

**Agenda**  
**Thirty-sixth Meeting**  
**Crown Estate Scotland Board**  
**Quartermile Two, Edinburgh**  
**30 August 2023**  
**10am – 3pm**

- 1. Standing Items**
  - 1.1 Welcome and Declarations of Interest
  - 1.2 Approval of Minutes of Meeting held on 24 May 2023 Attached
  - 1.3 Matters Arising and Action Trackers Attached
  
- 10.10 2. Board Committees**
  - 2.1 Investment Committee Verbal
  - 2.2 Appointment of Chair of Investment Committee BD(2023)36.1
  - 2.3 Remuneration Committee Verbal
  - 2.4 Audit & Risk Committee Verbal
  
- 10.30 3. Decisions**
  - 3.1 Nigg Business Case BD(2023)36.2
  
- Short break
  
- 11.10 4. Discussion**
  - 4.1 Value Project Update Presentation
  - 12.10 4.2 10+ year investment model presentation** Presentation
  - 12.30 4.3 CCS Leasing - update** BD(2023)36.3
  
- Lunch at 1pm
  
- 1.30 \* 4.4 Property and Aquaculture Tenant Surveys** BD(2023)36.4
- 2.10 4.5 Decarbonisation and the Glenlivet Estate** BD(2023)36.5
  
- 2.40 5. Management Reports**
  - 5.1 Chief Executive's Report BD(2023)36.6
  - \* 5.2 Finance Report BD(2023)36.7
  - \* 5.3 People Report BD(2023)36.8
  - + 5.4 Stakeholder Engagement BD(2023)36.9
  
- 6. Any Other Business**
  
- 7. Date of Next Meeting**  
29 November 2023

\*This item will be treated as closed business and the paper exempt from publication in terms of s33(1)(b) of the Freedom of Information (Scotland) Act 2002

\*\* This item will be treated as closed business and the paper exempt from publication in terms of s29(1)(a) of the Freedom of Information (Scotland) Act 2002.

+ This item is for noting

<b>Minutes for</b>	<b>Thirty-sixth Board Meeting</b>	<b>BD(2023)36</b>
<b>Meeting date</b>	<b>30 August 2023</b>	
<b>Security classification</b>	<b>Restricted</b>	
<b>This document contains commercially sensitive and confidential information and may relate to the formulation of policy.</b>		
<b>Minutes for the meeting of the Board of Crown Estate Scotland held at Quatermile 2, Edinburgh and by video conference call on Wednesday, 30 August 2023</b>		

**Present:**

Euan McVicar	Chair
Ann Allen	until Minute item 6
Dr Michael Foxley	
Liz Leonard	
Jean Lindsay	until Minute item 5.2
Robert Mackenzie	
Ailsa Raeburn	until Minute item 5.1

**In attendance:**

Ronan O'Hara	Chief Executive (until Minute item 5.3)
Esther Black	Director of Corporate Operations
Oster Milambo	Director of Property
Alastair Milloy	Director of Finance & Business Services
Colin Palmer	Director of Marine
Helen Howden	Head of Governance (minutes)

**By invitation:**

Annie Breadon	Head of Policy (for Minute item 3.2)
Craig Burns	Aquaculture Rent Co-ordinator (for Minute item 4.3)
Chris Cassels	Head of Asset Management (Property) (for Minute item 4.3)
Tom Findlay	Energy Ports Development Manager (for Minute item 3.1)
Fiona Haywood	Head of People (for Minute item 5.3 )
Anneli Hill	Aquaculture Stakeholder and Planning Manager (for Minute item 4.3)
Anna Morgan	Financial Controller (for Minute item 5.1)
Emma Riach	Aquaculture Lease Co-ordinator (for Minute item 4.3)
Fiona Simpson	Asset Manager (for Minute item 4.3)
Sian Wilson	Head of Offshore Development (ET&I) (for Minute item 4.2)
Tom Hill, Hendry	Savills (for Minute item 3.2)
Lefleming and Aidan	
Richardson	
Alistair McCrae	Axiom Research & Consultancy (for Minute item 4.3)

## **1. Standing Items**

### **1.1 Welcome and Apologies**

The Chair welcomed everyone to the meeting and noted that apologies had been received in advance from Katerina Brown.

### **1.2 Declarations of Interest**

There were no new declarations of interest in respect of items on the agenda. Members were reminded that Ailsa Raeburn is a member of the Board of Highlands and Islands Enterprise (HIE) and that HIE were also involved in the potential development at Nigg. Ms Raeburn does not take part in the discussions on Nigg during HIE Board meetings.

### **1.3 Approval of Minutes of Meetings held on 24 May 2023**

The minutes of the meeting held on 24 May 2023 were **approved**.

### **1.4 Matters Arising and Action Tracker**

**Noted** that:

- (a) the Audit & Risk Committee had been advised that the principles and assumptions relating to the costs of managing the ScotWind options were still being discussed internally (action 33/1).
- (b) the timescale for presenting further information and analysis on pay, recruitment and retention required to be moved to 30 November 2023 (action 34/3).
- (c) the Direction which is required to be issued by Scottish Ministers in relation to the preparation of Crown Estate Scotland's accounts had not yet been issued. A draft was in circulation and this matter would be escalated if the Direction had not been issued by the Board meeting in November (action 35/1).

## **2. Board Committees**

### **2.1 Investment Committee**

**Noted** that:

- (a) the Committee had last met on 8 August and had received an update on the capital position which had indicated continuing underspend for reasons which had been discussed by the Committee and Board previously. Information on the development of KPIs for the portfolio and on the status of investment projects was given to the Committee.
- (b) the main focus of the meeting had been on the proposed investment at Nigg and the Committee had recommended that the business case be presented to Board subject to certain conditions.

- (c) a paper had been presented on the status of the three Capital Challenge Funds and the Committee had been advised that a consultant would be engaged to provide additional resourcing, including delivering an objective analysis on the bids. The consultant would also be asked to provide a reflective analysis of potential design of any future funds of this nature. The Committee also requested that the Executive Team reflect on lessons learned to be presented at the same time as the consultant's report.
- (d) the committee had been updated on the Zero Four project and had noted that the major project risks identified in the Gateway review were being addressed and that Gardiner & Theobald had been engaged to assist in management of the project.
- (e) the committee had been updated on plans to improve and accelerate capital delivery.

## **2.2 Appointment of Chair of Investment Committee (paper BD(2023)36.1)**

**Noted that:**

- (a) following the appointment of Euan McVicar as the Chair of Crown Estate Scotland's Board he had decided to stand down as Chair of the Investment Committee. The Board were asked to appoint Ailsa Raeburn as Chair of the Committee with immediate effect.
- (b) until the appointment of new Board members, Euan McVicar would continue as a member of the Committee.

**Agreed that:**

- (a) the Board approved the appointment of Ailsa Raeburn as Chair of the Investment Committee with immediate effect.

## **2.3 Remuneration Committee**

**Noted that:**

- (a) at its meeting on 9 August 2023 the Committee endorsed the draft Pay and Reward Strategy 2023-25. The Committee received a paper setting out a potential negotiating position in response to the 2023-24 pay claim submitted by PCS but after consideration concluded that further information was required before approval could be given.
- (b) Scottish Government had published their pay strategy for 2023-24 which includes a pay award floor of 2% and a ceiling of 5%. Affordability required to be justified and the Executive had been asked for further evidence to support their recommendation to the Committee.
- (c) other points in the Scottish Government's pay strategy to note include the option for a multi-year approach to pay settlement; the adoption of a right to disconnect policy; and the standardisation of a 35-hour working week across the public sector.

## **2.4 Audit & Risk Committee**

**Noted that:**

- (a) the Committee had met the previous day, 29 August, and had received a finance report, procurement activity report, information on the progress of the annual external audit, and an internal audit report on strategic planning. The Committee had also reviewed the H&S dashboard and the whistleblowing policy.
- (b) the finance paper reported a reduction of £1.8m in revenue from offshore wind production from forecast, which would be reflected in the final accounts. The Committee were asked to note that as production revenues form an increasing proportion of Crown Estate Scotland's income there would continue to be a volatility on income against forecast.
- (c) the Committee noted that work on the external audit had been suspended due to capacity issues within the Crown Estate Scotland finance team and would recommence in October when vacancies in the team had been filled. The Committee were given assurance that there were no significant findings to be drawn to their attention and that the final report would be submitted to the November Committee meeting.
- (d) risk management was also considered by the Committee with some of the issues discussed being noted in the Chief Executive's Report presented to Board. The Committee were updated on the Montrose ZeroFour project, which Board had discussed during an informal session on 2 August. It was noted that capacity and resilience remained of concern and that this had come through in the staff survey, the high level results of which had been communicated to Board during the session on 2 August.

*The Energy Ports Development Manager joined the meeting.*

### **3. Decisions**

#### **3.1 Nigg Business Case (paper BD(2023)36.2)**

**Confidential – Closed Business**

**Noted that:**

- (a) the Investment Committee had considered the business case for the proposed investment at its meeting earlier in the month and had subject to certain conditions recommended that the business case be presented to Board but that there was information which still required to be seen before a final decision was made. This information included the legal advice on subsidy control and final information from the valuers, including the valuation report.
- (b) the Committee had discussed risk, both financial and reputational, as well as questioning some aspects of the back-to-back deal. They had also questioned officers about the extent of community engagement in relation to the proposed development on the site.
- (c) the business case for the investment, which would require the approval of Scottish Ministers, included the assumption that the rental payments received by Crown Estate Scotland would be converted to capital.
- (d) the intention was to sign non-binding heads of terms with both the landowner and prospective tenant in the next few weeks and that planning permission would be

submitted shortly thereafter. The cable manufacturer who would occupy the site wanted to be on-site before the end of the calendar year.

- (e) the Chief Executive advised the Board that the SRO for the project was the Director of Marine and that this should have been included in the paper.
- (f) the Board likewise questioned officials on the terms of the proposed transaction and asked for clarification on aspects of the commercial deal and asked that the business case draw out all the benefits, not just the financial ones.

**Agreed that:**

- (a) the Board were supportive of the business case presented and noted that the heads of terms with the landowner and with Global Energy Nigg would be entered into. Once the final advice from the solicitors and valuers was received, the information would be circulated to Board for consideration. A call would be arranged to allow members to discuss the information presented before a final decision was reached.

**Action: 36/1 (CP)**

*The Energy Ports Development Manager was thanked for his contribution and he left the meeting.*

*The Head of Policy joined the meeting along with Tom Hill, Henry Lefleming and Aidan Richardson from Savills.*

#### **4. Discussion**

##### **4.1 Value Project Update**

**Noted that:**

- (a) the Board received a presentation from the Head of Policy and the representatives from Savills on the background to the value project and on the development of a value reporting framework to support transparent, systematic decision-making. The reporting framework will have outputs which will be used in the corporate planning process currently underway.
- (b) the value reporting framework was designed to map data against the value project categories and then identify a set of value indicators for each of the categories and associated metrics.
- (c) Savills are also preparing a carbon profiles report for Crown Estate Scotland as a separate piece of work from the value reporting framework. The carbon profiles will be used to aid discussions on how to reduce carbon emissions not within the direct control of the organisation.
- (d) during discussion members of the Board suggested that the language could better reflect that used in the Scottish public sector, such as community wealth-building and the wellbeing economy, as well as aligning to the outcomes which Scottish Government are seeking to delivery.

- (e) a trial of how the annual reporting against the framework was being prepared using the data in the latest annual report and accounts.
- (f) it will take time to embed the reporting framework within the organisation and some asset classes will be prioritised to allow the use of the framework to be tested and developed. It was queried whether there would be a requirement to engage specialists to support the journey to build internal capability.

**Agreed that:**

- (a) the Board welcomed the development of the value reporting framework and would like to consider it further during the November meeting, along with further information on the criteria for the metrics proposed and how the asset prioritisation would be agreed.

**Action: 36/2 (EB)**

- (b) the language used in the framework and its alignment with Scottish Government priorities would be reviewed before it was brought back to Board.
- (c) once available, the trial reporting against the latest annual report will be circulated to Board.

**Action: 36/3 (EB)**

*The Head of Policy and the representatives from Savills were thanked for their presentation and they left the meeting.*

*Secretary's note: due to time constraints it was agreed that the next agenda item, a presentation on the 10+ year investment model would be recorded outwith the meeting and circulated to members following conclusion of the meeting.*

*The Head of Offshore Development (ET&I) joined the meeting.*

#### **4.2 CCS Leasing – Update (paper BD(2023)36.3)**

**Noted that:**

- (a) the paper submitted to Board was accompanied by a presentation giving an update on activity in relation to CCS (carbon capture and storage) undertaken by the organisation following the update given to Board in March 2023 as well as an explanation of the opportunity for growth as the leasing demand increased.
- (b) the presentation identified the decision points for the organisation over coming months and highlighted the proactive approach the team were taking in relation to being ready to respond to the development of CCS leasing. This includes having appointed consultants to provide an independent commercial assessment and undertaking engagement with NSTA and other bodies.
- (c) further papers on the leasing design would be brought to Board and would address mitigation of any potential reputational issues relating to the leasing proposals.

*The Head of Offshore Development (ET&I) was thanked for her presentation and contribution before she left the meeting.*

*Alistair McCrae, Axiom Research and Consultancy joined the meeting along with members of the Property and Aquaculture teams.*

#### **4.3 Property and Aquaculture tenant surveys (paper BD(2023)36.4)**

**Noted that:**

- (a) the Board received a presentation from Axiom Research and Consultancy on the methodology used to carry out the triennial survey of property and aquaculture tenants and the results of those surveys.
- (b) the results from the aquaculture tenant survey were overwhelmingly positive and the Board congratulated the team present for their work in relation to engagement with the aquaculture tenants, particularly given that rents were rising following the conclusion of the review of aquaculture leasing.
- (c) in some areas the property tenant survey results, particularly the responses from residential tenants, showed low satisfaction rates.

**Agreed that:**

- (a) the Executive Team should reflect on these results internally before deciding how to respond, including identifying which metrics would be appropriate to include in corporate planning and future KPIs. The output of the reflections should be brought back to Board, either as a separate paper or in the Chief Executive's Report.

**Action: 36/4 (EB / OM)**

*Alistair McCrae was thanked for his presentation and he left the meeting along with the members of the Property and Aquaculture teams. Ailsa Raeburn gave her apologies and left the meeting at this point.*

*Secretary's note: the Board agreed that the next agenda item, Decarbonisation, and the Glenlivet Estate, would be held over until the next meeting. It was also agreed that the Finance Report would be taken ahead of the Chief Executive's Report*

*The Financial Controller joined the meeting.*

## **5. Management Reports**

### **5.1 Finance Report (paper BD(2023)36.7)**

**Noted that:**

- (a) the Audit & Risk Committee had been advised on 29 August 2023 that there would be an amendment made to the draft accounts to reflect the reduction in revenue received in relation to offshore wind which was £1.8m below the forecast.



- (b) management accounts for the first quarter had not yet been finalised due to resource constraints within the finance team. It is anticipated that offshore wind production revenue will be lower than has been budgeted, in part due to lower than expected production on one site and a drop in energy prices. Delays in filling vacancies and staff churn will also result in staff costs for the three months to 30 June 2023 being lower than budgeted.
- (c) the regular reforecast of the budget will be undertaken in the autumn.
- (d) the Investment Committee had received a high level summary of the forecast capital expenditure and had noted that there would be under-expenditure in a number of areas. This was being closely monitored by the Executive Team with a working group having been formed to identify where additional capital deployment could be made.

*The Financial Controller was thanked for her paper and she left the meeting.*

*Jean Lindsay gave her apologies and left the meeting.*

## **5.2 Chief Executive's Report (paper BD(2023)35.3)**

**Noted** that:

- (a) a tenant on the rural estate had to be rehoused following a structural survey report which deemed the property they occupied to be unsafe. Options for the rebuilding or repair were being collated and it was likely that these would require to be considered by the Investment Committee.
- (b) there was a need to review the investment strategy which did not currently fully take account of the total cost of management. The Chief Executive was intending to present a new, interim, investment strategy to the November meeting of the Investment Committee or shortly thereafter.

**Agreed** that:

- (a) the Board required assurance, within the next four weeks, that there are no other properties in such a bad way structurally and a report confirming that the actions which were being taken to identify any potential risks and the actions to undertake detailed surveys.

**Action: 36/5 (OM)**

*The Chief Executive gave his apologies and he left the meeting.*

*The Head of People joined the meeting.*

## **5.3 People Report (paper BD(2023)36.8)**

**Noted** that:

- (a) the Board had already received a high level briefing on the staff survey. The next step was for Axiom Research and Consultancy to take staff through the results and then the organisation would work collectively on planning actions to address the results. Support

would be provided by the Culture Builders with an in-person all-staff event being arranged for mid-September. The full results and the proposed actions would be brought to Board later in the year.

- (b) communications had been issued about how staff could seek support and help if they were struggling and what to do if they were the subject of any bullying or harassment in the workplace.

*The Head of People was thanked for her contribution and she left the meeting.*

*Ann Allen gave her apologies and left the meeting.*

#### **5.4 Stakeholder Engagement** (paper BD(2023)36.9)

The Board **noted** the content of the paper.

### **6. Any other business**

**Noted** that:

- (a) the Board would welcome an early opportunity to discuss in full the emerging financial environment, following the publication of the new Fiscal Framework for Scotland.

### **7. Date of Next meeting**

29 November 2023

## Board Paper

<b>Date of Meeting:</b>	1 March 2023
<b>Classification:</b>	Unrestricted
<b>Subject:</b>	Appointment of Chair of Investment Committee
<b>Paper Number:</b>	BD(2023)36.1
<b>Annexes:</b>	n/a
<b>Recommendation:</b>	The Board is invited to approve the appointment of Ailsa Raeburn as Chair of the Investment Committee with immediate effect.
<b>Presenter:</b>	Euan McVicar
<b>Author:</b>	Helen Howden

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to generate lasting value for Scotland**

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### 1. Purpose and context

This paper seeks Board approval of the appointment of Ailsa Raeburn as Chair of the Investment Committee.

### 2. Chair of Investment Committee

Following my appointment as Chair of the Crown Estate Scotland Board I have decided to stand down as Chair of the Investment Committee. Ailsa Raeburn has agreed, subject to Board approval, to take on this role with immediate effect. I will continue to attend the Committee meetings and to contribute as a member until the next round of recruitment for new Board members has been concluded.

## Board Paper

<b>Date of Meeting:</b>	30 August 2023
<b>Classification:</b>	Unrestricted
<b>Subject:</b>	CCS Leasing – update
<b>Paper Number:</b>	BD(2023)36.3
<b>Annexes:</b>	<b>Annex A: Briefing</b>
<b>Recommendation:</b>	The Board is invited to (a) note the content of this paper and the presentation and (b) provide feedback on them.
<b>Presenter:</b>	Sian Wilson and Colin Palmer
<b>Author:</b>	Sian Wilson

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### 1. Purpose and context

This is a brief introductory paper to support the CCS (Carbon Capture and Storage) Leasing presentation, copy of which is also included in the pack, that will be presented at the Board meeting on 30 August 2023.

### 2. Background

In terms of potential revenue income in the future, carbon dioxide storage presents a significant opportunity to Crown Estate Scotland, notwithstanding UK net zero requirements and potential economic benefits including the just transition. CCS is also in a complicated Regulatory space without clear Planning coverage in Scotland.

The NSTA (North Sea Transition Authority) have recently offered licences for 6 new CCS projects in Scottish Waters. A lease from Crown Estate Scotland will be required if these projects are to be built. Decisions on if, how, and when we offer agreements to these projects, including what the terms of them are, require to be made.

Secondly, for CCS leasing in the future we require to consider what our longer term approach should be in what is a complex and uncertain environment with a number of parties to co-ordinate with. In particular early consideration is being given to co-ordinating with parties such as NSTA in developing an optimal approach to managing the seabed and future CCS leasing.

The briefing today gives an update to the Board on the work the team has been progressing to inform development of leasing and enable the opportunity, whilst ensuring that risks to Crown Estate Scotland in our role as land manager are mitigated. This includes independent commercial assessment, resource characterisation work, and engagement with NSTA and The Crown Estate (where appropriate) to enable development to progress whilst ensuring we comply with our obligations as Crown Estate Scotland.

The briefing today will give an update on the work that has been progressed since the last Board meeting and an overview of the opportunity, then highlights anticipated upcoming points when recommendations will be put to Board regarding a) leasing for projects already offered NSTA licences and b) future leasing, including some of the relevant issues and challenges.

The Board is requested to note the presentation. A discussion will follow which will enable any comments or questions from the Board, with feedback invited in advance of recommendations being passed to the Board later in the year.

Please note for reference we have presented to the Board previously on CCS:

- Board paper BD(2021)26.7 – Carbon Capture & Storage – Leasing offering update
- Board presentation – CCS Update – 1 March 2023.

## Board Paper

<b>Date of Meeting:</b>	30 August 2023
<b>Classification:</b>	Unrestricted
<b>Subject:</b>	Property and Aquaculture tenant surveys
<b>Paper Number:</b>	BD(2023)36.4
<b>Annexes:</b>	Annex A: Research Report - 2023 Property Tenants Survey Annex B: Research Report - 2023 Aquaculture Tenants Survey
<b>Recommendation:</b>	The Board is invited to note the survey results and to receive a presentation from Axiom Research & Consultancy.
<b>Presenter:</b>	Esther Black
<b>Author:</b>	Esther Black and Axiom Research & Consultancy

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### 1. Purpose and context

As part of our commitment to excellent tenant service and continual improvement, Crown Estate Scotland tenants are surveyed approximately once every three years.

