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SCOTTISH RURAL PROPERTY AND BUSINESS ASSOCIATION

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SCOTTISH ESTATES BUSINESS GROUP

Public Attitudes towards Estates in Scotland Report of Quantitative Research Findings



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EXECUTIVE SUMMARY

Over the course of the last two years, George Street Research has been carrying out an extended programme of research on behalf of SRPBA and SEBG. The research comprised a series of eight focus groups across Scotland – in Dingwall, Glasgow, Peebles and Perth. This was followed up a quantitative survey of 1,135 adults (16+) in Scotland.

The findings of this research suggest that land ownership per se is not a top-of-mind issue for the general public and that limited consideration is given as to what land, or how much land, is privately owned. Whilst there is widespread enjoyment of Scotland's rural land, and some pride in its natural and cultural heritage, **the occasions when ownership becomes an issue for the public appear largely limited to incidents relating to access.** For a majority these incidents are few and far between and often relate purely to high profile media stories, often linked to some form of celebrity status.

Evidence of a lack of awareness and understanding of land ownership is supported when we assess estimates amongst the general public of the actual amount of land which is privately owned. Thirteen per cent suggested 30% or less of Scotland's land mass is privately owned, with 20% suggesting between 31% and 50%. Almost half of all respondents (46%) suggested more than 50% of Scotland's land is privately owned and a fifth (21%) were unable to provide an estimate.

There appears to be widespread understanding that there *are* "rights and wrongs" of land access and behaviour, although detailed understanding of the Land Reform (Scotland) Act or what is meant by the "Right to Roam" is very limited. **A majority of qualitative research participants feel protective of the land, place a real value on their access to it and are accepting and encouraging of responsible behaviour from all land users and owners.**

There is an evident appreciation for the rural landscape amongst the Scottish general public and perceived need for ensuring some form of custodians are in place to tend to it. Ninety-four per cent agree that *Scotland's rural land and countryside is an important part of our tourism offering.* A similar proportion (93%) agrees that *Scotland's rural land and countryside is an asset for everyone who lives in Scotland.* The majority (86%) agree that *sustainable rural development is important to the social, economic and environmental prosperity of Scotland.*

Importantly for SEBG, SRPBA and their members, **the research shows that actual management and maintenance of rural assets tends to be taken for granted or assumed to be largely a function of nature.** Few would think to question how Scotland's countryside would look if left untended and land owners are unlikely to receive spontaneous credit for the responsibility that they take for land management.

Once prompted to think about land owners or estates, many revert to a stereotypical image of the "Monarch of the Glen", focusing on individuals or families and a perhaps outdated and romantic vision of estate activities. This is not in the main a negative perception; indeed, the findings suggest that the public rather treasure a traditional view of estates and their owners. It is more likely to be news of absentee landlords, foreign buyers or celebrity landlords that prompt criticism or negative comment, either linked to issues of access or to perceived lack of hands-on interest and involvement.

The wide ranging activities of estates or their contribution to local communities is little known or understood, although the benefits are largely accepted as credible and worthwhile. Indeed when asked to say how much they know about the roles or activities of Scotland's estates and landowners, only 1% of Scottish adults said they knew "a great deal". **Almost two thirds (65%) said they knew "very little / virtually nothing" or "nothing at all"**. Seven per cent said they knew "a reasonable amount" and 18% said they knew "a little".

The best known facilities and attractions offered by any estates in Scotland are castles/ancestral homes (67% aware), followed by more typical "rural" activities such as fishing (67%), nature trails (62%), walking (59%) and hill-walking (55%). In terms of visits or use, castles / ancestral homes are the most popular (35% claim to have visited in the last year) followed by farm shops and walking /rambling (cited by 26% each).

Research participants were often quick to comment that these are all messages that estates should communicate more proactively to the public at large. There are no signs of particular negative feeling amongst the public that need to be addressed in communication.

The messages that generate the most positive response amongst a majority of the public relate to "sharing" (access to) well cared for natural resources and

to provision of tourism and leisure facilities. These messages translate to real benefits for local residents and the local community, combined with a broader national interest in terms of “tourism is everyone’s business”. Indeed, across the population, there is widespread agreement that *development of facilities such as golf courses and tourism attractions on Scottish estates helps support our tourism sector* (82% agree).

Potential ‘harder’ commercial messages about economic contributions and business activities per se lack immediate salience for many respondents, although economic considerations and benefits are recognised at a secondary level.

These findings are encapsulated in the responses of research participants to a range of straplines that might be associated with landowners and estates in Scotland. **The phrases that prompted the most positive reactions included:**

- ***Sharing Scotland’s (Rural) Heritage***
- ***Providing free access for all in the Scottish Countryside***
- ***Enjoy Scotland’s countryside***
- ***Welcoming people to Scotland’s countryside***
- ***Caring for the Scottish Countryside***

The concept of “caring” was demonstrated by the term *Custodians of Scotland’s Countryside* and this was a very positive message in terms of sentiment, although the term “custodian” per se was thought to have connotations of pretentiousness and ‘aloofness’.

Group participants were asked to consider the ways in which these messages would be best conveyed to the public at large and a range of important channels was identified. **The most important channels for communication are consistently thought to be through “education” (links with schools), local press, television and word of mouth (ambassadors).** Local residents who have personal knowledge and experience of positive contact with estates and landowners, as well as employees of estates, all have potential to be strong ambassadors. In addition, the benefits of electronic communication and links with, for example VisitScotland, are thought to be important in conveying information relating to tourism and leisure activities.

In conclusion, we believe the most positive messages to build