The annexes present the findings of two recent tenant surveys – Property and Aquaculture. The research was carried out by research agency Axiom Research & Consultancy.

### 2. Background

The reports highlight the key findings from quantitative surveys of Crown Estate Scotland tenants.

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 reports highlight 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 surveys are coordinated by the Policy team with input from the relevant asset team. Follow up actions are led by the asset teams.



# BD(2023)36.4 – Annex A

## Research Report

### 2023 Property Tenants Survey

Prepared for:

**Crown Estate Scotland**

**August 2023**

Prepared by:  
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**Appendices:**

Appendix 1: The Questionnaire

Appendix 2: Technical Report

Authored by:		Reviewed by:	
Name	Alistair McCrae	Name	Linda Roddie
Position	Director – Strategic Insight	Position	Account Director
Date	1 <sup>st</sup> August 2023	Date	2 <sup>nd</sup> August 2023

## Executive Summary

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

The range of margin of error across different tenant groups in this report reflects the different numbers of tenants who responded to the survey. 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. See Table R1: Survey Response Profile in the full report.

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

### **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
<b>Very Knowledgeable</b>	4%	2%	3%	4%	0%
<b>Quite Knowledgeable</b>	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.

### **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
<b>Clarity and Openness</b>	64%	53%	63%	24%	47%
<b>Understanding your needs</b>	43%	41%	57%	25%	50%
<b>Quality of Communication</b>	53%	51%	69%	30%	50%
<b>Efficiency</b>	47%	38%	63%	21%	57%
<b>Responsiveness</b>	49%	48%	60%	25%	56%
<b>Professionalism</b>	57%	66%	76%	50%	75%
<b>Overall Performance</b>	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'.

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.

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%

### 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 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.

Respondents were subsequently asked about their preferred method of communication. Notably, a higher proportion of Residential tenants prefer communication by letter but otherwise the tenants' preferred communication is 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%

<b>Frequency of contact appropriate</b>	88%	83%	90%	68%	75%
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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.

### **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.

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.

**Table 6: Attitudes toward Rent and Value for Money**

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

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

### **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.

**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.

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.

### **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
<b>Managing Agent</b>	<i>Bidwells</i>	<i>Strutt &amp; Parker</i>	<i>Savills</i>	<i>Strutt &amp; Parker</i>	<i>Strutt &amp; Parker/Wardell Armstrong/LS&amp;PM</i>

<b>Clarity and Openness</b>	66%	53%	72%	47%	57%
<b>Understanding your needs</b>	56%	41%	60%	48%	57%
<b>Quality of Communication</b>	69%	51%	72%	35%	56%
<b>Efficiency</b>	68%	38%	72%	26%	56%
<b>Responsiveness</b>	63%	48%	64%	26%	56%
<b>Professionalism</b>	71%	66%	72%	50%	78%
<b>Overall Performance</b>	64%	48%	68%	39%	50%

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.

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**

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

## 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. A copy of the survey questionnaire is provided in Appendix 1.

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 we have not always been able to compare this current survey directly 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 margin of error is an assessment of how accurate your sample data is, compared to the results you may have achieved if you had interviewed everyone in your target population. Therefore, the margin of error provides a measure of how much weight you should place on decisions that are made using the survey data. The level of weight you place on the results depends on what margin of error you find acceptable. An acceptable margin of error is usually considered to be below +/- 8% (based on a 50% estimate at the 95% confidence level).

The range of margin of error across different tenant groups in this report reflects the different numbers of tenants who responded to the survey (see below - Table R1: Survey Response Profile). More Coastal tenants responded to the survey than 'Other' tenants, for example. 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 R1: 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%
<b>Total/Overall</b>	<b>1959</b>	<b>390</b>	<b>20%</b>

In preparing the sample design 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 included storage, boat building, craft units, waste transfer, recycling and cold store sites;
- Miscellaneous tenancies included woodland and general purpose tenancies that were out with the above categories;

- It should be noted that a number of categories were excluded from the sample including garden ground, mast sites, mob phone sites, sites for garage, bus stop, thorton farm borehole, estate tracks, gauging station, substation, goat well springs, and pumping station, and any of the 'land at and ground at' tenancies.

## 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 tenancies, Recreation sites and Miscellaneous tenancies. We have aggregated the Other group in this way because of the small number of tenants in each tenancy type, and in order to ensure anonymity is maintained by presenting a collective view of their perceptions and experiences.

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).

## 2.6 Report Structure

The report details the main findings to emerge from the research, addressing the key research aims for Crown Estate Scotland. The main findings for each of the five customer sub-groups described above considers the following themes:

- Awareness and Perceptions
- Service and Communication
- Contact and Communications
- Rent and Value for Money
- Overall Satisfaction
- Dealing with Managing Agents
- Comments

In addition, the following supporting information has been provided as appendices:

Appendix 1: Questionnaire  
Appendix 2: Technical Report

### **3. Coastal Tenants**

#### **3.1 Introduction**

The survey was sent to 1552 coastal tenants. A total of 270 completed interviews were achieved representing a response rate of 17.4%.

It should be noted that overall response rates to the survey have declined amongst coastal tenants, from 30% in 2017, to 21% in 2019 and now to 17.4%.

The survey accuracy (margin of error) is +/- 5.4 % based on a 50% estimate at the 95% confidence interval. This means that in 19 cases out of 20, a percentage result of 50% obtained from a single representative sample of 270 would reflect a true value – the value obtained by interviewing everyone in the target audience – of between 44.6% and 55.4%, with the most likely value being 50% itself.

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 whole.

Therefore, the survey of coastal tenants provides a statistically reliable picture of the views, attitudes, and experiences of coastal tenants. However, when reviewing the results, it should be recognised that any shifts in attitudes that fall within a range of 5.4% from the 2023 survey scores should not be considered a statistically significant shift in attitudes amongst coastal tenants.

The following section of the report sets out the results from the 2023 tenants survey and where possible compares survey scores with the previous research conducted with coastal tenants in 2019 and 2017.

#### **3.2 Awareness and Perceptions**

Respondents were initially asked about how knowledgeable they felt they were about Crown Estate Scotland. 51% felt they were aware, but not very knowledgeable about the organisation.

	2023 Score	2019 Score	2017 Score
Very knowledgeable about Crown Estate Scotland	4%	4%	6%
Quite knowledgeable about Crown Estate Scotland	34%	31%	39%
Aware but not very knowledgeable about Crown Estate Scotland	51%	57%	44%
Have little knowledge of Crown Estate Scotland	9%	7%	11%
Have no knowledge of Crown Estate Scotland	3%	1%	1%

34% indicated that they were aware and quite knowledgeable, with a further 4% indicating that they were aware and very knowledgeable about Crown Estate Scotland.

This is a similar pattern to the scores that emerged from the previous research with coastal tenants in 2019 (35%). However, there has been a slight increase in the proportion of respondents who were aware but had little or no knowledge about the organisation (12% compared to 8% previously). It should also be noted that the percentage of those that indicated they were knowledgeable has decreased since 2017 (44% compared to 38% in 2023).

### 3.3 Service and Communications

Respondents were asked how they rate Crown Estate Scotland across a range of brand metrics on a scale of 1-10, where 1 was very poor and 10 was excellent. It should be noted that the metric 'Professionalism' was added into the 2023 survey to ensure consistency across all current tenant surveys and was not previously asked, therefore no comparison data is available. We present the data showcasing the mean score.

Positive sentiment would be reflected with a mean score closest to 10.

	Mean Score 2023	Mean Score 2019	Mean Score 2017
Clarity and openness	5.6	7.3	6.9
Understanding your needs	5.2	6.9	6.6
Quality of Communication	6.0	7.3	7
Efficiency	5.2	7.5	6.9
Responsiveness	5.2	7.4	7.1

Professionalism	6.0	n/a	n/a
Overall Performance	5.9	7.4	7.1

Positive sentiment is currently highest for:

- Quality of communication
- Professionalism

Positive sentiment is currently lowest for:

- Understanding your needs
- Efficiency
- Responsiveness

Compared to the survey scores reported in 2019, positive sentiment has declined across the indicators where comparison data is available. Current sentiment is also lower than the 2017 scores across all the brand metric indicators.

Respondents were then asked **how they would speak about Crown Estate Scotland to others** (on a scale of 1 to 10 where 1 was very negatively and 10 was very positively).

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
4%	2%	3%	7%	13%	13%	15%	11%	12%	12%	8%

50% of the respondents provided a rating of 7 or more, indicating a positive sentiment towards the organisation. The mean score is 6.1 (compared to a mean of 7 in 2019 and a mean of 6.7 in 2017).

### 3.4 Contact and Communications

Respondents were asked how they felt about the information they received directly from Crown Estate Scotland. When asked to rate the **usefulness of the information** they received



(on a scale of 1 to 10 where 1 was not all useful and 10 was very useful), respondents were largely positive.

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
4%	2%	3%	3%	13%	7%	15%	15%	10%	17%	7%

57% of the respondents provided a rating of 7 or more, indicating they felt the information received was useful. The mean score is 6.2 (compared to a mean of 6.7 in 2019 and a mean of 6.5 in 2017).

When asked if they wished to make any additional comment on their response given with regard to the usefulness of information, the top six responses included:

- Information is fine / meets needs (10 comments)
- Information is not relevant (8 comments)
- Only receive an invoice (6 comments)
- Communication is via Managing Agents (4 comments)
- Kept up to date with recent changes (4 comments)

Respondents were asked to rate **how easy it is to understand the information received** from Crown Estate Scotland (on a scale of 1 to 10 where 1 was not all easy and 10 was very easy).

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
2%	1%	2%	2%	7%	7%	12%	25%	12%	23%	10%

72% of the respondents provided a rating of 7 or more, indicating they felt the information received was easy to understand. The mean score is 7.0 (compared to a mean of 7.7 in 2019 and a mean of 7.7 in 2017).

When asked if they wished to make any additional comment on their response given with regard to how easy the information is to understand the most commonly cited responses included:

- Information is concise / well written (17 comments)
- We only really receive invoices (6 comments)
- Little information received (5 comments)
- Not enough face to face personal contact (5 comments)
- More big picture information would be useful (3 comments)

Respondents were asked to provide comments on what key things they would like to hear about from Crown Estate Scotland. The most cited themes to emerge included:

Key things you would like to hear about	No of respondents	Illustrative Comments
Breakdown on how the revenue is spent	13 comments	<p>Improve transparency as to what we are charged</p> <p>What are they doing with the funds</p> <p>Where is the rent money spent</p> <p>What income it generates and how is it spent</p> <p>How is income returned to local projects</p> <p>What am I getting for the money</p> <p>More on financials, where does our money go</p>
Operational activities / CES performance	11 comments	<p>How are they constituted</p> <p>Who manages their performance</p> <p>Mission statement to help explain the role of CES</p> <p>More info on what it does</p> <p>More info on projects undertaken by CES</p> <p>Process improvement and cost reduction</p>
Relevant information on changes / developments that affect us directly	7 comments	<p>Updates on developments near me</p> <p>Would like to be informed at an early stage on major developments that affect our surroundings</p> <p>Any future changes that are happening</p>
How can CES help us?	6 comments	<p>Grant applications/ grant schemes</p> <p>Help / assistance for Island communities</p> <p>Funding opportunities for Harbours</p> <p>Support for energy schemes</p>

Respondents were asked **how they would like Crown Estate Scotland to communicate with them**. 64% indicated that they would like information to be sent by email (an increase of 9% compared to the previous research in 2019).

	2023 Score	2019 Score	2017 Score
Letter	35%	56%	46%
Email	64%	55%	64%
Other (please write in below)	1%	2%	4%

1% indicated that they would like communication to come directly via the Managing Agent.

Respondents were then asked if the **frequency of contact was appropriate and met their needs**. The majority of respondents indicated that the frequency of contact was appropriate.

	2023 Score	2019 Score	2017 Score
Yes	88%	86%	88%
No	12%	14%	12%

Where respondents indicated that communication did not meet their needs, they were asked to explain how things could be improved. Of the twenty-four comments received, the most commonly cited responses related to lack of contact on issues other than invoicing/rent collection (12 comments).

Some specific suggestions were cited including:

- More regular contact on area specific initiatives (3 comments)
- Develop a quarterly newsletter (2 comments)

Respondents were asked to **rate to what extent they would say that Crown Estate Scotland (including its Managing Agents) worked in partnership with them** (on a scale of 1 to 10 where 1 was not at all and 10 was extensively).

The table below shows the range of scores. Opinion was fairly evenly split.

1	2	3	4	5	6	7	8	9	10	Don't know
14%	7%	5%	4%	11%	8%	9%	10%	10%	8%	14%

37% of the respondents provided a rating of 7 or more. 30% provided a rating of 4 or less. The mean score is 4.7. This is a new question that was not asked in the 2019 or 2017 surveys.

### 3.5 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, the following responses emerged.

	Mean Score 2023	Mean Score 2019	Mean Score 2017
Understanding of how rents are set	5.1	5.3	5.4
Ease of rent payment arrangements	7.3	8.0	7.6
Value for money	5.4	6.0	5.8

Satisfaction was highest for ease of rent payment arrangements and lowest with regard to understanding how rent levels are set. This was the same pattern that emerged in the 2019 and 2017 survey of coastal tenants.

Respondents were then provided with an opportunity to provide additional comments relating to their views on rents and value for money. 103 comments were received. The most cited comments related to:

- Do not feel we get anything for the mooring fees we pay (12 comments)
- Do rents take into account local issues or is one rent set for all? (10 comments)
- Increase higher than the rate of inflation – increase not justified. (6 comments)

### 3.6 Overall Satisfaction

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.

1	2	3	4	5	6	7	8	9	10	Don't know
5%	2%	3%	2%	18%	10%	13%	18%	8%	14%	7%

53% of respondent indicated that overall, they were satisfied providing a rating of 7 or more with the service provided by Crown Estate Scotland. This compares to 12% who expressed dissatisfaction with a rating of 4 or less. The mean score is 6.2 compared to a mean score of 7.0 in 2019 and a mean score of 6.8 in 2017.

Respondents were free to add any additional comments they had on their views relating to overall service. 63 comments were received.

The most commonly cited theme that emerged related to the question of what service was actually being delivered for the rent/ fees they were paying (19 comments). This was set against a backdrop of recent rent increases and a general lack of understanding about how rent/fees were set.

Respondents were further asked whether they felt **the level of service they received from Crown Estate Scotland had changed in the last two years.**

Much Better	2%
Better	9%
Same	84%
Worse	4%
Much Worse	1%

The majority of respondents indicated that they believed the level of service to be the same (84%). 11% indicated they felt it was better. In contrast 5% indicated they felt it was worse. Where respondents felt the service was worse, comments tended to relate to some pushback regarding the recent rent increases and lack of explanation to justify the increase which were perceived as excessive. In addition, some comments related to slower than expected response times to queries.

Where respondents believed the service to have improved, comments related to a perception that Crown Estate Scotland had made a conscious effort to improve communication with tenants over the last two years.

Respondents were asked to comment on **how they would like the service to improve.** 109 comments were received. The most commonly cited themes to emerge were:

- More information on the service they actually provide (26 comments)
- Reduce rents (7 comments)
- Offer better value for money (5 comments)
- Enforcement action against unlicensed moorings (3 comments)

- Help takeover unused / abandoned moorings (2 comments)

Interviewees were then asked, **thinking broadly about what impacts on you/your business, what are your key concerns in the short term (ie the next 2 to 3 years)?**

148 comments were received. Analysis of the open-ended statements provided by respondents identified the following key themes:

- Increasing costs (fees/rent) (47 comments)
- Cost of living crisis – increasing cost of energy / materials (19 comments)
- Lack of investment vs ageing crown assets (7 comments)
- Environmental impacts on sea bed vs fishing (dredge/fish farming) (7 comments)
- Impact of rising costs on membership levels (5 comments)
- Overcrowding / Disposal of abandoned moorings (5 comments)

### 3.7 Managing Agents

84% of respondents indicated that they deal with Managing Agents, with the vast majority indicating that Bidwells was the Managing Agent that they deal with.

These tenants were then asked to **rate the agents** (on a scale of 1 to 10, where one is very poor and 10 is excellent) across a range of indicators in relation to the service they provided. The following table illustrates the mean scores.

	Mean Score 2023	Mean Score 2019	Mean Score 2017
Clarity and openness	6.9	7.8	7.0
Understanding your needs	6.2	7.6	6.7
Quality of Communication	7.1	7.7	7.0
Efficiency	6.6	7.7	6.9
Responsiveness	6.7	7.7	6.9
Professionalism	7.2	8.1	7.4
Overall Performance	6.7	7.6	6.9

Positive sentiment was currently highest in relation to:

- Professionalism
- Quality of communication

Positive sentiment was currently lowest in relation to

- Understanding tenant needs

Satisfaction levels are slightly down on all indicators since the 2019 survey. Understanding tenant needs consistently scores the lowest across the three surveys.

When asked for comments on the Managing Agents, 38 responses were received. Comments were largely positive, with comments reaffirming respondents' positive sentiment (22 comments). A number of comments that identified service improvements included:

- Improve response time to queries (2 comments)
- Improve accuracy on bills (2 comments)

When asked how Crown Estate Scotland could improve the service provided through the Managing Agents, the following themes emerged following an analysis of the ninety three comments provided. The most cited themes to emerge included:

- Better Communication / More face-to-face opportunities to meet (10 comments)
- Demonstrate value for money and explain cost (8 comments)
- Don't need an agency – Crown Estate Scotland do it directly especially if they are just raising invoices (5 comments)
- More timely responses to queries / problems (5 comments)

Respondents were further asked whether they **felt the level of service they received from the Managing Agent had changed in the last two years.**

Much Better	2%
Better	7%
Same	90%
Worse	2%
Much Worse	0

The majority of respondents indicated that they believed the level of service to be the same (90%). 11% indicated they felt it was better. In contrast 2% indicated they felt it was worse.

### **3.8 Additional comments**

As a final question on the survey form, respondents were asked if they had any additional comments they would like to make. Forty-nine responses were received.

Most of the comments related to:

- respondents had little direct contact with Crown Estate Scotland other than to pay the annual fees/rent. As a result, they didn't feel that Crown Estate Scotland offered any type of service (7 comments)
- discontent with the recent increase in fees (7 comments)

Some interviewees commented that Crown Estate Scotland had improved communications over the last two years (3 comments) and were working more with coastal communities to reinvest in local projects through the offer of funding local projects (3 comments).



## 4. Agriculture tenants

### 4.1 Introduction

The survey was sent to 169 agricultural tenants. A total of 45 completed interviews were achieved representing a response rate of 27%.

The survey accuracy (margin of error) is +/- 12.5% based on a 50% estimate at the 95% confidence interval. This means that in 19 cases out of 20, a percentage result of 50% obtained from a single representative sample of 45 would reflect a true value – the value obtained by interviewing everyone in the target audience – of between 37.5% and 62.5%, with the most likely value being 50% itself.

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 whole.

It should be noted that the previous research reports (2017 and 2020) combined the views of agriculture tenants with the views of residential tenants into an aggregated summary report which presented the combined survey results as the views of 'rural' tenants. The raw survey data from the previous surveys undertaken (2017 and 2020) was not available to facilitate direct comparison with the current data collected for agriculture tenants.

It was, however, possible to determine from the previous report in 2020 that the majority of respondents (61 from 103 completed interviews) were Agricultural tenants, with 58 out of 83 responses for the 2017 survey being from agricultural tenants. Whilst not directly comparable we have highlighted the current Agriculture tenant scores set alongside the 'Rural tenant' survey scores from the previous surveys (2017 and 2020) to illustrate the direction of travel

The response rate to the 2019 rural survey was 47% and 34% for the 2017 survey, suggesting response rates are lower for this survey.

### 4.2 Awareness and Perceptions

Respondents were initially asked about **how knowledgeable they felt they were about Crown Estate Scotland**. 66% felt they were aware, and quite knowledgeable about the organisation.

It can be seen that in 2020, 59% of respondents indicated that they were quite (46%) or very (13%) knowledgeable about the organisation.

	2023 Agriculture Score	2020 Rural combined score	2017 Rural combined score
Very knowledgeable about Crown Estate Scotland	2%	13%	7%
Quite knowledgeable about Crown Estate Scotland	66%	46%	58%
Aware but not very knowledgeable about Crown Estate Scotland	27%	36%	30%
Have little knowledge of Crown Estate Scotland	5%	5%	4%
Have no knowledge of Crown Estate Scotland	0%	1%	1%

27% indicated that they were aware, but not very knowledgeable about Crown Estate Scotland.

#### 4.3 Service and Communications

Respondents were asked how they rate Crown Estate Scotland across a range of brand metrics on a scale of 1-10, where 1 was very poor and 10 was excellent.

Positive sentiment is highest for:

- Professionalism
- Clarity and openness

Positive sentiment is lowest for:

- Understanding your needs
- Efficiency

We present the data showcasing the percentage who provided a positive sentiment rating of seven or more, providing comparisons with the previous survey results for 'rural tenants'. It should be noted that the metric 'Professionalism' was not asked in the previous 2020 or 2017 surveys. Therefore, no comparison data is available for this metric.

	2023 Agriculture Positive Sentiment	2020 Rural combined score	2017 Rural combined score
Clarity and openness	53%	59%	52%
Understanding your needs	41%	54%	47%
Quality of Communication	51%	56%	56%
Efficiency	38%	55%	52%
Responsiveness	48%	57%	46%
Professionalism	66%	n/a	n/a
Overall Performance	48%	56%	53%

It can be seen that positive sentiment has decreased 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 to 10 where 1 was very negatively and 10 was very positively).

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
2%	2%	0%	7%	14%	5%	14%	27%	9%	20%	0

70% of the respondents provided a rating of 7 or more, indicating a positive sentiment towards the organisation. The current mean score for agriculture tenants is 7.3. The mean score for rural tenants in 2020 was 7.2 and 6.8 for rural tenants in 2017.

#### 4.4 Contact and Communications

Respondents were asked how they felt about the information they received directly from Crown Estate Scotland. When asked to **rate the usefulness of the information they received** (on a scale of 1 to 10 where 1 was not at all useful and 10 was very useful), respondents were largely positive.

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
5%	0%	2%	7%	11%	16%	20%	16%	7%	16%	

59% of the respondents provided a rating of 7 or more, indicating they felt the information received was useful. 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.

When asked if they wished to make any additional comment on their response given with regard to the usefulness of information, sixteen responses were received. The most commonly cited responses included:

- Communication is clear and timely (2 comments)
- Don't get much information (2 comments)
- Most information does not apply to me (2 comments)
- Too many buzz words (1 comment)

Respondents were then asked to rate **how easy it is to understand the information** received from Crown Estate Scotland (on a scale of 1 to 10 where 1 was not all easy and 10 was very easy).

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
2%	2%	2%	2%	5%	7%	23%	21%	14%	21%	

79% of the respondents provided a rating of 7 or more, indicating they felt the information received was easy to understand. The current mean score for Agriculture tenants is 7.5. Rural tenants had a mean score of 7.2 in both the 2020 and 2017 surveys.

When asked if they wished to make any additional comment on their response given with regard to how easy the information is to understand, sixteen responses were provided. The most commonly cited responses included:

- More face-to-face meetings would be good (4 comments)
- Always clear and well presented (4 comments)
- Recent improvements in written communication (2 comments)

- New Farm tenant meetings are a great idea (1 comment)

Respondents were asked to provide comments on what key things they would like to hear about from Crown Estate Scotland. The most cited themes to emerge included:

Key things you would like to hear about	No of respondents	Illustrative Comments
Future direction / vision	6 comments	The future of farm tenancies Clear guidance on future strategy and policy concerning farm sales Any changes in policy
Specific information relevant to us	3 comments	Things that affect the estate we are on
Financial/ information	3 comments	How and when I can buy my field How my rent is set
Planned repairs / reinvestment	3 comments	Would like to hear about their plans to maintain/upkeep their properties
How can CES help us?	3 comments	More on how they can support us to get projects off the ground How they intend to support us over the next 10 years
Performance	2 comments	Appraisal of tenants should focus on what we are achieving

Respondents were asked **how they would like Crown Estate Scotland to communicate with them**. 51% indicated that they would like information to be sent by email, this is a notable increase since previous surveys.

	2023 Agriculture tenants Score	2020 Rural combined score	2017 Rural combined score
Letter	44%	68%	81%
Email	51%	33%	30%
Other (please write in below)	5%	11%	0%

5% indicated that they would prefer to be contacted by phone.

Respondents were then asked **if the frequency of contact was appropriate and met their needs**. The majority of respondents indicated that the frequency of contact was appropriate (83%).

	2023 Agriculture tenants Score	2020 Rural combined score	2017 Rural combined score
Yes	83%	71%	72%
No	17%	29%	28%

Where respondents indicated that communication did not meet their needs, they were asked to explain how things could be improved. Six responses were received, the most commonly cited responses related to

- More regular face to face meetings (3 comments)
- Better understanding of tenant activities (2 comments)

Respondents were asked to rate **to what extent they would say that Crown Estate Scotland (including its Managing Agents) worked in partnership with them** (on a scale of 1 to 10 where 1 was not at all and 10 was extensively).

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
7%	5%	5%	5%	14%	16%	16%	12%	16%	0	5%

44% of the respondents provided a rating of 7 or more. 22% provided a rating of 4 or less. The mean score is 5.7. It should be noted that this question was not asked in previous 2020 or 2017 rural surveys.

#### 4.5 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, the following perceptions emerged.

We present the data showcasing the percentage who provided a positive sentiment rating of seven or more, providing comparisons with the previous survey results for 'rural tenants'

	2023 Agriculture tenants Score	2020 Rural combined score	2017 Rural combined score
Understanding of how rents are set	47%	51%	41%
Ease of rent payment arrangements	79%	76%	81%
Value for money	55%	54%	50%

Satisfaction was highest for ease of rent payment arrangements, with 79% expressing a rating of 7 or more. Satisfaction was lowest in relation to understanding how rent levels are set. This is a similar trend to that in the previous surveys.

Respondents were then provided with an opportunity to provide additional comments relating to their views on rents and value for money. Of the sixteen responses received, the most commonly cited comments related to:

- Concern over how rents are calculated (6 comments)
- No consideration given to quality of farmland when setting rent (3 comments)
- Delays in fixing outstanding repairs (3 comments)

#### 4.6 Overall Satisfaction

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.

1	2	3	4	5	6	7	8	9	10	Don't know
2%	0	0	7%	9%	9%	27%	16%	14%	14%	2%

73% of respondents provided a rating of 7 or more indicating they were satisfied with the service provided by Crown Estate Scotland. This compares to 9% who expressed dissatisfaction with a rating of 4 or less. The mean score is 7.1. The mean score for rural tenants in 2020 was 7.0 and 6.7 in 2017.

Respondents were free to add any additional comments they had on their view relating to overall service. Of the ten comments received, the most common themes related to:

- Repairs and maintenance can be protracted (3 comments)
- Better since Crown Estate Scotland started actively looking at what the Managing Agents are doing (2 comments)
- Better agricultural representation on the Board (1 comment)

Respondents were further asked **whether they felt the level of service they received from Crown Estate Scotland had changed in the last two years.**

Much Better	12%
Better	26%
Same	50%
Worse	10%
Much Worse	2%

38% of respondents indicated they felt the level of service was better. In contrast 12% indicated they felt it was worse.

When asked to comment further, sixteen comments were received. Where respondents felt the service was worse, comments focused on:

- Managing Agents not being responsive (4 comments)
- Slow repairs and maintenance (2 comments)

Where respondents believed the service to have improved, comments related to:

- Communication with Crown Estate Scotland has improved (2 comment)
- Face to face meetings with Crown Estate Scotland (1 comment)
- New Managing Agents better than previous agents (1 comment)

Respondents were asked to comment on **how they would like Crown Estate Scotland to improve the service it provides directly to agricultural tenants.** Twenty-four comments were received. The most commonly cited themes to emerge were:

- Are Managing Agents providing value for money (3 comments)
- Faster repairs and maintenance service (3 comments)
- More regular face to face meetings (2 comments)
- More visibility from Crown Estate Scotland staff (2 comments)

Interviewees were then asked, **thinking broadly about what impacts on you/your business, what are your key concerns in the short term (ie the next 2 to 3 years)?**



Twenty-nine responses were received from respondents. Analysis of the opened ended statements identified the following key themes:

- Uncertain economic conditions (5 comments)
- Increasing costs of production (5 comments)
- Cost of living / inflation exceeding income levels (4 comments)
- Repairs and maintenance slow (4 comments)
- Security of lease (3 comments)

#### 4.7 Managing Agents

98% of respondents indicated that they deal with Managing Agents, with the vast majority indicating that Strutt and Parker was the Managing Agent that they deal with.

These tenants were then asked to rate the agents (on a scale of 1 to 10, where one is very poor and 10 is excellent) across a range of indicators in relation to the service they provided. We present the data showcasing the percentage who provided a positive sentiment rating of seven or more.

	2023 Agriculture tenants Score	2020 Rural combined score	2017 Rural combined score
Clarity and openness	56%	51%	45%
Understanding your needs	58%	54%	44%
Quality of Communication	46%	55%	46%
Efficiency	39%	55%	38%
Responsiveness	37%	55%	38%
Professionalism	64%	63%	59%
Overall Performance	54%	56%	45%

Positive sentiment is highest for:

- Professionalism
- Understanding tenant needs
- Clarity and openness

Positive sentiment is lowest for:

- Efficiency
- Responsiveness

These are both notably poorer than the 2020 survey.

When asked how Crown Estate Scotland could improve the service provided through the Managing Agents, nineteen comments were received. The most cited themes to emerge included:

- Strutt and Parker much better than previous agents (6 comments)
- Managing Agent is understaffed (6 comments) (Strutt & Parker)
- Requirement for three quotes slows down repairs and maintenance (3 comments)

Respondents were further asked **whether they felt the level of service they received from the Managing Agent had changed in the last two years.**

Much Better	7%
Better	29%
Same	46%
Worse	15%
Much Worse	2%

36% indicated they felt the service was better. In contrast 17% indicated they felt it was worse, while 46% believed the level of service to be the same.

#### 4.8 Additional comments

As a final question on the survey form, respondents were asked if they had **any additional comments they would like to add.** Twelve comments were received which primarily focused on a requirement for improved communication with the Managing Agent (4 comments) and a more responsive repairs and maintenance service (3 comments).

## 5. Fishing tenants

### 5.1 Introduction

The survey was sent to 115 Fishing tenants. The sample comprised of:

- Salmon Fishing Tenants
- Estate Fisheries
- Forth Salmon Fishing

A total of 33 completed interviews were achieved representing a response rate of 28%.

The survey accuracy (margin of error) is +/- 14.5% based on a 50% estimate at the 95% confidence interval. This means that in 19 cases out of 20, a percentage result of 50% obtained from a single representative sample of 33 would reflect a true value – the value obtained by interviewing everyone in the target audience – of between 35.5% and 64.5%, with the most likely value being 50% itself.

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 whole.

A survey of Salmon Fishing Tenants only was previously undertaken in 2019.

The 2023 data is not directly comparable with the previous survey as the current survey also included Forth and Estate Fishing. This said, Forth and Estate fishing only accounts for 8 of the 33 responses received. Whilst not directly comparable, we have presented the results from the 2023 survey of Fishing tenants with the 2019 results from Salmon Fishing tenants (where comparable data exists) to illustrate the direction of travel since the previous research.

The response rate to the 2019 survey was 52% highlighting that the response rate is down for this survey.

## 5.2 Awareness and Perceptions

Respondents were initially asked about how knowledgeable they felt they were about Crown Estate Scotland. 34% felt they were aware, and quite knowledgeable about the organisation.

	2023 Fishing Tenants Score	2019 Salmon Fishing Score
Very knowledgeable about Crown Estate Scotland	3%	3%
Quite knowledgeable about Crown Estate Scotland	34%	32%
Aware but not very knowledgeable about Crown Estate Scotland	53%	52%
Have little knowledge of Crown Estate Scotland	9%	12%
Have no knowledge of Crown Estate Scotland	0%	2%

53% indicated that they were aware, but not very knowledgeable about Crown Estate Scotland. This is a similar trend to the survey results from 2019.

## 5.3 Service and Communications

Respondents were asked **how they rate Crown Estate Scotland across a range of brand metrics** on a scale of 1-10, where 1 was very poor and 10 was excellent. This was a new question added into the 2023 survey, to ensure consistency across the surveys, and as a result no comparison data is available. We present the data showcasing the percentage who provided a positive sentiment rating of seven or more.

	Positive Sentiment Fishing Tenants 2023
Clarity and openness	63%
Understanding your needs	57%
Quality of Communication	69%
Efficiency	63%

Responsiveness	60%
Professionalism	76%
Overall Performance	63%

Positive sentiment is highest for:

- Professionalism
- Quality of communication

Positive sentiment is lowest for:

- Understanding your needs

Respondents were then asked **how they would speak about Crown Estate Scotland to others** (on a scale of 1 to 10 where 1 was very negatively and 10 was very positively).

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
0%	3%	6%	9%	12%	12%	12%	18%	15%	12%	0

57% of the respondents provided a rating of 7 or more, indicating a positive sentiment towards the organisation. The current mean score is 6.8. The mean score for Salmon Fishing tenants in 2019 was 5.6.

#### 5.4 Contact and Communications

Respondents were then asked how they felt about the information they received directly from Crown Estate Scotland. When asked to rate **the usefulness of the information** they received (on a scale of 1 to 10 where 1 was not at all useful and 10 was very useful), respondents were largely positive.

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
0%	3%	6%	10%	16%	3%	10%	16%	16%	10%	3%

52% of the respondents provided a rating of 7 or more, indicating they felt the information received was useful. The current mean score is 6.0. The mean score for Salmon fishing tenants in 2019 was 5.6.

When asked if they wished to make any additional comment on their response given with regard to the usefulness of information, seventeen responses were received. The most cited responses included:

- Don't get much direct information (4 comments)
- Communication is clear and timely (2 comments)
- Main communication is typically a request for payment (2 comments)

Respondents were then asked to rate **how easy it is to understand the information received** from Crown Estate Scotland (on a scale of 1 to 10 where 1 was not all easy and 10 was very easy).

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
0	0	3%	6%	13%	13%	0	23%	23%	16%	1%

62% of the respondents provided a rating of 7 or more, indicating they felt the information received was easy to understand. The current mean score is 7.2. The mean score for Salmon Fishing tenants in 2019 was 7.1.

When asked if they wished to make any additional comment on their response given with regard to how easy the information is to understand, eleven responses were received. The most commonly cited responses included:

- Always clear and well presented (5 comments)
- Difficult to get a face-to-face meeting (2 comments)
- Legal documents are too convoluted e.g. leases (2 comments)

Respondents were asked to provide comments on what **key things they would like to hear about from Crown Estate Scotland**. The most cited themes to emerge included:

Key things you would like to hear about	No of respondents	Illustrative Comments
Future direction / vision	4 comments	Views and plans for land management in Scotland Sustainability of Salmon Fishing Where does the money go – annual report
Specific information relevant to us	4 comments	What are you doing to improve salmon stocks Information relevant to salmon fishing Approaches to landscape/coastal/inter tidal restoration Approaches to help wild salmon habitats
Financial/ information	3 comments	How leases will continue Information on rental changes Information on Funding assistance

Respondents were asked **how they would like Crown Estate Scotland to communicate with them**. This was a new question added into the survey, to ensure consistency across the surveys, and as a result no comparison data is available. 68% indicated that they would like information to be sent by email.

	Fishing Tenants 2023
Letter	29%
Email	68%
Other (please write in below)	4%

Respondents were then asked if the **frequency of contact was appropriate and met their needs**. The majority of respondents indicated that the frequency of contact was appropriate (90%).

	Fishing Tenants 2023
Yes	90%
No	10%

Where respondents indicated that communication did not meet their needs, they were asked to explain how things could be improved. Three comments were received, as follows:

- More regular face to face meetings
- Tone of communication from agent should be more collaborative
- Almost no contact

Respondents were asked to rate **to what extent they would say that Crown Estate Scotland (including its Managing Agents) worked in partnership with them** (on a scale of 1 to 10 where 1 was not at all and 10 was extensively).

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
3%	0	10%	13%	0	13%	16%	13%	10%	10%	13%

49% of the respondents provided a rating of 7 or more. 26% provided a rating of 4 or less. The mean score is 5.6.

### 5.5 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, the following perceptions emerged. We present the data showcasing the percentage who provided a positive sentiment rating of seven or more.

	Fishing Tenants 2023	2019 Salmon Fishing Score
Understanding of how rents are set	46%	20%
Ease of rent payment arrangements	84%	70%
Value for money	53%	15%

Satisfaction was highest for ease of rent payment arrangements, with 84% expressing a rating of 7 or more. Satisfaction was lowest in relation to understanding how rent levels are set. The same pattern can be seen in the 2019 survey results. Although it is notable that satisfaction levels have significantly improved since the 2019 survey.



Respondents were then provided with an opportunity to provide additional comments relating to their views on rents and value for money. Thirteen comments were received. The most common themes related to:

- Concern over how rents are calculated (4 comments)
- Diminishing stock makes the rents look high (3 comments)
- No help with the maintenance of the beat (3 comments)

## 5.6 Overall Satisfaction

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.

1	2	3	4	5	6	7	8	9	10	Don't know
3%	0	13%	3%	13%	6%	13%	19%	19%	10%	0

61% of respondent indicated that overall, they were satisfied, providing a rating of 7 or more with the service provided by Crown Estate Scotland. This compares to 19% who expressed dissatisfaction with a rating of 4 or less. The mean score is 6.7. The mean score for Salmon Fishing Tenants in 2019 was 5.7.

Respondents were free to add any additional comments they had on their view relating to overall service. Of the 6 comments provided, three suggested a need for a better face-to face presence.

Respondents were further asked whether they felt **the level of service they received from Crown Estate Scotland had changed in the last two years**. 81% indicated they felt the service was the same.

	Fishing Tenants 2023	2019 Salmon Fishing Score
Much Better	3%	2%
Better	10%	9%
Same	81%	73%
Worse	6%	14%
Much Worse	0	2%

13% of respondents indicated they felt the level of service was better. In contrast 6% indicated they felt it was worse. This is broadly the same pattern as 2019, however it should be noted that less respondents in 2023 stated that the service was worse.

Where respondents felt the service was worse, comments related to:

- Additional requirements to provide more detail to Crown Estate Scotland

Where respondents believed the service to have improved, comments related to:

- New Managing Agents more engaged with working with club.

Respondents were asked to comment on how they would like the service to improve. Thirteen comments were received, with the most common themes relating to:

- Provide one person as main contact (3 comments)
- More regular face to face meetings (eg twice a year) (3 comments)
- More clarity and support on grants process (3 comments)
- Set rents based on catch returns (1 comment)

Interviewees were then asked, **thinking broadly about what impacts on you/your business, what are your key concerns in the short term (ie the next 2 to 3 years)?**

Twenty comments were received. Analysis of the opened ended statements provided by respondents identified the following key themes:

- Salmon levels are in serious decline ( 8 comments)
- Water quality and river management affecting catches (5 comments)
- Increasing rent vs reducing club membership and revenues (4 comments)
- Declining membership (3 comments)
- Uncertain economic conditions/cost of living crisis affecting membership (2 comments)

## 5.7 Managing Agents

84% of respondents indicated that they deal with Managing Agents, with the vast majority indicating that Savills was the Managing Agent that they deal with.

These tenants were then asked to rate the agents (on a scale of 1 to 10, where one is very poor and 10 is excellent) across a range of indicators in relation to the service they provided. We present the data highlighting the percentage who provided a positive sentiment rating of seven or more.

	Fishing Tenants Positive Sentiment 2023	Salmon Fishing Tenants 2019 scores
Clarity and openness	72%	61%
Understanding your needs	60%	48%
Quality of Communication	72%	60%
Efficiency	72%	62%
Responsiveness	64%	62%
Professionalism	72%	67%
Overall Performance	68%	59%

This shows improvement since the previous survey in all areas. Positive sentiment is highest for:

- Clarity and openness
- Quality of communication
- Efficiency
- Professionalism

Positive sentiment is lowest for:

- Responsiveness
- Understanding tenant needs

When asked **how Crown Estate Scotland could improve the service provided through the Managing Agents**, five comments were received. The most cited theme to emerge was:

- Limited or no contact with Agents (2 comments)

Respondents were further asked **whether they felt the level of service they received from the Managing Agent had changed in the last two years.**

Much Better	0%
Better	4%
Same	90%
Worse	0%
Much Worse	4%

The majority of respondents believed the level of service to be same (90%).

### 5.8 Additional comments

As a final question on the survey form, respondents were asked if they had any additional comments they would like to add.

Seven comments were received, which primarily related to concerns over the sustainability of fishing given declining levels of stock. (3 comments)

Other comments received related to purchasing the fishing rights or donating the rights back to the community (2 comments)

## 6. Residential tenants

### 6.1 Introduction

The survey was sent to 55 Residential tenants. A total of 25 completed interviews were achieved representing a response rate of 45%.

The survey accuracy (margin of error) is +/- 14.6% based on a 50% estimate at the 95% confidence interval. This means that in 19 cases out of 20, a percentage result of 50% obtained from a single representative sample of 25 would reflect a true value – the value obtained by interviewing everyone in the target audience – of between 35.4% and 64.6%, with the most likely value being 50% itself.

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 whole.

It should be noted that the previous research reports (2019 and 2017) combined the views of both agriculture tenants with the views of residential tenants into an aggregated summary report which presented the combined survey results as the views of ‘rural’ tenants. The majority of respondents in both reports were agricultural and, on that basis, it is not considered that the previous reports can be used for comparison purposes. The raw survey data from the previous surveys undertaken was not available to facilitate direct comparison with the current data collected for residential tenants.

### 6.2 Awareness and Perceptions

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

	2023 Score
Very knowledgeable about Crown Estate Scotland	4%
Quite knowledgeable about Crown Estate Scotland	38%
Aware but not very knowledgeable about Crown Estate Scotland	54%
Have little knowledge of Crown Estate Scotland	4%
Have no knowledge of Crown Estate Scotland	0%

54% indicated that they were aware, but not very knowledgeable about Crown Estate Scotland. 38% felt they were aware, and quite knowledgeable about the organisation.

### 6.3 Service and Communications

Respondents were asked **how they rate Crown Estate Scotland across a range of brand metrics** on a scale of 1-10, where 1 was very poor and 10 was excellent. We present the data showcasing the percentage who provided a positive sentiment rating of seven or more.

	Positive Sentiment 2023
Clarity and openness	24%
Understanding your needs	25%
Quality of Communication	30%
Efficiency	21%
Responsiveness	25%
Professionalism	50%
Overall Performance	37%

Positive sentiment is highest for:

- Professionalism

Positive sentiment is lowest for:

- Clarity and openness
- Efficiency

Respondents were then asked **how they would speak about Crown Estate Scotland to others** (on a scale of 1 to 10 where 1 was very negatively and 10 was very positively).

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
8%	4%	4%	4%	12%	28%	16%	8%	4%	8%	4%

36% of the respondents provided a rating of 7 or more, indicating a positive sentiment towards the organisation. The mean score is 5.6.

#### 6.4 Contact and Communications

Respondents were then asked how they felt about the information they received directly from Crown Estate Scotland. When asked to **rate the usefulness of the information** they received (on a scale of 1 to 10 where 1 was not at all useful and 10 was very useful), respondents were largely positive with 32% providing a rating of 7.

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
4%	4%	8%	4%	16%	12%	32%	8%	4%	4%	4%

48% of the respondents provided a rating of 7 or more, indicating they felt the information received was useful. The mean score is 5.7.

When asked if they wished to make any additional comment on their response given with regard to the usefulness of information, the most cited responses included:

- Most communication is not relevant to us – mostly about farms (4 comments)
- Communication is mostly invoices (2 comments)

Respondents were then asked to **rate how easy it is to understand the information received** from Crown Estate Scotland (on a scale of 1 to 10 where 1 was not all easy and 10 was very easy).

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
4%	0	0	0	12%	16%	16%	16%	8%	24%	4%

64% of the respondents provided a rating of 7 or more, indicating they felt the information received was easy to understand. The mean score is 7.1

When asked if they wished to make any additional comment on their response given with regard to how easy the information is to understand, twelve comments were received. The most commonly cited responses included:

- Difficult to get a face-to-face meeting/speak to agent (2 comments)
- More opportunities for personal meetings (2 comments)
- Make info more relevant – not just about farms (2 comments)

Respondents were asked to provide comments on **what key things they would like to hear about from Crown Estate Scotland**. The most cited themes to emerge included:

Key things you would like to hear about	No of respondents	Illustrative Comments
Future direction / vision	4 comments	Future priorities Landlord responsibilities Making properties more environmentally friendly /energy efficient
Specific information relevant to us	3 comments	Local information that might affect our tenancy Matters pertinent to long standing tenants What's happening on the estate
Maintenance of properties	3 comments	When promised repairs will be completed More responsive repairs service How long repairs should take

Respondents were asked **how they would like Crown Estate Scotland to communicate with them**. 60% indicated that they would like information to be sent by letter.

	2023 Score
Letter	60%
Email	36%
Other (please write in below)	4%



Respondents were then asked **if the frequency of contact was appropriate and met their needs**. The majority of respondents indicated that the frequency of contact was appropriate (68%).

	2023 Score
Yes	68%
No	32%

Where respondents indicated that communication did not meet their needs, they were asked to explain how things could be improved. Five comments were received. The most commonly cited responses related to

- Agent not responsive – very little communication (Strutt & Parker) (2 comments)
- Long wait times for works to be undertaken (2 comments)

Respondents were asked to rate **to what extent they would say that Crown Estate Scotland (including its Managing Agents) worked in partnership with them** (on a scale of 1 to 10 where 1 was not at all and 10 was extensively).

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
4%	13%	0	9%	17%	17%	9%	17%	0	9%	4%

35% of the respondents provided a rating of 7 or more. 26% provided a rating of 4 or less. The mean score is 5.4.

## 6.5 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, the following perceptions emerged.

We present the data showcasing the percentage who provided a positive sentiment rating of seven or more.

	2023 Score
Understanding of how rents are set	36%
Ease of rent payment arrangements	68%
Value for money	48%

Satisfaction was highest for ease of rent payment arrangements, with 68% expressing a rating of 7 or more. Satisfaction was lowest in relation to understanding how rent levels are set.

Respondents were then provided with an opportunity to provide additional comments relating to their views on rents and value for money. Eight comments were received. The most cited comments related to:

- Concern over speed of repair work (3 comments)
- Quality of property compared to rent levels (2 comments)
- Rent too high compared to alternatives (2 comments)

## 6.6 Overall Satisfaction

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.

1	2	3	4	5	6	7	8	9	10	Don't know
4%	8%	4%	4%	17%	17%	25%	17%	0	4%	0

46% of respondent indicated that overall, they were satisfied providing a rating of 7 or more with the service provided by Crown Estate Scotland. This compares to 20% who expressed dissatisfaction with a rating of 4 or less. The mean score is 5.8.

Respondents were free to add any additional comments they had on their view relating to overall service. Of the 7 comments provided, the majority expressed concerns over long wait times to have repair works carried out (5 comments).

Respondents were further asked **whether they felt the level of service they received from Crown Estate Scotland had changed in the last two years**. 67% indicated they felt the service was the same.

Much Better	0
Better	4%
Same	67%
Worse	13%
Much Worse	17%

4% of respondents indicated they felt the level of service was better. In contrast 30% indicated they felt it was worse.

Where respondents felt the service was worse, seven comments were received which related to:

- Frustration over waiting times for repairs work to be carried out (4 comments)
- Lack of contact from the Managing Agent (2 comments)

Respondents were asked to comment on **how they would like Crown Estate Scotland to improve the service it provides directly to residential tenants**. Of the twelve comments provided, the most commonly cited themes to emerge were:

- Better turnaround times for repairs (5 comments)
- Managing Agent to be responsive to requests (4 comments) (Strutt & Parker)
- Change Agents (2 comments) (Strutt & Parker)

Interviewees were then asked, thinking broadly about what impacts on you/your business, what are your **key concerns in the short term (ie the next 2 to 3 years)?**

Twelve comments were received. Analysis of the opened ended statements identified the following key themes:

- No urgency undertaking repairs to property (4 comments)
- Rent increases while quality of property deteriorates (3 comments)
- High running costs of property (3 comments)
- Poor energy efficiency of property / high heating cost (2 comments)

## 6.7 Managing Agents

100% of respondents indicated that they deal with Managing Agents, with the vast majority indicating that Strutt and Parker was the Managing Agent that they deal with.

These tenants were then asked to **rate the agents** (on a scale of 1 to 10, where one is very poor and 10 is excellent) across a range of indicators in relation to the service they provided.

We present the data showcasing the percentage who provided a positive sentiment rating of seven or more.

	Positive Sentiment 2022
Clarity and openness	47%
Understanding your needs	48%
Quality of Communication	35%
Efficiency	26%
Responsiveness	26%
Professionalism	50%
Overall Performance	39%

Positive sentiment is highest for:

- Professionalism

Positive sentiment is lowest for:

- Responsiveness
- Efficiency

When asked **how Crown Estate Scotland could improve the service provided through the Managing Agents**, the following themes emerged following an analysis of comments provided. Of the twelve comments received, the most cited themes to emerge included:

- Managing Agent is slow at responding (5 comments) (Strutt & Parker)
- Limited or no action from Agents (4 comments) (Strutt & Parker)

Respondents were further asked **whether they felt the level of service they received from the Managing Agent had changed in the last two years**. 60% of respondents considered the level of service to be same.

28% believed it to be worse. In contrast 12% considered it to be better.

Much Better	4%
Better	8%
Same	60%
Worse	12%
Much Worse	16%

### 6.8 Additional comments

As a final question on the survey form, respondents were asked if they had any additional comments they would like to add.

Eight comments were received, which primarily related to concerns over the responsiveness of the Agents (4 comments) and long wait times to action any repairs (3 comments).

Other comments received related to the need for a maintenance plan to put in place for properties with a pro-active schedule of works.

## 7. Other tenants

### 7.1 Introduction

The survey was sent to 55 'Other' tenants. The groups consisted of:

- Sporting tenancies including shooting and stalking tenancies
- Recreation site tenants including bowling greens, cricket grounds, clay pigeon tenancies, nature reserves, public parks, car parks, community gardens, bike trails, livery and wig wam sites.
- Industrial tenancies including storage, boat building, craft units, waste transfer, recycling and cold store sites.
- Minerals & Mines Royal tenants including operating tenants & those with option agreements
- Other commercial properties including tenants of a city centre retail office building
- Miscellaneous tenants which included woodland and general purpose buildings

A total of 17 completed interviews were achieved representing a response rate of 31%

Respondents included:

- 1 commercial tenant
- 2 Mines royal tenants
- 7 Sporting tenancies tenants
- 4 Recreation site tenancies
- 3 Industrial tenancies

No miscellaneous tenants responded to the survey.

In line with the Market Research Society Code of Conduct, in preparing the 'Other tenants' category these smaller tenant groups have been aggregated to protect their confidentiality when reporting small sub-groups.

The survey accuracy (margin of error) is +/- 19.9% based on a 50% estimate at the 95% confidence interval. This means that in 19 cases out of 20, a percentage result of 50% obtained from a single representative sample of 17 would reflect a true value – the value obtained by interviewing everyone in the target audience – of between 30.1% and 69.9%, with the most likely value being 50% itself.

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 whole. The lower the margin of error, the more confident you can be that your survey reflects the views of all people in the subgroup.

Mines Royal and commercial tenants were surveyed in 2019, however because the 'Other' tenants have been aggregated as one tenant group for this survey, it is not possible to compare with the previous survey data.

## 7.2 Awareness and Perceptions

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

	2023 Score
Very knowledgeable about Crown Estate Scotland	0
Quite knowledgeable about Crown Estate Scotland	44%
Aware but not very knowledgeable about Crown Estate Scotland	56%
Have little knowledge of Crown Estate Scotland	0
Have no knowledge of Crown Estate Scotland	0

56% indicated that they felt they were aware, but not very knowledgeable about Crown Estate Scotland. 44% felt they were aware, and quite knowledgeable about the organisation.

## 7.3 Service and Communications

Respondents were asked **how they rate Crown Estate Scotland across a range of brand metrics** on a scale of 1-10, where 1 was very poor and 10 was excellent. We present the data showcasing the percentage who provided a positive sentiment rating of seven or more.

	Positive Sentiment 2023
Clarity and openness	47%
Understanding your needs	50%

Quality of Communication	50%
Efficiency	57%
Responsiveness	56%
Professionalism	75%
Overall Performance	63%

Positive sentiment is highest for:

- Professionalism

Positive sentiment is lowest for:

- Clarity and openness
- Understanding your needs
- Quality of communication

Respondents were then asked **how they would speak about Crown Estate Scotland to others** (on a scale of 1 to 10 where 1 was very negatively and 10 was very positively).

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
0%	0%	13%	0%	13%	13%	13%	19%	6%	25%	0

63% of the respondents provided a rating of 7 or more, indicating a positive sentiment towards the organisation. The mean score is 7.2.

#### 7.4 Contact and Communications

Respondents were then asked how they felt about the information they received directly from Crown Estate Scotland. When asked to rate **the usefulness of the information they received** (on a scale of 1 to 10 where 1 was not at all useful and 10 was very useful).



The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
0%	6%	6%	0%	0%	13%	25%	13%	13%	13%	6%

Respondents were largely positive with 64% providing a rating of 7 or more. In contrast 12% provided a rating of 4 or less. The mean score is 6.2.

When asked if they wished to make any additional comment regarding the usefulness of information, seven comments were received. The most commonly cited responses included:

- Most communication is not relevant to us – mostly about farms (3 comments)
- Communication is mostly invoices (1 comments)
- More information on when leases or farms are to be sold (1 comment)

Respondents were then asked to rate **how easy it is to understand the information received** from Crown Estate Scotland (on a scale of 1 to 10 where 1 was not all easy and 10 was very easy). The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
0%	0%	0%	7%	7%	7%	7%	27%	0	47%	0

81% of the respondents provided a rating of 7 or more, indicating they felt the information received was easy to understand. The mean score is 8.3.

When asked if they wished to make any additional comment on how easy information is to understand, eight responses were received. The most commonly cited responses included:

- Information received is adequate and concise (2 comments)
- More face-to-face meetings (1 comment)
- Provide quarterly updates on the work of Crown Estate Scotland (1 comment)

Respondents were asked to provide comments on **what key things they would like to hear about from Crown Estate Scotland**. The most cited themes to emerge included:

Key things you would like to hear about	No of respondents	Illustrative Comments
Future direction / vision	3 comments	Vision for future Who's who, and overview of work done by Crown Estate Scotland Development plans
Specific information relevant to us	3 comments	Longer lead in times to discuss continuing lease
Funding	3 comments	Grant Schemes Support/ funding opportunities
Maintenance of properties	2 comments	Maintenance of infrastructure

Respondents were asked **how they would like Crown Estate Scotland to communicate with them**. 73% indicated that they would like information to be sent by email.

	2023 Score
Letter	27%
Email	73%
Other (please write in below)	0

Respondents were then asked if the **frequency of contact was appropriate and met their needs**. The majority of respondents indicated that the frequency of contact was appropriate (75%).

	2023 Score
Yes	75%
No	25%

Where respondents indicated that communication did not meet their needs, they were asked to **explain how things could be improved**. Three comments were received in relation to Strutt & Parker, as follows:

- Agent not responsive – very little communication
- Agent is too far away
- Almost no personal contact

Respondents were asked to rate to what extent they **would say that Crown Estate Scotland (including its Managing Agents) worked in partnership with them** (on a scale of 1 to 10 where 1 was not at all and 10 was extensively).

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
6%	13%	0%	0%	0%	13%	25%	13%	19%	6%	6%

63% of the respondents provided a rating of 7 or more. 19% provided a rating of 4 or less. The mean score is 6.1.

### 7.5 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, the following perceptions emerged. We present the data outlining the percentage who provided a positive sentiment rating of seven or more.

	2023 Score
Understanding of how rents are set	38%
Ease of rent payment arrangements	81%
Value for money	63%

Satisfaction was highest for ease of rent payment arrangements, with 81% expressing a rating of 7 or more. Satisfaction was lowest in relation to understanding how rent levels are set.

Respondents were then provided with an opportunity to provide additional comments relating to their views on rents and value for money. Of the five comments provided, the main themes related to:

- Rent too high (2 comments)
- Unclear on how rents are set (2 comments)
- Good value (1 comment)

## 7. 6 Overall Satisfaction

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.

1	2	3	4	5	6	7	8	9	10	Don't know
0%	6%	13%	0	0	19%	13%	6%	13%	25%	6%

57% of respondent indicated that overall, they were satisfied providing a rating of 7 or more with the service provided by Crown Estate Scotland. This compares to 19% who expressed dissatisfaction with a rating of 4 or less. The mean score is 6.6. It is notable that 25% gave a rating of 10 for service.

Respondents were free to add any additional comments they had on their view relating to overall service. Of the 6 comments provided, the main theme was the lack of personal contact and slow response to undertake repairs.

Respondents were further asked whether they felt **the level of service they received from Crown Estate Scotland had changed in the last two years**. 69% indicated they felt the service was the same.

Much Better	13%
Better	0%
Same	69%
Worse	13%
Much Worse	6%

13% of respondents indicated they felt the level of service was better. In contrast 19% indicated they felt it was worse.

Interviewees were then asked, **thinking broadly about what impacts on you/your business, what are your key concerns in the short term (ie the next 2 to 3 years)?**

Analysis of the eleven comments provided identified the following key themes:

- Cost of energy (4 comments)
- Maintenance (3 comments)

- Costs going up membership getting older (1 comment)
- Managing Agent service is very poor (1 comment) (Strutt & Parker)
- Speed of response should be improved (1comment)
- More meetings in person (1 comment)
- Information on planned improvements in my area (1 comment)

## 7.7 Managing Agents

93% of respondents (15 respondents) indicated that they deal with Managing Agents, with the majority indicating that Strutt and Parker was the Managing Agent that they deal with (10 of the 15 respondents). One tenant deals with London & Scottish and 2 stated they deal with Wardell Armstrong. Two provided no response to the question.

These tenants were then asked to **rate the agents** (on a scale of 1 to 10, where one is very poor and 10 is excellent) across a range of indicators in relation to the service they provided.

We present the data outlining the percentage who provided a positive sentiment rating of seven or more.

	Positive Sentiment 2023
Clarity and openness	57%
Understanding your needs	57%
Quality of Communication	56%
Efficiency	56%
Responsiveness	56%
Professionalism	78%
Overall Performance	50%

Positive sentiment is highest for:

- Professionalism

Positive sentiment is lowest for:

- Overall performance

When asked how Crown Estate Scotland could **improve the service provided through the Managing Agents**, the following themes emerged following an analysis of the eight comments provided. Comments were polarized, as follows:

- Managing Agent (Strutt and Parker) is too far away / never see them (3 comments)
- Good relationship with the Agent / helpful (Strutt & Parker) (2 comments)

Respondents were further asked **whether they felt the level of service they received from the Managing Agent had changed in the last two years**.

Much Better	14%
Better	14%
Same	50%
Worse	7%
Much Worse	14%

50% of respondents considered the level of service to be the same. 28% felt the service was better, while 21% felt it was worse.

## 7.8 Additional comments

As a final question on the survey form, respondents were asked if they had any additional comments they would like to add.

Only three comments were received, with comments highlighting a supportive relationship with the Managing Agent (Wardell Armstrong) who were described as collaborative.

## 8. 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 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.

## Appendix 1:

### The Questionnaire

## Crown Estate Scotland Tenants Survey

### Please help us improve our service by completing our survey

Tenant feedback is vital in ensuring Crown Estate Scotland provides the best possible service. We are keen to understand the views and experiences of our tenants and how we can improve what we do.

Please complete the survey by \_\_\_\_\_. If you need any additional support to complete the survey, or have any questions, please contact Axiom Research & Consultancy, who are managing the survey on Crown Estate Scotland's behalf, on 0141 212 7980 or email [info@axiomconsultancy.co.uk](mailto:info@axiomconsultancy.co.uk)

The questionnaire should take no more than **15 minutes** to complete.

Your participation is voluntary, and your response is anonymous and confidential. Crown Estate Scotland takes your views and opinions seriously and is committed to taking action in response to your feedback. Please take this opportunity to complete the survey and share your feedback.

### Your Privacy, Axiom and GDPR

The survey is being managed for Crown Estate Scotland by an independent survey provider, Axiom Research & Consultancy, who are a Market Research Society Company Partner and governed by the Society's Code of Conduct. The feedback will be analysed and reported on by Axiom and they will not report any information that can personally identify you. The raw data from the survey will not be shared with Crown Estate Scotland.

Axiom is committed to meeting the EU General Data Protection Regulation and the Market Research Society Code of Conduct. In summary:

- We will not disclose any of your details
- We will anonymise all our reports
- We will only use the information you provide for the purposes of this research
- We will only use personal identification data (e.g. name, email, phone number contact address) to contact those to be included in the research
- We will never pass on any identifying data to any other organisation
- We will permanently delete any personal identifying data as soon as is practical after the end of each project.

By pressing the NEXT button below, you are agreeing to participate in the survey.

## **Awareness and perceptions**

**Q1** Thinking about your knowledge of Crown Estate Scotland, would you say you are ...

Very knowledgeable about Crown Estate Scotland	<input type="checkbox"/>
Quite knowledgeable about Crown Estate Scotland	<input type="checkbox"/>
Aware but not very knowledgeable about Crown Estate Scotland	<input type="checkbox"/>
Have little knowledge of Crown Estate Scotland	<input type="checkbox"/>
Have no knowledge of Crown Estate Scotland	<input type="checkbox"/>

## **Crown Estate Scotland service and communication**

This section relates to the general communication and wider interaction you have with Crown Estate Scotland. (**Please note**, you will be asked separate questions relating to communication and interaction with Managing Agents).

**Q2** How would you rate Crown Estate Scotland with respect to the following. Please record your answer below, responding on a scale of 1 to 10 where 1 is very poor and 10 is excellent.

	Very Poor							Excellent			
	1	2	3	4	5	6	7	8	9	10	Don't know
Clarity and openness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understanding your needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of Communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Efficiency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Responsiveness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professionalism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall Performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q3** How would you speak about Crown Estate Scotland to others? Please rate this on a scale of 1 to 10 where 1 is very negatively and 10 is very positively.

Very Negatively

Excellent

1	2	3	4	5	6	7	8	9	10	Don't know
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### **Contact and Communication**

**Q4** Thinking of the information you receive directly from Crown Estate Scotland i.e. from the staff directly via e.g. email or letter, how useful is it? Please rate this on a scale of 1 to 10 where 1 is not at all useful and 10 is very useful.

Not at all useful

Very Useful

1	2	3	4	5	6	7	8	9	10	Don't know	Not Applicable
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q4b** We would be grateful for the reason/s to the above. Please use the box below.

**Q5** And again, thinking of the information you receive directly from Crown Estate Scotland, how easy is to understand? Please rate this on a scale of 1 to 10 where 1 is not at all easy to understand and 10 is very easy to understand

Not at all

Very easy

1	2	3	4	5	6	7	8	9	10	Don't know
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q5b** We would be grateful if you could expand on the reason/s for the above, especially on whether some forms of communication are currently good and which forms could be improved - this could relate to e.g., letters, emails, face to face communication etc. Please use the box below.

**Q6** What are the key things you would like to hear about from Crown Estate Scotland?

**Q7** How would you like Crown Estate Scotland to communicate with you?

Letter	<input type="checkbox"/>
Email	<input type="checkbox"/>
Other (please write in below)	<input type="checkbox"/>

**Q8** Is the frequency of contact that you have with Crown Estate Scotland appropriate and meet your needs?

Yes	<input type="checkbox"/>
No	<input type="checkbox"/>

**Q8b** If not, please can you explain how this can be improved

**Q9** To what extent would you say that Crown Estate Scotland (*including* its Managing Agents) works in partnership with you? Partnerships usually involve people working together and collaboratively to achieve a shared goal or aim.

Not at all							Extensively			
1	2	3	4	5	6	7	8	9	10	Don't know
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### **Rent Payment and value for money**

**Q10** Thinking about the rent that you pay to Crown Estate Scotland, how satisfied or dissatisfied are you overall with the following aspects? Again, please rate on a scale of 1 to 10, where 1 is very dissatisfied and 10 is very satisfied.

	Very Dissatisfied							Very Satisfied			
	1	2	3	4	5	6	7	8	9	10	Don't know
Understanding of how rents are set	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ease of rent payment arrangements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Value for money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q10b** Please record any comments you wish to make about rents or value for money in the box below.



**Overall Service**

**Q11** Overall, how satisfied or dissatisfied are you with the service provided by Crown Estate Scotland?

Very dissatisfied

Very Satisfied

1	2	3	4	5	6	7	8	9	10	Don't know
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q11b** We would welcome any additional comments. Please use the box below should you wish to include anything further.

**General**

**Q12** Has the level of service you receive from Crown Estate Scotland changed in the last two years?

Much Better	<input type="checkbox"/>
Better	<input type="checkbox"/>
Same	<input type="checkbox"/>
Worse	<input type="checkbox"/>
Much Worse	<input type="checkbox"/>

**Q12b** We would welcome any additional comments

**Q13** How could Crown Estate Scotland improve the service it directly provides to you.  
Please use the box below

**Q14** Thinking broadly about what impacts on you/your business, what are your key concerns in the short term i.e. the next 2 to 3 years?

**Managing Agents**

**Q15** Do you deal with one of the firms of managing agents who work on behalf of Crown Estate Scotland? These include Bidwells, Strutt & Parker, Savills, Wardell Armstrong, and London & Scottish.

Yes	<input type="checkbox"/>	Go to Q13
No	<input type="checkbox"/>	Go to Q14

**Q15b** Which Managing Agent do you deal with?

(Please write in response) \_\_\_\_\_

**Q16** How would you rate the Managing Agents you deal with in respect to the following, where 1 is very poor and 10 is excellent?

	Very Poor					Excellent					
	1	2	3	4	5	6	7	8	9	10	Don't know
Clarity and openness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understanding your needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Responsiveness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Efficiency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professionalism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall tenant Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q16b** Please record any comments (positive or negative) you wish to make about the agent/s you deal with in the box below

**Q17** How could Crown Estate Scotland improve the service it provides to you through its Managing Agents? Please use the box below

**Q18** Has the level of service you receive from the Managing Agents changed in the last two years?

Much Better	<input type="checkbox"/>
Better	<input type="checkbox"/>
Same	<input type="checkbox"/>
Worse	<input type="checkbox"/>
Much Worse	

**Q18b** We would welcome any additional comments

**Thank you very much for taking the time to complete this questionnaire**

## Appendix 2:

### Technical Report



## Technical Report: Tenant Survey

<b>Client</b>	Crown Estate Scotland
<b>Project Name</b>	2022 Tenant Survey
<b>Research Objectives</b>	<p>The objectives of the research programme were to help ensure that Crown Estate Scotland:</p> <ul style="list-style-type: none"> <li>are aware of critical issues impacting tenants, be it strategic issues related to their operating environment or more practical matters;</li> <li>consolidate their corporate reputation;</li> <li>can respond, where appropriate, to issues raised relating to how they do business and how they communicate with tenants;</li> <li>Establish a baseline within context of new corporate plan and communications and engagement strategy.</li> </ul> <p>The outcomes of the research will enable Crown Estate Scotland to establish:</p> <ul style="list-style-type: none"> <li>A baseline for future targets and continual improvement; and</li> <li>customer service improvements and a culture of customer centricity.</li> </ul>
<b>Target group</b>	The target group that were in scope for the research included, Agriculture, Residential, Coastal, Commercial, Mines Royal, Salmon Fishing, Forth Salmon Fishing, Estate Fisheries, Sporting Tenancies, Recreation sites and Industrial tenancies.
<b>Target Sample Size</b>	The total sample size was 1959 tenants.
<b>Date of Fieldwork</b>	Research took place from November through to mid-January, with each survey type phased to ensure busy times were avoided over the festive period.

<b>Sampling Method</b>	<p>All property tenants in scope for the research received a survey invitation.</p> <p>No sample was drawn</p>
<b>Interview Method</b>	<p>The survey was undertaken using a mixed methods approach. Where emails were available, tenants were sent an email invitation to complete the survey online.</p> <p>Where no emails were available, tenants were issued with a postal survey for completion and return. Questionnaires were mailed out with a covering letter and a pre-paid return envelope.</p> <p>In addition, a number of CATI telephone interviews were conducted to boost the overall response rate.</p>
<b>Achieved Number of interviews</b>	390 completed interviews
<b>Response Rate</b>	Overall response rate of 20%
<b>Incentives offered</b>	None



## BD(2023)36.4 – Annex B

# Research Report 2023 Aquaculture Tenants Survey

Prepared for:  
**Crown Estate Scotland**  
**June 2023**

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Appendix 2: Technical Report

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Date	9 <sup>th</sup> June 2023	Date	9 <sup>th</sup> June 2023

## Executive Summary

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

### 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.

### 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.

### 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.

## 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.

## 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.

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.

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.

## 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.

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

## 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. A copy of the survey questionnaire is provided in Appendix 1.

The research was undertaken using CATI (computer assisted telephone interviewing).

The telephone research was 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 aquaculture 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 report provides an analysis of the three customer groups, with the findings presented for each customer group in a separate chapter.

In preparing the report, we highlight the findings from:

- Shellfish tenants
- Finfish tenants
- Seaweed tenants

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).

Throughout the questionnaire, tenants were offered the opportunity to provide their views on questions asked. In some instances, no views were provided. Where respondents provided additional views, these have been included in the report.

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.

## 2.6 Report Structure

The report details the main findings to emerge from the research, addressing the key research aims for Crown Estate Scotland. The main findings for each of the three customer sub-groups described above considers the following themes:

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

In addition, the following supporting information has been provided as appendices:

Appendix 1: Questionnaire  
Appendix 2: Technical Report

### 3. Shellfish Tenants

#### 3.1 Introduction

The following section of the report showcases the results from the 2023 tenants survey and where possible compares surveys scores with the previous research conducted with shellfish tenants in 2017.

The survey was sent to 63 Shellfish tenants. A total of 35 completed interviews were achieved representing a response rate of 55%.

The survey accuracy is +/- 11.3% based on a 50% estimate at the 95% confidence interval. This means that in 19 cases out of 20, a percentage result of 50% obtained from a single representative sample of 35 would reflect a true value – the value obtained by interviewing everyone in the target audience – of between 38.7% and 61.3%, with the most likely value being 50% itself.

The lower the survey accuracy score is, the more statistically robust the survey data is. Therefore, the survey of shellfish tenants provides an indicative picture of the views, attitudes and experiences of coastal tenants.

When reviewing the results, it should also be recognised that any shifts in attitudes that fall within a range of 11.3% from comparative data in 2017 survey score should not be considered a statistically significant shift in attitudes amongst coastal tenants.

#### 3.2 Awareness and Perceptions

Respondents were initially asked about how knowledgeable they felt they were about Crown Estate Scotland. 74% felt they were aware, and quite knowledgeable about the organisation, with a further 6% indicating they were very knowledgeable.

	2023 Score	2017 Score
Very knowledgeable about Crown Estate Scotland	6%	4%
Quite knowledgeable about Crown Estate Scotland	74%	59%
Aware but not very knowledgeable about Crown Estate Scotland	17%	30%
Have little knowledge of Crown Estate Scotland	3%	7%
Have no knowledge of Crown Estate Scotland	0	0

It can be seen that the level of knowledge about Crown Estate Scotland is now higher compared to the previous research conducted with shellfish tenants in 2017. (80% stating quite or very knowledgeable in 2023, compared to 63% in 2017).

### 3.3 Service and Communications

Respondents were asked how they rate Crown Estate Scotland across a range of brand metrics on a scale of 1-10, where 1 was very poor and 10 was excellent. Positive sentiment would be considered as a score of 7 or more.

Positive sentiment is currently highest for:

- Professionalism
- Overall Performance

Positive sentiment is currently lowest for:

- Understanding your needs
- Clarity and openness
- Responsiveness

We present the data showcasing the mean score. Positive sentiment would be reflected with a mean score closest to 10.

	Mean Score 2023	Mean Score 2017
Clarity and openness	7.0	7.7
Understanding your needs	6.8	7.5
Quality of Communication	7.2	7.9
Efficiency	7.2	7.7
Responsiveness	7.0	7.9
Professionalism	7.6	8.4
Overall Performance	7.7	8.2

Compared to the survey scores reported in 2017, positive sentiment has declined slightly across all of the brand metric indicators.

Respondents were then asked **how they would speak about Crown Estate Scotland to others** (on a scale of 1 to 10 where 1 was very negatively and 10 was very positively).

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
3%	0	0	0	3%	3%	19%	66%	6%	0	0

91% of the respondents provided a rating of 7 or more, indicating a positive sentiment towards the organisation. The mean score is 7.5 (compared to a mean of 7.9 in 2017).

### 3.4 Contact and Communications

Respondents were asked how they felt about the information they received directly from Crown Estate Scotland. When asked to rate the **usefulness of the information** they received (on a scale of 1 to 10 where 1 was not all useful and 10 was very useful), respondents were largely positive.

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
3%	0	0	0	9%	6%	29%	49%	6%	0	0

84% of the respondents provided a rating of 7 or more, indicating they felt the information received was useful. The mean score is 7.2 (compared to a mean of 7.4 in 2017).

Twelve comments were received providing context to the range of scores provided. Where respondents were dissatisfied, this related to poor/slow timing of information being released. Where respondents were satisfied comments related to the information being relevant, clear and informative. Direct contact with staff was also praised.

Respondents were asked to rate **how easy it is to understand the information received** from Crown Estate Scotland (on a scale of 1 to 10 where 1 was not all easy and 10 was very easy).

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
3%	0	0	0	3%	0	58%	36%	0	0	0

94% of the respondents provided a rating of 7 or more, indicating they felt the information received was easy to understand. The mean score is 8.1 (compared to a mean of 7.8 in 2017).

Eight comments were received regarding ease of understanding information. These primarily commented on the tone of the content being clear and concise. Again, direct contact with staff was praised and staff were praised for being professional and conscientious.

When asked what **key things they would like to hear about** from Crown Estate Scotland, 14 comments were received. Five were in relation to future plans / changes to future policy, four were in relation to tenancies (three commenting on concerns over the long-term security of leases and one commenting on why Crown Estate Scotland was passing leases over to the Council), two comments related to the security of the sector, and two were about regulations.

Respondents were asked **how they would like Crown Estate Scotland to communicate with them**<sup>1</sup>. 54% indicated that they would like information to be sent by letter.

	2023 Score	2017 Score
Letter	54%	N/A
Email	46%	N/A

<sup>1</sup> This question is a new addition to the 2023 Aquaculture tenants survey; therefore, no comparable data is available for 2017.

Respondents were then asked if the **frequency of contact was appropriate and met their needs**. The vast majority of respondents indicated that the frequency of contact was appropriate.

	2023 Score	2017 Score
Yes	97%	N/A
No	3%	N/A

### 3.5 Rent

Respondents were asked their views on **rent payment**. When asked to rate how satisfied or dissatisfied they were with the following statements on a scale of 1-10, where 1 was very dissatisfied and 10 was very satisfied, the following views emerged.

	Mean Score 2023	Mean Score 2017
Understanding of how rents are set	8.1	6.6
Ease of rent payment arrangements	8.6	8.2

Satisfaction scores with regard to rent had 100% positive sentiment with scores above 7. Satisfaction was highest for ease of rent payment arrangements. Satisfaction with understanding how rents are set has increased since the baseline survey in 2017.

When asked for further comments to provide context to the scores, two respondents commented on the lack of security of the lease.

### 3.6 Overall Satisfaction

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.

1	2	3	4	5	6	7	8	9	10	Don't know
0	0	3%	0	6%	0	9%	71%	9%	3%	0

92% of respondent indicated that overall, they were satisfied providing a rating of 7 or more with the service provided by Crown Estate Scotland. This compares to 3% who expressed



dissatisfaction with a rating of 4 or less. The mean score is 7.7 which has remained unchanged since 2017.

Respondents were further asked whether they felt the level of service they received from Crown Estate Scotland had changed in the last two years.

	2023 Scores	2017 Scores
Much Better	0	4%
Better	3%	18%
Same	94%	78%
Worse	3%	0
Much Worse	0	0

The majority of respondents indicated that they believed the level of service to be the same (94%). 3% indicated they felt it was better. In contrast 3% indicated they felt it was worse. This would suggest that the service improvement (indicated by the 18% score for better in 2017) has been maintained.

When asked if there were additional comments respondents would like to make, only four comments were received. Two praised improvements & consistency of engagement with the sector by Crown Estate Scotland, one mentioned concern over the sustainability and security of the sector and one mentioned concern over changes in future policy.

## 4. Finfish tenants

### 4.1 Introduction

The survey was sent to 20 Finfish tenants. A total of 15 completed interviews were achieved representing a response rate of 75%.

The survey accuracy is +/- 12.98% based on a 50% estimate at the 95% confidence interval. This means that in 19 cases out of 20, a percentage result of 50% obtained from a single representative sample of 15 would reflect a true value – the value obtained by interviewing everyone in the target audience – of between 37.02% and 62.98%, with the most likely value being 50% itself.

The lower the survey accuracy score is, the more statistically robust the survey data is. Therefore, the current survey of finfish tenants provides an indicative picture of the views, attitudes and experiences of finfish tenants.

### 4.2 Awareness and Perceptions

Respondents were initially asked about **how knowledgeable they felt they were about Crown Estate Scotland**. 60% felt they were aware, and quite knowledgeable about the organisation, with a further 13% stating that they were very knowledgeable.

It can be seen that there has been an uplift in the number of finfish tenants stating that they are 'very knowledgeable' since 2017.

	2023 Score	2017 Score
Very knowledgeable about Crown Estate Scotland	13%	0
Quite knowledgeable about Crown Estate Scotland	60%	80%
Aware but not very knowledgeable about Crown Estate Scotland	20%	20%
Have little knowledge of Crown Estate Scotland	7%	0
Have no knowledge of Crown Estate Scotland	0	0

7% indicated that they were aware, but not very knowledgeable about Crown Estate Scotland.

### 4.3 Service and Communications

Respondents were asked **how they rate Crown Estate Scotland across a range of brand metrics** on a scale of 1-10, where 1 was very poor and 10 was excellent.

Positive sentiment is highest for:

- Professionalism
- Overall Performance
- Quality of communication
- Efficiency

Positive sentiment is lowest for:

- Understanding your needs
- Clarity and openness

We present the data showcasing the mean score for each brand metric, comparing the current score with the baseline score conducted in 2017.

	2023 Mean Scores	2017 Mean Scores
Clarity and openness	7.4	7.2
Understanding your needs	7.3	7.2
Quality of Communication	8.1	7.2
Efficiency	8.1	6.6
Responsiveness	7.9	6.8
Professionalism	8.1	8.2
Overall Performance	8.1	7.2

It can be seen that positive sentiment has increased the most since 2017 with regard to:

- Efficiency

- Responsiveness
- Overall Performance
- Quality of Communication

Respondents were then asked **how they would speak about Crown Estate Scotland to others** (on a scale of 1 to 10 where 1 was very negatively and 10 was very positively).

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
0	0	0	0	0	0	0	93%	7%	0	0

93% of the respondents provided a rating of 8, with the remaining 7% providing a score of 9, indicating 100% positive sentiment towards the organisation. The current mean score for finfish tenants is 8.1 compared to a mean score of 6.8 in 2017, indicating a notable improvement.

#### 4.4 Contact and Communications

Respondents were asked how they felt about the information they received directly from Crown Estate Scotland. When asked to **rate the usefulness of the information they received** (on a scale of 1 to 10 where 1 was not at all useful and 10 was very useful), respondents were largely positive.

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
0	0	0	0	0	0	0	86%	14%	0	0

86% of respondents provided a rating of 8, with the remaining 14% providing a score of 9, indicating that 100% of finfish tenants felt the information received was useful. The current mean score is 8.1, compared to a mean score of 6.4 in 2017, again indicating a notable improvement.

When asked for further information about why they felt the information was useful, three comments were received. Two comments cited that the information was relevant and the other commented that staff were fully briefed and knowledgeable.

Respondents were then asked to rate **how easy it is to understand the information** received from Crown Estate Scotland (on a scale of 1 to 10 where 1 was not all easy and 10 was very easy). The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
0	0	0	0	0	0	0	67%	33%	0	0

67% of the respondents provided a rating of 8, with the remaining 33% providing a rating of 9, indicating that 100% of finfish tenants felt the information received was easy to understand. The current mean score is 8.3, compared to a mean score of 6.4 in the 2017 baseline survey, indicating a notable improvement.

Three comments were received regarding ease of understanding the information provided, all three praising the clarity of messaging/content.

When asked about the **key things they would like to hear more about** from Crown Estate Scotland, two comments were received, both citing more information on future plans/changes.

Respondents were asked **how they would like Crown Estate Scotland to communicate with them**. 53% indicated that they would like information to be sent by letter.

	2023 Score	2017 Score
Letter	53%	N/A
Email	47%	N/A

Respondents were then asked **if the frequency of contact was appropriate and met their needs**. All respondents indicated that the frequency of contact was appropriate (100%).

	2023 Score	2017 Score
Yes	100%	N/A
No	0	N/A

## 4.5 Rent

Respondents were asked their views on rent payment. When asked to rate how satisfied or dissatisfied they were with the following statements on a scale of 1-10, where 1 was very dissatisfied and 10 was very satisfied, the following perceptions emerged.

We present the data showcasing the current mean score, providing a comparison with the previous 2017 baseline survey.

	2023 Mean Scores	2017 Mean Scores
Understanding of how rents are set	8.1	7.2
Ease of rent payment arrangements	8.4	7.8

Satisfaction was highest for ease of rent payment arrangements, with 60% expressing a rating of 8 and the remaining 40% providing a rating of 9, indicating 100% positive sentiment regarding ease of rent payments.

1	2	3	4	5	6	7	8	9	10	Don't know
0	0	0	0	0	0	0	60%	40%	0	0

100% expressed positive sentiment regarding understanding how rents are set, with 7% expressing a rating of 7, 73% providing a rating of 8 and a further 20% providing a rating of 9.

1	2	3	4	5	6	7	8	9	10	Don't know
0	0	0	0	0	0	7%	73%	20%	0	0

Satisfaction has increased for both metrics since the baseline survey.

## 4.6 Overall Satisfaction

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.

1	2	3	4	5	6	7	8	9	10	Don't know
0	0	0	0	0	0	7%	93%	0	0	0

93% of respondents indicated that overall, they were satisfied providing a rating of 8 with the service provided by Crown Estate Scotland. The remaining 7% provided a rating of 7, indication that 100% of finfish tenants were satisfied with the overall service provided by Crown Estate Scotland.

The current mean score is 7.9 compared to a mean score of 6.6 in the 2017 baseline survey.

Respondents were further asked whether they felt the level of service they received from Crown Estate Scotland had changed in the last two years.

	2023 Scores	2017 Scores
Much Better	0	0
Better	0	20%
Same	100%	80%
Worse	0	0
Much Worse	0	0

100% of finfish tenants indicated that they felt the level of service has remained unchanged in the last two years. This would suggest that the service improvement, as indicated by the 20% who stated the service was better in 2017, has been maintained.

## 5. Seaweed tenants

### 5.1 Introduction

The survey was sent to 15 Seaweed tenants. A total of 10 completed interviews were achieved representing a response rate of 66%.

The survey accuracy is +/- 18.52% based on a 50% estimate at the 95% confidence interval. This means that in 19 cases out of 20, a percentage result of 50% obtained from a single representative sample of 15 would reflect a true value – the value obtained by interviewing everyone in the target audience – of between 31.48% and 68.52%, with the most likely value being 50% itself.

The survey of fishing tenants provides an indicative picture of the views, attitudes and experiences of seaweed 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.

### 5.2 Awareness and Perceptions

Respondents were initially asked about **how knowledgeable they felt they were about Crown Estate Scotland**. 80% felt they were aware, and quite knowledgeable about the organisation.

	2023 Score
Very knowledgeable about Crown Estate Scotland	0
Quite knowledgeable about Crown Estate Scotland	80%
Aware but not very knowledgeable about Crown Estate Scotland	20%
Have little knowledge of Crown Estate Scotland	0
Have no knowledge of Crown Estate Scotland	0

20% indicated that they were aware, but not very knowledgeable about Crown Estate Scotland.



### 5.3 Service and Communications

Respondents were asked **how they rate Crown Estate Scotland across a range of brand metrics** on a scale of 1-10, where 1 was very poor and 10 was excellent. We present the data showcasing the mean score for each brand metric.

	Mean Scores 2023
Clarity and openness	7.6
Understanding your needs	7.0
Quality of Communication	8.0
Efficiency	7.6
Responsiveness	7.5
Professionalism	8.0
Overall Performance	7.8

Positive sentiment is highest for:

- Professionalism
- Quality of communication

Positive sentiment is lowest for:

- Understanding your needs

Respondents were then asked **how they would speak about Crown Estate Scotland to others** (on a scale of 1 to 10 where 1 was very negatively and 10 was very positively).

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
0%	0	0	0	0	0	20%	80%	0	0	0

80% of respondents provided a rating of 8. The remaining 20% provided a rating of 7, indicating that 100% of seaweed tenants expressed positive sentiment towards the organisation. The current mean score is 7.8.

#### 5.4 Contact and Communications

Respondents were then asked how they felt about the information they received directly from Crown Estate Scotland. When asked to rate **the usefulness of the information** they received (on a scale of 1 to 10 where 1 was not at all useful and 10 was very useful), respondents were largely positive.

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
0	0	0	0	0	0	30%	70%	0	0	0

70% of respondents provided a rating of 8, with the remaining 30% providing a rating of 7, indicating that 100% of respondents felt the information received was useful. The current mean score is 7.7.

Respondents were then asked to rate **how easy it is to understand the information received** from Crown Estate Scotland (on a scale of 1 to 10 where 1 was not all easy and 10 was very easy).

The table below shows the range of scores.

1	2	3	4	5	6	7	8	9	10	Don't know
0	0	0	0	0	0	0	70%	30%	0	0

70% of respondents provided a rating of 8, with the remaining 30% providing a rating of 7, indicating that 100% of respondents felt the information received was easy to understand. The mean score is 8.3

When asked about what key things they would like Crown Estate Scotland to communicate, two comments were received which both suggested more information on future plans.

Respondents were asked **how they would like Crown Estate Scotland to communicate with them**. 70% of seaweed tenants would prefer to receive communication by letter.

	2023 Scores
Letter	70%
Email	30%

Respondents were then asked **if the frequency of contact was appropriate and met their needs**. All seaweed tenants indicated that the frequency of contact was appropriate (100%).

	2023 Scores
Yes	100%
No	0

## 5.5 Rent

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

	2023 Scores
Understanding of how rents are set	100%
Ease of rent payment arrangements	100%

When asked about understanding how rents are set, 80% of seaweed respondents provided a rating of 8 and a further 20% provided a rating of 7, indicating 100% satisfaction in this regard.

When asked about ease of rent payments, 10% provided a rating of 7, 50% provided a rating of 8 and 40% provided a rating of 9 indicating 100% satisfaction in this regard.

## 5.6 Overall Satisfaction

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.

1	2	3	4	5	6	7	8	9	10	Don't know
0	0	0	0	0	10%	0	90%	0	0	0

90% of respondent indicated that overall, they were satisfied providing a rating of 8 or more with the service provided by Crown Estate Scotland. The remaining 10% provided a rating of 6 indicating they were neither satisfied nor dissatisfied with the overall service. The mean score is 7.8.

Respondents were further asked **whether they felt the level of service they received from Crown Estate Scotland had changed in the last two years**. 100% of respondents indicated that they felt the overall level of service had remained unchanged in the last two years.

Much Better	0
Better	0
Same	100%
Worse	0
Much Worse	0

## 6. 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 slightly lower and generally 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, with 82% of shellfish respondents expressing positive sentiment in this regard.

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.

## Appendix 1:

### **The Questionnaire**

## Crown Estate Scotland Tenants Survey (AQUACULTURE Tenants)

### Please help us improve our service by completing our survey

Tenant feedback is vital in ensuring Crown Estate Scotland provides the best possible service. We are keen to understand the views and experiences of tenants and how we can improve what we do. Completion of this survey will help us to do that.

The questionnaire should take no more than **10 minutes** to complete.

Your participation is voluntary, and your response is anonymous and confidential. Crown Estate Scotland takes your views and opinions seriously and is committed to taking action in response to your feedback. Please take this opportunity to complete the survey and share your feedback.

OPT IN: Would you be willing to answer a few questions for me?

Yes	<input type="checkbox"/>	Continue
No	<input type="checkbox"/>	Close

### Interviewer to Code

Shellfish Tenant	<input type="checkbox"/>
Finfish Tenant	<input type="checkbox"/>
Seaweed Tenant	<input type="checkbox"/>



## **Awareness and perceptions**

**Q1** Thinking about your knowledge of Crown Estate Scotland, would you say you are

...

Very knowledgeable about Crown Estate Scotland	<input type="checkbox"/>
Quite knowledgeable about Crown Estate Scotland	<input type="checkbox"/>
Aware but not very knowledgeable about Crown Estate Scotland	<input type="checkbox"/>
Have little knowledge of Crown Estate Scotland	<input type="checkbox"/>
Have no knowledge of Crown Estate Scotland	<input type="checkbox"/>

## **Crown Estate Scotland service and communication**

This section relates to the general communication and wider interaction you have with Crown Estate Scotland.

**Q2** How would you rate Crown Estate Scotland with respect to the following. Please record your answer below, responding on a scale of 1 to 10 where 1 is very poor and 10 is excellent.

	Very Poor										Excellent
	1	2	3	4	5	6	7	8	9	10	Don't know
Clarity and openness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understanding your needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of Communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Efficiency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Responsiveness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professionalism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall Performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q3** How would you speak about Crown Estate Scotland to others? Please rate this on a scale of 1 to 10 where 1 is very negatively and 10 is very positively.

Very Negatively

Very Positively

1	2	3	4	5	6	7	8	9	10	Don't know
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### **Contact and Communication**

**Q4** Thinking of the information you receive directly from Crown Estate Scotland e.g. from the staff directly via email or letter, how useful is it? Please rate this on a scale of 1 to 10 where 1 is not at all useful and 10 is very useful.

Not at all useful

Very Useful

1	2	3	4	5	6	7	8	9	10	Don't know	Not Applicable
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q4b** We would be grateful for the reason/s to the above. Please use the box below.

**Q5** And again, thinking of the information you receive directly from Crown Estate Scotland, how easy is to understand? Please rate this on a scale of 1 to 10 where 1 is not at all easy to understand and 10 is very easy to understand.

Not at all

Very easy

1	2	3	4	5	6	7	8	9	10	Don't know
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q5b** We would be grateful if you could expand on the reason/s for the above, especially on whether some forms of communication are currently good and which forms could be improved - this could relate to e.g., letters, emails, face to face communication etc. Please use the box below.

**Q6** What are the key things you would like to hear about from Crown Estate Scotland?

**Q7** How would you prefer Crown Estate Scotland to communicate with you?

Letter	<input type="checkbox"/>
Email	<input type="checkbox"/>
Other (please write in below)	<input type="checkbox"/>

**Q8** Is the frequency of contact that you have with Crown Estate Scotland appropriate and does it meet your needs?

Yes	<input type="checkbox"/>
No	<input type="checkbox"/>

**Q8b** If not, please can you explain how this can be improved

**Rent Payment and value for money**

**Q9** Thinking about the rent that you pay to Crown Estate Scotland, how satisfied or dissatisfied are you overall with the following aspects? Again, please rate on a scale of 1 to 10, where 1 is very dissatisfied and 10 is very satisfied.

	Very Dissatisfied					Very Satisfied					
	1	2	3	4	5	6	7	8	9	10	Don't know
Understanding of how rents are set	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ease of rent payment arrangements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q9b** Please record any comments you wish to make about rents or value for money in the box below.

**Q10** Overall, how satisfied or dissatisfied are you with the service provided by Crown Estate Scotland?

Very dissatisfied								Very Satisfied		
1	2	3	4	5	6	7	8	9	10	Don't know
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q10b** We would welcome any additional comments. Please use the box below to explain your views on overall service.

## General

**Q11** Has the level of service you receive from Crown Estate Scotland changed in the last two years?

Much Better	<input type="checkbox"/>
Better	<input type="checkbox"/>
Same	<input type="checkbox"/>
Worse	<input type="checkbox"/>
Much Worse	<input type="checkbox"/>

**Q11b** We would welcome any additional comments

## Appendix 2:

### Technical Report



## Technical Report: Aquaculture Tenant Survey

<b>Client</b>	Crown Estate Scotland
<b>Project Name</b>	2023 Aquaculture Tenant Survey
<b>Research Objectives</b>	<p>The objectives of the research programme were to:</p> <ul style="list-style-type: none"> <li>▪ 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;</li> <li>▪ Track Crown Estate Scotland's corporate reputation;</li> <li>▪ Position Crown Estate Scotland as a listening and responsive organisation;</li> <li>▪ Effectively support Crown Estate Scotland's long-term planning;</li> <li>▪ Ensure Crown Estate Scotland can respond, where appropriate, to issues raised relating to how they do business and how they communicate with tenants;</li> <li>▪ Identify what Crown Estate Scotland do well and where they can improve</li> <li>▪ Monitor performance and identify key trends over time.</li> </ul>
<b>Target group</b>	The target group that was in scope for the research included, Shellfish, Finfish and Seaweed tenants.
<b>Target Sample Size</b>	The total sample size was 100 aquaculture tenants.
<b>Date of Fieldwork</b>	Fieldwork was conducted in May 2023.
<b>Sampling Method</b>	All Aquaculture tenants in scope for the research were contacted to participate in the survey.

	No sample was drawn.
<b>Interview Method</b>	The survey was undertaken using CATI (computer assisted telephone interviewing).
<b>Achieved Number of interviews</b>	60 completed interviews
<b>Response Rate</b>	Overall response rate of 60%
<b>Survey accuracy</b>	The overall sample size of 60 provides a dataset with a margin of error of between $\pm 8.04\%$ and $\pm 18.52\%$ , calculated at the 95% confidence level (market research industry standard).



## Board Paper

<b>Date of Meeting:</b>	30 August 2023
<b>Classification:</b>	Unrestricted
<b>Subject:</b>	Decarbonisation and the Glenlivet Estate
<b>Paper Number:</b>	BD(2023)36.5
<b>Annexes:</b>	None
<b>Recommendation:</b>	The Board is invited to note this paper and provide comment
<b>Presenter:</b>	Jess Thorne
<b>Author:</b>	Jess Thorne

**Our purpose: Investing in property, natural resources and people  
to generate lasting value for Scotland**

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### 1. Purpose and context

This briefing paper refers to my research project which identifies opportunities to deliver carbon sequestration, generate economic return, and enhance biodiversity through the holistic, long-term management of the forestry and peatland assets on Glenlivet Estate.

The project details the complex history between deforestation, commercial forestry, and peatlands, explaining why peatland restoration is necessary and important. The environmental and socio-economic value of both assets are explained, as are the land use conflicts between them, particularly the issue of Sitka spruce regeneration and its effect on the Scottish Crown Estate peatland ecosystems, farming tenants, and sporting tenants. The project identifies that these issues are echoed on a national scale and aims to raise awareness and generate thinking to develop solutions.

Climate change and emission reduction legislations and policies are placing decarbonisation at the centre of many organisations' strategic plans. My research project promotes peatland restoration on the Estate as a method of delivering carbon sequestration to meet our net zero ambitions, and an opportunity habitat restoration to meet our statutory requirements for biodiversity reporting, while also generating revenue through the carbon credit markets.

## 2. Background

My research project suggests that a more strategic approach to managing the forestry and peatland assets on Glenlivet Estate is needed to meet Crown Estate Scotland's diversified organisational objectives.

Forestry generates revenue for the Estate, but also presents some challenges to peatland restoration and the potential value which could be obtained from it, economically and environmentally.

The UK is still heavily reliant on timber imports, therefore maintaining and enhancing our forestry asset is completely necessary. It also contributes to local employment, sequesters carbon, provides habitat and amenity spaces. However, peatlands are being recognised as increasingly important in the fight against the nature and climate crises: self-regulating peatlands have the potential to store more carbon than forests over a longer period and provide a variety of habitat, all with minimal human intervention.

Our peatland asset holds opportunities for offsetting our own and potentially wider emissions, generating revenue in the process through the carbon credit markets. Markets for carbon credits are being developed, known as the Woodland Carbon Code and the Peatland Code. The Estate already sequesters carbon in its forestry asset but is yet to achieve (or quantify) sequestration through its peatland asset. Both assets could be valuable to carbon markets and should be explored further.

The holistic management of both assets is of vital importance to the economic and environmental health of Glenlivet Estate and would therefore benefit Crown Estate Scotland overall. My research paper highlights that one asset cannot be prioritized over the other, as has been the case in the past, and an integrated management approach is needed.

The main issue to be addressed to achieve integrated management is the regeneration of non-native commercial tree species (Sitka spruce) on peatland restoration sites such as Glenmullie (a project on Glenlivet Estate). Healthy peatlands are too wet to grow trees, however most peatlands are now degraded in some way, meaning the water table is low enough to allow the growth of non-natives. The non-natives are more suited to wetter environments, and are more tolerant to herbivore browsing, meaning they outcompete native species in this setting. As a result, the non-natives can establish themselves very well on a degraded peatland, altering the vegetation and hydrology of the site further, inhibiting restoration.

It is unclear what form a mature non-native forest on a degraded peatland will take, and whether it will have any biodiversity or commercial value. What *is* known is that Sitka regeneration has a significant impact on the farming or sporting tenant whose land it's growing on, inhibiting their normal activities and in some cases costing them money, either through loss of subsidies or incurred costs of tree removal.

Advice from Scottish Forestry, Forestry and Land Scotland, Forest Research, RSPB, and PeatlandAction (Cairngorms National Park division), was sought in the formulation of the research project.

I presented the research project proposal and findings to the Executive Team in March and in August.

### 3. Recommendation

Following the business case process, options should be considered for the creation of the next Long Term Forest Plan for Glenlivet Estate. It's currently due for renewal and the recommendation of my report is that the new plan should take peatland into account and include forest modifications where necessary to facilitate peatland restoration: for example, planting native woodland buffer zones on the edges of non-native forestry where the neighbouring land use is, or could be, peatland restoration; prioritising the felling of problematic seed sources contributing to the regeneration of non-natives; and restocking with more appropriate species which do not have the potential to compromise restoration efforts.

Further recommendations are:

- Determination of our rationale for peatland restoration. For example, is the primary objective carbon sequestration and the carbon market, or habitat restoration? Both are achieved through peatland restoration, but which will be the driver, and which will be the desirable byproduct? This is important to clarify as it will influence the management objectives of the land which will influence the outcomes.
- Assessment of peatland restorations impact on achieving our decarbonisation targets. This would include the quantification and valuation of Glenlivet Estate's peatland asset in terms of non-financial value.
- Assessment of the extent and impact of Sitka spruce regeneration on Glenlivet Estate's environment and tenants, including its potential financial and reputational risk to the business.
- Assessment of the next steps for Glenmullie peatland restoration project.
- Establishment of an ecological and carbon baseline for Glenlivet so that all future management can be measured and evaluated against the baseline.

Much of the work completed as part of these recommendations would have the added benefit of feeding into long-term corporate planning and Glenlivet 2050 master planning.

**Please note the listed recommendations would require additional resourcing, outsourcing, and project management to be achieved.**

### 4. Corporate / Business Plan alignment

The research project aligns with Corporate Plan Strategic Objective: "Promote new sustainable ways of using natural resources to produce energy, food and other products."

Action 23 of the Corporate Plan is to "promote sustainable use of natural resources and position Crown Estate Scotland as a leader in natural capital management with a focus on

biodiversity, soil and water health, biosecurity, carbon and environmental / ecosystem resilience”.

The Corporate Plan lists the following ways Crown Estate Scotland seek to embed the natural capital approach:

- Completing natural capital assessment of key rural assets’ natural capital to identify opportunities for improvements.
- Continuing work with agricultural tenants and other partners to embed natural capital approach in business management; and
- Exploring opportunities for carbon sequestration.

The Crown Estate Scotland Business Plan 2022/23 actions relating to the above Corporate Plan objective are:

**Action 27** - Progress peatland restoration at Glenlivet Estate working with Cairngorms National Park Authority Peatland Action officers.

**Action 31** – Develop a future plan for Glenlivet Estate.

**Action 33** - Develop long-term vision for Crown Estate Scotland to inform future 5-yearly corporate plans.

## 5. Risk Analysis

There are significant social, environmental, and financial risks associated with not taking the recommendations of my research paper forward.

Social:

- There is a risk that our reputation as a ‘landlord of choice’ is damaged. If farm and sporting tenants continue to lose land to Sitka spruce regeneration, tenants will become frustrated and may become more outspoken about the issue, increasing the chance of negative press. Assessing the extent of the Sitka spruce regeneration across the Estate would be the first step in Crown Estate Scotland developing an approach towards the spread of this invasive species and mitigating this risk.
- Our reputation as an exemplary Estate is at risk. Other Estates are developing strategic land management plans which address modern issues such as climate change, ecological degradation, and the spread of invasive species. Establishing an ecological and carbon baseline on the Estate would be the first step in developing a progressive land management strategy.
- Crown Estate Scotland is at risk of being viewed as an organization which fails to honour partnership commitments. As a public body we are expected to align with the Cairngorms National Park Authority Landscape Partnership Plan (LPP). Peatland restoration is one of the top priorities of the plan. Assessing the extent of the peatland asset on the Estate would be

the first step in establishing a peatland restoration strategy and aligning with the LPP in this context.

- There is a risk Crown Estate Scotland will come into disrepute over Glenmullie peatland restoration project. Thousands of pounds of public money have been spent over the last 10 years and the peatland is still degrading. Establishing the most suitable next steps for Glenmullie and actioning them would mitigate this risk.

#### Environmental:

- Unchecked Sitka spruce regeneration at Glenmullie presents a risk to the environment. There is little understanding of the long-term ecological impact of Sitka regeneration on open moorland. The resulting forest could provide very little biodiversity value compared to the peatland on which it has regenerated on, resulting in a biodiversity net loss. Clearing the Sitka spruce regeneration regularly would mitigate this risk. However, there is also an opportunity to study what would happen if the spruce forest was allowed to regenerate, which would improve understanding and mitigate the risk that way. This is also true for all other areas of Sitka regeneration on the Estate.
- If our peatlands are not restored, Crown Estate Scotland is at risk of not achieving its decarbonisation and net zero ambitions. Degraded peatlands emit vast quantities of carbon dioxide, whereas healthy peatlands sequester carbon from the atmosphere and store it underground for long periods. Quantifying the extent and health of the peatland asset on the Estate would enable us to assess the emissions currently being released or stored by the asset. Understanding the potential carbon storage capability of the asset would help mitigate the risk.
- Crown Estate Scotland is at risk of not meeting the obligations of our statutory biodiversity duty. Peatland is a UK Biodiversity Action Plan priority habitat, not restoring our peatlands would impact negatively on the Estate biodiversity and our reporting. Restoring our peatlands and monitoring the subsequent biodiversity increases against a baseline would feed into our reports and mitigate the risk.

#### Financial

- There is a risk that more tenants begin to claim money through Crown Estate Scotland funding opportunities to clear Sitka regeneration on the land that they manage. Sitka regeneration takes tenanted land out of production; therefore, tenants want to remove it to regain full access to all the land included in their tenancy agreements. Removal of Sitka regeneration is very costly and often requires multiple interventions over time, resulting in long term investment. Some tenants may not be able to afford to clear the land themselves and may apply to Crown Estate Scotland for funding to do so. Crown Estate Scotland would need to establish how many tenants are affected and quantify the potential financial risk, then decide how to mitigate.

## 6. Financial Implications

There are no financial implications associated with the research project itself. The recommendations would need to be fully scoped and costed if taken forward.

Assessing the financial impact of the work required as part of the recommendations would be an activity for the future should any of the recommendations be taken forward.

Some of the recommendations could assist with long-term budget planning.

Much of the costs associated with the recommendations would be the cost of resourcing and outsourcing.

## **7. Sustainable Development and Wider Value**

An asset profile specifically for peatland could be developed to quantify the value of the asset. Peatland restoration is briefly mentioned in the sporting asset profile, but the full asset is neither qualified nor quantified.

The recommendations of the project seek to enhance the value of Scottish Crown Estate assets and the income arising from them while also delivering environmental and social wellbeing.

## **8. Stakeholder relations / reputation**

The most interested stakeholder is likely to be the Cairngorms National Park Authority (CNPA) as they are working with Crown Estate Scotland to deliver Glenmullie peatland restoration project on Glenlivet Estate. The Park is very keen to reach an agreement regarding the management of the Sitka spruce regeneration at Glenmullie, as it is a large factor in the success of the project. Failing to reach a timely agreement could result in strained relations with an important partner organization. If Glenmullie peatland restoration was successful it would generate positive publicity for Crown Estate Scotland, as would further commitments to deliver peatland restoration on the Estate. Members of the CNPA Peatland Action team have been engaged with as part of this research project.

Not establishing a clear policy regarding Sitka spruce regeneration on tenanted land could result in strained landlord-tenant relations. A tenant on Auchindoun Estate has received funding from Crown Estate Scotland through the Sustainable Communities Fund Environment Grant to clear Sitka regen on their land. More tenants may begin to seek this method of resolution. Having a clear policy on who is eligible under what circumstances would make the decision-making process for individual applications easier. No action on Sitka spruce regeneration on tenanted land could result in negative publicity for Crown Estate Scotland.

Achieving net zero using our own assets as opposed to offsetting using non-Crown Estate Scotland assets would most likely be better received with the public and stakeholders, including the Scottish Government. Not achieving net zero at all would result in negative publicity.

## **9. Impact Assessments**

None completed as part of this work, but recommendations may result in future ones.

## 10. Legal and compliance

Out of the 2 active peatland restorations on Glenlivet Estate, one of them (Feith Mussach) is a legal obligation under planning conditions agreed as part of the old commercial peat cutting works on the site.

The other project (Glenmullie) is a voluntary agreement with the Cairngorms National Park Authority and PeatlandAction.

As mentioned previously, we are required to align with the Cairngorms National Park Landscape Partnership Plan, which identifies peatland restoration as a priority.

We are also required to comply with Scottish Government legislation and policy, including:

- The **Climate Change (Emissions Reduction Targets) (Scotland) Act 2019** and the supporting **Climate Change Plan 2018-2032**, which identifies peatlands as a decarbonisation tool.
- **The Nature Conservation (Scotland) Act 2004**, which requires all public bodies to report on actions taken to improve biodiversity.
- And the **Scottish Biodiversity Strategy to 2045**, which identifies peatlands as a carbon credit investment opportunity and a nature -based solution to delivering NetZero.

## 11. Project Governance and Performance Indicators

If recommendations were taken forward, project governance and performance indicators would be developed.

## Board Paper

<b>Date of Meeting:</b>	30 August 2023
<b>Classification:</b>	Unrestricted
<b>Subject:</b>	Chief Executive's Report
<b>Paper Number:</b>	BD(2023)36.6
<b>Annexes:</b>	Annex A: Q1 2023-24 Performance Dashboard
<b>Recommendation:</b>	The Board is invited to note (a) the report which covers activity from early-May 2023 to mid-August 2023 and (b) the Q1 Performance Dashboard at Annex A.
<b>Presenter:</b>	Ronan O'Hara
<b>Author:</b>	Various

**Our purpose: Investing in property, natural resources and people  
to generate lasting value for Scotland**

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### 1. Overview

Delivery on the 2023-24 Business Plan is covered in the annexed quarterly dashboard. Separate papers cover People & HR and stakeholder meetings & engagement.

Key points to note include:

- The 2023-24 Business Plan is now finalised and will be published shortly.
- Corporate planning work is progressing. Events for staff and Board are scheduled for 25 and 26 October when teams will share initial proposals and invite feedback. It is likely we will extend the deadline for the second phase of team input from December to January. This is to avoid overloading teams during autumn when budgeting and business planning also take place.
- A tenant was rehoused urgently due to structural instability in one of the assets under management.
- A summary of staff survey results for 2023 have been shared with all staff and discussed with PCS. Work is underway through the Collaboration Forum (Managers Forum) to co-create an action plan based on staff views to help address the most significant insights.
- The Fiscal Framework for Scotland has been renegotiated and under the new arrangement the revenues from Crown Estate Scotland (volatile income) will be netted down using the Barnett formula for Scotland (guaranteed income).



## 2. Health & Safety (H&S)

Development of the new H&S Management System (HSMS) is ongoing. Our H&S Advisor, EDP, has produced five draft management and operational procedures which are under review by Crown Estate Scotland. We are currently identifying resources to support this process. This is being done in parallel with reviewing of the existing suite of H&S policies as part of the annual review process. EDP has put a training proposal to Crown Estate Scotland to undertake Construction Design Management (CDM) training and this is being scheduled for all relevant teams.

Our H&S Central Committee had its quarterly meeting in August and discussed amendments to the existing policies, progress on the H&S Action Tracker, reviewing of the Terms of Reference, training needs and the introduction of the Wellbeing Hour.

Following the identification of structural defects at a property in Applegirth which led to propping works, an inspection on 14 August identified further deterioration in the structure. Tenants were informed on 15 August and have been moved to temporary accommodation. This issue is expected to result in unplanned expenditure of circa £0.75 - £1.0m.

The People team is progressing work to develop new guidance for social events, to cover both formal and informal events organised by both Crown Estate Scotland and by our staff. The intention is to make clear the distinction between informal staff events versus formal corporate events.

## 3. Risk Management

Further work has been undertaken in the last quarter to develop a refreshed approach to risk management, with a workshop taking place internally on 1 August. Initial conversations indicate that there is a need for the risk policy, risk appetite and strategic risk register to be updated. This has been informed by recent experiences relating to Montrose, Nigg and the Capital Challenge Funds which have tested existing arrangements. The Executive Team are working to bring forward revised changes in Q3-Q4. An illustration of the potential direction of travel and initial thinking was shared with the Audit & Risk Committee on 29 August.

As an organisation we are developing the language we use to articulate risk as we transition from the expiring corporate plan to our new plan and evolving operating / fiscal environment. New and emerging risks include:

- **Delivery risk:** we continue to struggle with capacity despite on-going recruitment activity. We are not always delivering business as usual activities as there has been a focus on trying to deliver the current, extended, corporate plan which has a bias towards activities out with the direct management of the estate.
- **Loss of capital value:** recent discussions with our Sponsor Team have highlighted that interest accrued on capital reserves held on deposit will pass to Scottish Government as revenue. With the current high levels of inflation, and interest rates sitting at c. 5%, this means capital monies held on deposit are in real terms devalued with the passage of time. As capital monies held on deposit are in law classified as the Estate, the Accountable Officer is now presiding over the loss of capital value from the Estate, which potentially represents a breach of the Act. The only remedy is to (1) deploy the capital on deposit into the existing Estate, which is a slow process,

(2) acquire new assets with a blended capital and revenue yield of  $c > 5\%$ , with a bias towards noncomplex and swift commercial transactions, or (3) a mix of Option 1 and Option 2. Responding to this risk / issue will require the existing investment strategy to be updated on an interim basis to take account of the shifting context in which Crown Estate Scotland is making capital investment and expenditure.

- **SG Enabling Partner for Offshore Wind:** until recently Crown Estate Scotland has expended its own revenue on offshore enabling activities. Following the confirmation that Scottish Government requires all £755m ScotWind monies for the Scottish Consolidated Fund and that any costs incurred by Crown Estate Scotland in enabling ScotWind will be paid for from these monies, which are now Scottish Government monies and no longer Crown Estate Scotland monies. We will move from being an 'independent self-financing enabler' in relation to offshore wind, to being an 'enabler on behalf of Scottish Government' with the activity funded using Scottish Government monies. This is a small but significant change. We will potentially be required to meet a higher level of transparency and benefits reporting in relation to this expenditure of Scottish Government monies moving forward and the Crown Estate Scotland staff involved will potentially have increased accountability to Scottish Government for delivery under a formal project structure. This development is consistent with the creation of the new Scottish Government Directorate dedicated to Offshore, Wave and Tidal, and the role Scottish Government will take in the strategic coordination of the Scottish Offshore Wind opportunity.
- **Asset failure:** The risk of built assets in the portfolio failing has increased due to a sustained period of under investment. In the last week we have been made aware of an unsafe structure that requires the urgent rehousing of tenants. This single example will likely cost  $>£0.7m$ . An aging estate, combined with under investment as a result of constrained capital deployment, and low internal delivery capacity, will see increased risk associated with the asset under management for the foreseeable future.

#### 4. Procurement

Following the sad news of the death of our Procurement Manager, Maurice McTeague, on 11 June we have sourced short term support from Scotland Excel to support procurement activity whilst we recruit for new roles to oversee and manage our procurement function.

During his three years with Crown Estate Scotland, Maurice was integral to the development of our Procurement Strategy and Policy and in ensuring we delivered the requirements of becoming a Contract Authority in 2020. Maurice will be sadly missed.

Several significant procurements are in train including commissions relating to organisational design and development, a pilot to determine the long-term (25+ yrs) total management cost associated with the Glenlivet estate, the review of the Capital Challenge Funds, the Long Term Asset Management System and the replacement arrangement for the Managing Agent (Lot 3 – Coastal) contract.

As reported to Board in March 2023, the Coastal Managing Agents is in the process of being retendered. The contract is currently below £750k annual revenue limit for Board approval however there is a possibility that any new contract could breach both this limit and the £950k limit for approval by Scottish Ministers, at some point during the term of the contract.

As this could be a possibility, in May, prior to the publication of the ITT in July, there were discussions with the Sponsor Team regarding the tender and what approvals process may be required for such a revenue contract. It was agreed that early feedback would be provided after receipt of tenders to ensure that any necessary approvals could be sought well in advance to meet the required contract award/mobilisation dates.

As reported previously, the options for the Long Term Asset Management System were being reviewed following the unsuccessful tender process earlier in the year. A refreshed ITT has been developed and due to the likely scale, there will be discussions with the sponsor team to ensure they are aware of the tender. It is unlikely that it will breach the internal delegated authority limits. The estimated contract is for, at maximum, £3M over a 12-year period but there will be a significant front loading of the costs for the system setup and migration in the first 2 years of the contract. Should the incumbent provider not be the successful bidder there will be a significant volume of resource required both within Crown Estate Scotland and our Managing Agents to participate in the project and manage the risk of migrating to the new system.

## **5. Insurance**

Our current provider RSA have noted that they are going to be withdrawing from our property cover at the end of March 2024. They have confirmed this decision reflects a change in their risk appetite rather than any problem with Crown Estate Scotland. We are in discussions with our retained Insurance Advisors to engage with the market and determine what information will be required to enable us to renew successfully with a new provider – this is likely to involve some survey work on reinstatement values across the estate. At the same time we will engage with the Sponsor Team to determine whether the Scottish Government have any views on whether we should take on some of the risk or continue to fully insure for the main risks (acknowledging the fact the costs associated with loss will ultimately flow to Scottish Government as the funder of last resort for the portfolio). Currently our cover for the estate extends to storm/flood cover only (along with Property Owners Liability) however we are looking to extend this to include fire risks as well at the request of the Accountable Officer.

## **6. IT and Cybersecurity**

In July we renewed our Cyber Essentials Plus certification. We are currently reviewing our System Information and Event Management solution and Cyber Testing contracts which end in 2024 and planning to publish an ITT later this year for the replacement contracts with some desired improvements. The ITT will prevent a bidder from being awarded both contracts due to segregation of responsibilities.

We are also in the early testing phase of our new Windows 11 build and looking to further tighten (harden) the build to make it more challenging for malware to run or hackers to otherwise exploit. This is being carefully balanced against ensuring the security controls do not compromise employee's productivity. We expect to have a pilot conducted before the end of the financial year.

We are currently looking at several separate procurement processes and looking to streamline and consolidate them while also improving their robustness. This was triggered by one of the key outcomes from the staff conference to reduce/streamline bureaucracy.

## 7. Corporate Affairs

In mid-May, working closely with colleagues in E&I, we announced that all five IN projects in the INTOG leasing round had secured Exclusivity Agreements. Other content and stories are at <https://www.crownestatescotland.com/news/current>

In June, we received our annual Scottish Local Government Leadership survey<sup>1</sup> from PA Advocacy. The headline findings were that:

- **Half of Chief Executives know a fair amount or more about Crown Estate Scotland.** Awareness has not changed in the past year. Three years ago, the clear majority said they knew a fair amount or more. Awareness of HIE and NatureScot is fairly similar. Almost all know a fair amount or more about SEPA.
- **A third of Chief Executives think favourably of Crown Estate Scotland.** Perceptions have not changed in the past year. However, most thought favourably of Crown Estate Scotland in 2020. No-one has reason to think unfavourably - instead most have no strong opinion either way. CEOs are more likely to think favourably of NatureScot, HIE and SEPA.
- **A little over a quarter of Chief Executives recall satisfactory contact with Crown Estate Scotland in the past year.** Just as many do not recall any contact in the past year – and would not have expected it. One CEO has had reason to have been dissatisfied with recent contact from Crown Estate Scotland.
- **Under half of Leaders know more than a little about Crown Estate Scotland.** They are less likely to say they know a fair amount or more than at this time last year. They are only marginally more likely to know as much about HIE and NatureScot. However, most Leaders are familiar with SEPA.
- **A third of Leaders think favourably of Crown Estate Scotland.** Leaders are no more likely to say they think favourably than at this time last year. However, only one Leader has reason to think unfavourably of Crown Estate Scotland. Half of Leaders think favourably of NatureScot and SEPA.
- An additional question we asked probed appetite for more engagement and the responses are now being followed up on. We are attending the SOLACE annual conference (14-15 Sep) and have a corporate planning workshop and meetings scheduled at the CoSLA conference (28-29 Sept).

In June, we began development of a refreshed Crown Estate Scotland website. The new site will offer:

- Improved user interface and navigation
- More flexibility in how content is presented
- A more robust platform which is more easily maintained

User acceptance testing will start in w/c 21 August. The site is scheduled to launch in autumn.

Work has been done with the Scottish Offshore Wind Energy Council's (SOWEC's) consultant to inform their wider communications plan about the sector and the opportunities presented by ScotWind and INTOG. This will complement our communications which will focus on matters relating to leasing, SCDSs and Crown Estate Scotland's enabling actions.

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<sup>1</sup> Available in Board library in Admincontrol

We will deliver an all staff event on 13 September following up on themes from the Spring staff conference as well as recent staff feedback.

## **8. Policy**

Following the public consultation exercise on Highly Protected Marine Areas, Scottish Government announced in June that they will not be progressing the proposals. We expect more information on a revised community-led approach to delivering enhanced marine protection to be available in Autumn.

In early August, Scottish Government published their response to the 2020 Parliamentary committee inquiry into the Development and Implementation of Regional Marine Plans in Scotland. One of the key points in the response is that Scottish Government will continue working with Orkney, Shetland, and the Clyde Marine Planning Partnerships on their Plans and with the Outer Hebrides where early work has commenced but no further partnerships will be established until the second National Marine Plan is adopted (scheduled for 2025).

The second three-year programme of the Sustainable Communities Fund (Community Capacity Grants and Environment Grants) was launched in August. A review of the first three years of the Community Capacity Grants is in the board portal. It is anticipated that the new corporate plan will include further development of this fund.

For the Community Capacity Grants, the budget has been increased to £300k per year. The overall purpose remains as follows:

- Create self-sustaining community enterprises that will promote sustainable development through the provision of local, social and/or economic benefits.
- Contribute to the regeneration of places through improvements to buildings or community spaces that will support self-sustaining community enterprises delivering sustainable development.

A new set of priorities will provide greater direction for applicants in regard to supporting wider well-being economy and community wealth building objectives.

The budget for Environment Grants has been increased to £125k. These grants provide support for tenants to deliver projects that can deliver demonstrable environmental benefits. The objectives are now more aligned with Scottish Government goals around nature recovery and net zero.

Criteria relating to Scottish Government's Fair Work First initiative have been incorporated into both grant streams.

A RAG review of progress in delivering our Climate Change Action Plan shows two actions out of 23 are currently marked as red - one relating to a carbon audit of Glenlivet Estate and one relating to exploring alternative fuel vehicles for the Estate team.

## **9. Partnerships**

Katie Alexander (Regional Engagement Manager for South Scotland) was promoted internally to take on the two year Community Land Accelerator Manager post on secondment, starting in

September. Meanwhile we have released initial information on our website and carried out early engagement with key partners. A draft engagement plan is in place and we are working alongside the PMO to establish project governance requirements.

The 'Glenlivet 2050' forward looking vision, options and actions work has moved forward with consultants Cumulus and Aecom being contracted to deliver Stage 2 of the overall project, joint funded by Crown Estate Scotland alongside Cairngorms National Park Authority, Moray Council and Highlands & Islands Enterprise.

We have continued to work with Comhairle nan Eilean Siar (Western Isles Council) to progress acceptance of the contractual terms offered as a Local Management Pilot, which they applied for jointly with Urras Oighreachd Ghabhsainn (Galson Estate Trust). CnES are now seeking an alternative approach with greater emphasis on enhanced communications.

The Fort William 2040 Vision programme manager, jointly funded by Crown Estate Scotland and The Highland Council, resigned from their post. The employer - The Highland Council - is now readvertising the role.

We have confirmed our three-year commitment to provide enabling funding for the Scottish Islands Federation (SIF) to support their project officers tackling marine litter. SIF have appointed two individuals - one will cover the areas of the Small Isles and West Coast and the other will focus on Orkney and Shetland.

## **10. Energy and Infrastructure**

A total of 45 applications were received during the first application window to the Strategic Investment Model (SIM) with 40 now asked for further project details to progress to the next stage. Following an assessment of further information, a suite of full and lite prospectuses will be developed by the Programme Manager (Arup) and they will then be assessed by each SIM Group Member for investment consideration and moving to Stage 2 of the process. As well as continuing to support this (for example, through progressing the appointment of Arup and contributing funding to this) and SOWEC, we also sit on the newly formed Scottish Government 'Offshore Wind Strategic Investment Short Life Working Group'.

The original 17 ScotWind projects have all now updated SCDS's within the April deadline. Outlook Statements have all now been published (<https://www.crownestatescotland.com/scotlands-property/offshore-wind/scotwind-leasing-round>).

The five IN Exclusivity Agreements and one TOG agreement have now been signed. Detailed discussions are underway with the remaining TOG projects re their Exclusivity Agreements. It is likely the TOG agreements that will be signed will be delayed to Autumn. We continue to work closely with developers and stakeholders to progress this.

Reports from both the UK offshore wind champion (Tim Pick) and the UK Electricity Network Commissioner (Nick Winser) have both highlighted the importance of UK wide, long term co-ordinated system planning to deliver UK net zero ambitions. Part of this includes consideration of the 'whole of UK seabed'. Crown Estate Scotland was one of a number of stakeholders that attended a 'seabed delivery partners' round table organised by The Crown Estate in July. It is



considered that this is an important area of focus for us moving forward in helping optimisation and prioritisation of Scotland's seabed.

There has been positive progress since the last Board update on the potential Nigg investment, with continued engagement with the landowner and other stakeholders resulting in the original structure of the agreement between Crown Estate Scotland and the landowner being the primary route being progressed again to move the project forward. Whilst challenges remain, conditional agreement was given by the Investment Committee to take the business case to the Board on 30 August. The timeline for Scapa currently follows behind Nigg, with HOTs with both the landowner and OIC being targeted for finalisation in the Autumn.

Over Spring and Summer, progress in construction continued for several offshore windfarm projects – Moray West commenced construction in April, Seagreen continues towards full commissioning whilst experiencing some delays/grid challenges and Neart na Gaoithe's delayed project expects to achieve first power this Summer.

We are currently developing partnership arrangements with The Crown Estate on the implementation of Marine Data Exchange for our offshore renewables tenants ([Marine Data Exchange](#)). Work is ongoing to agree the partnership details and we expect to announce it in the Autumn and launch access in early 2024.

There was positive news for CCS in Scotland with the Acorn project achieving 'track 2 status' with FID (Final Investment Decision) anticipated in 2024/25. Following NSTA's (North Sea Transition Authority) announcement for six potential new CCS licences being awarded, we are progressing work on developing new leasing terms and conditions and considering further CCS leasing. Ernst and Young have been appointed to develop and provide supporting information for our decision making, with the first of three stakeholder seminars scheduled for 17 August.

In Wave & Tidal (W&T) developments, an engagement survey was launched with industry regarding appetite and views on future W&T leasing. In relation to our MeyGen investment, work has commenced considering how we are best involved in this moving forward.

## **11. Aquaculture**

We have completed the first production reporting and rent assessment under the revised finfish lease terms. All but one tenant returned production reports on time, and early indications are that we are close to budget for anticipated revenue. The outstanding return (at time of writing) is one of our smaller trout producers.

On adoption of the revised terms, there are now only 11 shellfish tenants (of 73) that have yet to sign up to the revised lease terms. All finfish and seaweed tenants have done so. This is considered positive progress, and we expect to receive more as lease renewals/modifications or additional seabed interest requests come in as we will only agree to these if applicants (where existing tenants) sign up to the new terms for their businesses.

Crown Estate Scotland and the Marine Directorate of Scottish Government are now co-funding a Business Development Manager for the Scottish Seaweed Industry Association. Based on performance to date, we may increase our support to ensure that we and the Association can fully benefit from the opportunity represented by this resource.

Along with the Aquaculture Liaison Manager position at Fisheries Management Scotland and a proposal for a Farmed Shellfish Marketing Officer with the Scottish Shellfish Marketing Group hopefully coming to imminent fruition, Crown Estate Scotland will now support 'live' enabling interventions across all aquaculture sectors.

With more activity on the seabed, interaction and co-existence challenges increase. An example of this occurring is that Crown Estate Scotland has been in protracted discussion with cable and finfish interests in Shetland about co-existence measures at Yell Sound where both have development plans. We have now included Shetland Islands Council in the discussion to confirm a consensus that these parties reach an agreement, without which Crown Estate Scotland will not grant seabed rights until statutory consenting authorities have made their determinations.

The Scottish Government review of aquaculture regulation continues albeit there has been no direct communication for the Consenting Task Group on the topic since a February workshop, and therefore it is not clear what further progress has been made.

SEPA are consulting on their spatial management framework to control sea-lice infestations on farmed and wild salmon and seatrout stocks. We will respond at a more strategic level, with technical aspects addressed by those more directly affected.

The government have also now published their Vision for Sustainable Aquaculture (<https://www.gov.scot/news/vision-for-sustainable-aquaculture/>).

In the next quarter it is proposed that an 'aquaculture session' with Board members will be convened at a time to be confirmed where members can ask questions and discuss the Vision and other aquaculture areas of interest including regulatory review matters, alongside feedback on the revised finfish rent implementation which will have concluded its first iteration.

## **12. Glenlivet Countryside Management**

The focus during this period has been on engagement with guided walks being provided as part of Cairngorms Nature Festival and Moray Walking and Outdoors Festival. There was work with several groups from schools and a visit from Exeter University. Wilderness Foundation have visited multiple times during this period bringing high school children from disadvantaged backgrounds to work on resilience, wellbeing, and employability in a wilderness setting.

There was an Opening Day for the recently installed Mindfulness Trail with attendees from the local nursery, retirement home and Development Trust. On a larger scale there was an Estate Open Day with attendees getting a tour of the area with focused visits to farm, forestry, sporting, heritage, and conservation sites. This was followed by an evening event in Tomintoul Square with a range of conservation and community partners having a chance to share information with Tomintoul residents and visitors.

## **13. Coastal**

As mentioned above, the procurement process for the re-tender of the Coastal managing agent contract is underway. Tender documentation was issued on 24 July, the closing date for bids 1



September. The current timetable envisages evaluation of the bids by 22 September, interviews (if necessary) w/c 25 September, and standstill/unsuccessful letters being issued on 9 October.

#### **14. Rural**

On the farm sales pilot, all 16 Applegirth farms have been inspected along with all 6 Auchindoun farms. Draft valuations are well advanced and should shortly be issued for discussion with tenants and their agents, all in line with the timelines set out in the confirmation letters to tenants. All transactions, apart from the three agreed to be completed by 2025 due to specific requirements, are being advanced with a view to completion before March 2024. Turner & Townsend and Bell Ingram have been appointed to carry out the independent valuations and are working with Strutt & Parker to an agreed timetable.

Marketing of the Glenlivet Sporting lease opportunity was launched on Strutt & Parker website in July 2023 with a closing date of 6 September 2023. Bidders have been asked to complete an application form setting out their proposals along with references and supporting documentation. Key external stakeholders including parliamentarians have been updated and the team continues to work with Corporate Affairs on handling and messaging.

Two successful Farm Tenant Forum evening meetings were held in Fochabers and Moffat in May. These were more informal evening meetings at the farm tenants' doorsteps, following their feedback. Total attendance was in the region of 80 tenants. There was a good level of engagement with tenants, Crown Estate Scotland and Strutt & Parker staff looking at key opportunities and challenges faced by the farm tenants and exchanging ideas on where we could support tenants in future. Planning is already under way for the November meeting in Birnam.

We also hosted and facilitated positive engagement meetings between the Speyside Environmental Partnership during July along with SEPA, NatureScot, Spey Fishery Board, Gordon Castle Estate and Moray Council regarding River Spey flooding and erosion issues around Garmouth.

#### **15. Salmon Fishing**

Crown Estate Scotland has been invited to join the Scottish Government Salmon Strategy Implementation Plan Delivery group. This is to drive and oversee progress with Implementation Plan actions aimed at mitigating the crisis in wild Atlantic salmon populations. Led by Marine Directorate Fisheries team the group also includes representatives from FLS, SEPA, NatureScot, Fishery Management Scotland, The Atlantic Salmon Trust and three District salmon fishery Boards.

#### **16. Minerals & Mines Royal**

Progress was made with Scotgold rent & royalty arrears with part of the payment plan complied with. Following their publicised cashflow and operational issues at Cononish gold mine, we continue to work with our tenant to put in place a revised payment plan for the outstanding rent sums.

#### **17. Montrose ZeroFour**

A consultant was appointed to conduct a gateway review of the Montrose ZeroFour project with the report being received in May 2023. The report identified a number of areas of project governance and reporting which required attention and an action plan has been prepared to implement the recommendations of the report to ensure future compliance with the SPFM for all relevant projects.

In accordance with the recommendations, refreshed project governance arrangements have now been put in place under the leadership of an interim Senior Responsible Officer (SRO), working to the detailed project. The project team is also benefiting from independent consultancy support and guidance aimed at addressing the matters identified in the gateway review.

Work continues to be progressed on the refreshed environmental impact assessment for the site, ensuring existing planning consents are reinstated and as such the value of the site is maintained. A communications plan is also being developed to ensure engagement with stakeholders is being effectively managed as the action plan is being implemented.

#### **18. Whitehill Estate**

The Whitehill 2030 Development Framework and Vision is in final draft form. We are working with Midlothian Council to progress signature of MoU and establishment of Management Group to allow next steps in implementation of the proposed actions set out in the development framework to progress.

#### **19. Mosstodloch Masterplan:**

The Council presented the Final Draft Mosstodloch Masterplan 2040 to their Planning Committee on 31 May, with recommendation to enter into statutory consultations.

Moray Council published its long-term expansion plans for the area in June 2023. The public consultation runs until 28 August 2023. If approved by Moray Council's Planning and Regulatory Services Committee, the masterplan will be adopted as supplementary planning guidance and become a material consideration.

#### **20. Review of Development Land:**

Following the publication of National Planning Framework 4, several new Local Development Plans are being developed across Scotland. As part of this process, the team has started reviewing land across our estate which may be suitable for development. The emphasis is on supporting corporate objectives and delivering a positive, planned spatial strategy across the estate.

In July, the team submitted 37 sites with development potential for consideration as part of the 'Call for Ideas' consultation to inform the preparation of Moray Council's next Local Development Plan that will help shape the future planning landscape in the area. The Mosstodloch Masterplan 2040 (referenced above) will also be considered as part of the call for ideas consultation process.

The Whitehill 2030 Development Framework and Vision (referenced above) has been shared in confidence with Midlothian Council Local Development Plan Team for discussion as part of the 'Evidence Gathering' stage of their Local Development Plan Review process.

## **21. Forestry**

In August we hosted a project meeting with Spey Catchment Initiative to discuss riparian planting proposals as part of the Conglass Woodland project. This included Crown Estate Scotland agricultural and sporting tenants, Spey Fishery Board, NatureScot, CNPA and Strutt & Parker. This initiative was in direct response to a request from the local community and MSP Richard Lochhead's office.

We also undertook preparation work and liaison with UKWAS auditor from Soil Association ahead of the annual Forest certification audit in August and scheduled site visit to the Whitehill estate.

The next Forest Intern has been appointed and is due to start in September 2023.

## **22. PMO**

The development of the Project Management Office has primarily focused on understanding existing governance arrangements for projects, including major investments under the SPFM. The PMO has worked to support existing projects and setting new projects up for success. The next steps for the development of project governance are to centralise the function and ensure appropriate PM resource and training is provided within each functional area. The proposed governance structure forms the 'backbone' of the project management framework and will establish consistent project / programme management controls, processes, tools, and reporting methods across the organisation, while aligning with public sector project management assurance requirement. This represents an important development for Crown Estate Scotland in terms of improving organizational resilience and our ability to deliver.

## **23. Advance Notice and emerging issues**

There is increasing focus from NGOs and campaigners on activity that impacts the seabed, such as trawling. This represents a further example of the tensions that exist between the environmental agenda and economic agenda associated with the assets under management.

Conversations within Scottish Government regarding the reform agenda have recommenced. A series of engagements are scheduled for September which indicate the Scottish Government is open to creative and progressive solutions in relation to the use and management of land and property interests under Scottish Government management. Early indications suggest that both the Crown Estate Scotland (corporate body) and the Scottish Crown Estate may fall within the scope of the reform agenda.

## **24. New Opportunities**

In the last quarter Crown Estate Scotland has received a diverse array of offers associated with asset-based investment opportunities. Examples include:

- *SOSE asking if the Scottish Crown Estate can be used to support housing provision in the South of Scotland.*

- *SFT asking Crown Estate Scotland to join a cross-government initiative with other Scottish Public Bodies aimed at advancing an offsite net-zero housing pilot.*
- *A number of quasi-commercial investment opportunities were forwarded by our Managing Agents in response to the requirement for Crown Estate Scotland to deploy capital at pace on a commercial basis to counteract inflation.*
- *Scottish Enterprise (SE) flagging the requirement for investment in commercial space to support Offshore investment. N.B. We are now working with SE to identify specific opportunities.*
- *Scottish Government asking for participation in a group to advance Natural Capital on land 'owned' by Scottish Government.*
- *Anderson Strathern sharing investment opportunities in the East of Glasgow which form part of a larger placed based regeneration initiative.*

These various opportunities, combined with the requirement for Crown Estate Scotland to deploy the capital funds which it holds in the bank (which will soon increase further with the farm sales receipts) suggest the need for two practical actions. Firstly, the current investment strategy reflects a different fiscal environment, and it should be updated on an interim basis to reflect the current economic context and fiscal threats that are presenting at this point in time. Secondly dedicated and specialised resources should be onboarded to support active investment (this might take the form of external consultants or internal FTC staff).

# Board Dashboard – Q1 2023-24

## Business Plan actions

2023-24 Business Plan (42 green, 8 amber, 0 red)			
No	Measure	Status	Notes
5	Boat-based tourism challenge fund - Full business cases assessed, resultant investments under way and asset management agreements in place where investments complete	At Risk/Delayed	One FBC complete, one in final draft form. Remaining 5 to be drafted pending recruitment and completion of third party review.
16	ZeroFour Gateway Review completed, including implementation of any recommendations. Outline business case developed, delivery/exit strategy for project confirmed and progressed to implementation. Whitehill Masterplan developed in collaboration with stakeholders. Work with Moray Council to secure adoption of the Mosstodloch Masterplan as supplementary planning guidance complete.	At Risk/Delayed	ZeroFour and Mosstodloch Masterplan work on track. The Whitehill 2030 Development Framework and Vision is in final draft form. The Whitehill 2030 MOU objectives are agreed and shared in this public-to-public sector partnership working that will help deliver CES & Midlothian Council development objectives. We are working with Midlothian Council to progress signature of MoU and establishment of Management Group and key Project Governance to allow next steps in implementation of the proposed actions set out in the development framework to progress - Delays in recruitment of BDM (Mat leave cover) along with a shortage of resource in MLC has meant this has taken longer than anticipated to progress.
19	Natural Resources challenge fund - Full business cases developed and resultant investments and asset management agreements progressed	At Risk/Delayed	One SOBC completed (not yet progressing to FBC). Remaining SOBCs to be progressed subject to a third-party review.
20	Re-letting opportunities progressed, targeting new entrants. Contribution to the work of Scottish Government's Farming Opportunities for New Entrants continued.	At Risk/Delayed	No opportunities identified yet. Contributing to FONE group meetings.
22	Ongoing monitoring work of restoration on Faemussach site undertaken. Programme of peatland restoration work (through Peatland Action on Glenmuillie) prepared and submitted.	At Risk/Delayed	Annual monitoring report of Faemussach site produced in May 2023. Wider peatland work with CNPA Peatland Action team - CNPA looking to appoint consultant support.
26	Local Partnerships challenge fund - Full business cases developed and resultant investments and asset management agreements progressed	At Risk/Delayed	One FBC complete. Remaining two to be drafted pending completion of the third-party review.
40	Ongoing work on title conflicts relating to Crown Estate Scotland-managed foreshore progressed. Registration of Fochabers Estate progressed.	At Risk/Delayed	Ongoing case work on title conflicts. Preparing Inverness or Ross and Cromarty foreshore voluntary registration paperwork for submission, subject to resourcing support. In the process of reconstituting a project team to complete foreshore registration and continue rural land registration.
54	Gap analysis and costed delivery plan developed.	At Risk/Delayed	This work has yet to be started.

## Finance

Finance and Capital Committed information will be provided as soon as possible

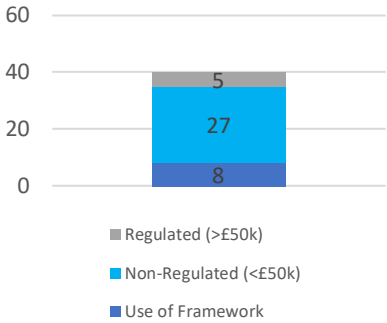
## Property

Vacant, marketable properties:  
Rural: 2 Urban: 0

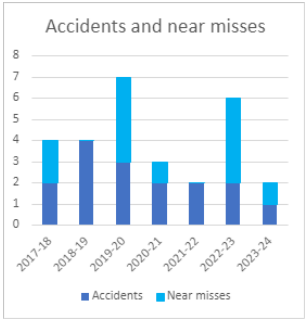
## Procurement

133 contracts LIVE on register, 19 are regulated

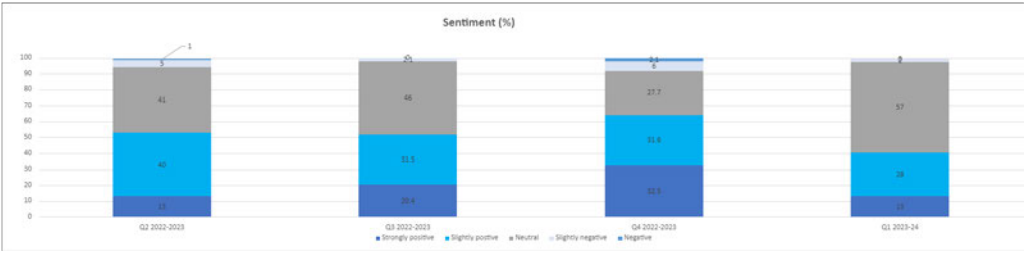
New Contracts Awards by Type  
2023-24 YTD  
(Q1 = 40) (YTD = 40)



## H&S



## Media sentiment and digital users



Key positive media story:  
INTOG winners

Most negative media story:  
ScotWind impact on wildlife

Digital users	Q2 2022-23	Q3 2022-23	Q4 2023-23	Q1 2023-24
Twitter (impressions; +/- followers)	96k; +172	23k; -9	27k; +26	30k; +16
Website visitors	26,802	19,797	25,052	20,000
LinkedIn (impressions; +/- followers)	83k; +890	51k; +506	47k; +635	75k +763

## FOIs

Requests received:  
Q1 13

Topics include:

- Foreshore ownership queries
- Costs of Bidwells
- ScotWind applicants' documentation

## KPIs

KPIs: 7 Green, 1 Amber, 1 Red	Q1 YTD (Draft)	RAG Rating
Total Capital Committed (£)	15.5M	
Place Based Capital Committed (£)	10.7M	
Blue Economy Capital Committed (£)	4.8M	

## Board Q1 2023-24 Dashboard – Notes

### Business Plan – reporting by exception

<b>Amber status</b>	At risk / delayed.
<b>Red status</b>	Target missed / abandoned / will not be reached.

### KPIs

Dashboard table relates to Corporate Plan KPIs. Most are tracked annually through the annual report except for capital committed which we report on quarterly, broken down as below.

KPI	Definition	Corporate Plan 2023 target	Notes
Total capital committed	All capital committed in 2020-23 through approved final business cases and case sheets	£70m	Excludes feasibility and business case development costs.
Capital committed to place-based projects	Capital committed in 2020-23 through approved final business cases and case sheets for buildings & places	£27m, indicative	This relates to the objective: Invest in buildings and help create great places.  Assets: Built Environment.
Capital committed to blue economy	Capital committed in 2020-23 through approved final business cases and case sheets for blue economy	£26m, indicative	This relates to the objective: Support the sustainable expansion of Scotland's blue economy, focusing on marine and coastal development  Assets: Mainly Marine and Coastal, but also including projects in Built Environment with direct links to the blue economy.

Please note that the figures provided for Q1 YTD are in fact those from 20220-23 Q4 due to data not being available at time of publication. Figures will be provided at the earliest possible opportunity.

**Procurement****New Contract Awards by Type**

Contracts awarded YTD – total number plus categories.

Graph depicts the cumulative number and type of contracts awarded during the reporting period.

The total number of live contracts currently on the register is provided for context.

**Stakeholder/Reputation****FOI**

Number of requests for information, as responded to under the Freedom of Information (Scotland) Act 2002 and the Environmental Information (Scotland) Regulations 2004.

**Media**

Sentiment by quarter on rolling 12-month basis.

Most positive and most negative story

Digital communications metrics showing change on previous quarter.

**Health & Safety**

Accidents and near misses YTD.

**Finance**

Please note missing finance information this quarter due to data not being ready to publish by the submission deadline.

## Board Paper

**Date of Meeting:** 30 August 2023

**Classification:** Unrestricted

**Subject:** Stakeholder Meetings

**Paper Number:** BD(2023)36.9

**Recommendation:** The Board is invited to note this paper.

**Presenter:** Helen Howden

**Author:** Rebecca Finnie

**Our purpose: Investing in property, natural resources and people  
to generate lasting value for Scotland**

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### 1. Purpose and context

This paper provides the Board with details of the meetings and events which the former Chair, the current Chair and the Chief Executive have held with stakeholders during the period from 13 May to 18 August 2023.

This paper also now includes a summary of other stakeholder engagements and events.

### 2. Meetings and Events attended

The former Chair and Chief Executive both attended or met:

- Katrina Wiseman from HIE Shetland in Lerwick on 19 June.
- Shetland Council CEO Maggie Sandison and Council Leader Emma Macdonald in Lerwick on 19 June.
- Tavish Scott, CEO of Salmon Scotland and Salmon MDs in Tankerness, Orkney on 20 June.
- Cllr James Stockan and Oliver Reid, CEO of Orkney Islands Council, in Kirkwall on 21 June.
- North Ayrshire Council on 29 June. Katie Alexander also in attendance.
- Ms Gougeon for an introductory meeting on 29 June.

The former Chair attended or met:

- A Board Chairs Information Session – Public Service Reform Programme on 31 May.
- The IoD Director of the Year Awards on 8 June where a colleagues was nominated for an award.



The Chief Executive attended or met with:

- Bobby Sandeman, Head of Dept and a team from King's Lord Treasurer and Remembrancer on 16 May to discuss community bodies. Alastair Milloy, Esther Black, Tom Mallows and Katie Alexander also in attendance.
- Farm Tenant Forum – North on 18 May with members of the Property team and Jean Lindsay.
- The Portfolio Lead Malcolm Pentland and Carla Plasberg-Hill from the sponsor team on 19 May, 16 June and 18 August.
- The Sponsor Team on 22 May and 10 August to discuss Business Cases. Alastair Milloy and Andy Riley also in attendance.
- Gregor Irwin, Director General Economy for an introductory meeting on 23 May.
- The Economy and Environment Leaders Group on 25 May.
- Farm Tenant Forum – South on 25 May with members of the Property team and Jean Lindsay.
- A special reception on 26 May at the Old Irish House of Lords in Dublin for the award of the Robinson Medal for Science to Astronomer Royal, Martin John Rees, Baron Rees of Ludlow.
- Neil Rutherford, Associate Director, Scottish Futures Trust for a catch up on housing on 30 May. Tom Mallows and Paul Devine (SFT) also in attendance.
- Edward Mountain, Convener of Scottish Parliament's NZET Committee on 31 May.
- Jane Morrison-Ross, Chief Executive of South Scotland Enterprise on 31 May.
- Kate Lackie, Interim Chief Executive, Highland Council on 8 June.
- Helen MacInnes of Fortescue Future Industries Ltd on 8 June.
- The Sponsor Team on 12 June and 14 August. Esther Black, Alastair Milloy and Annie Breen also in attendance.
- Alex Macleod from Stornoway Port Authority on 13 June. Colin Palmer, Paul Bancks and Oster Milambo also in attendance.
- A ScotWind Revenues meeting with Scottish Government on 14 June. Helen Howden, Andy Riley, Colin Palmer, Esther Black, Alastair Milloy and Anna Morgan also in attendance.
- Gary Jebb, Director of Estates & Buildings, Edinburgh University on 15 June.
- Hamish Trench, CEO of the Scottish Land Commission on 26 May and 16 June.
- Sheila Duncan from Lerwick Port Authority, in Lerwick on 19 June.
- Representatives of EMEC and Orbital whilst in Orkney on 21 June. Caitlin Byers also in attendance.
- A liaison meeting with the Sponsor Team on 23 June. Alastair Milloy and Anna Morgan also in attendance.
- A net revenues meeting with the Sponsor Team on 23 June. Anna Morgan also in attendance.
- The Offshore Wind Strategic Investment Short Life Working Group on 27 June and 25 July.
- Colin Proctor, Asset Management Director, Scottish Futures Trust on 4 July.
- Stephen Good, Chief Executive of BE-ST on 4 July.
- Professor Russel Griggs, Chair South of Scotland Enterprise on 10 July.
- Ross Martin, Adviser on Regional Economies at ScotIncGrowth on 11 July.
- A meeting with the Sponsor Team regarding Crown Estate Scotland's Revenue to Capital Transfer on 9 August. Alastair Milloy and Helen Howden also in attendance.
- Peter Reekie, CEO, Scottish Futures Trust on 9 August.

### 3. Other engagements and events

Recent events:

- Renee LeFrancois, Information Advisor, hosted a network group on 22 August for Scottish public body freedom of information practitioners, attendees included individuals 38 bodies as well as from the UK Information Commissioner and the Scottish Information Commissioner.
- Recent meetings between Directors and MSPs include Michael Marra MSP (Esther Black & Colin Maciver) and Sarah Boyack MSP (Esther Black & Colin Palmer).
- Crown Estate Scotland sponsored (and Gillian Morrison spoke at) the SCDI Forum annual conference on 6 June.

Events coming up include:

- We are sponsoring and attending the DTAS conference on 29-30 August and the CoSLA conference on 28-29 September.
- SCDI Highlands & Islands Business Excellence Awards, 14 September 2023 – Euan McVicar attending. Crown Estate Scotland are sponsoring an award of Outstanding Supporter of Coastal Communities.
- Herald & GenAnalytics Diversity Awards, 12 October 2023 – Liz Leonard attending. Crown Estate Scotland are sponsoring the Diversity in Net-Zero Leadership Award.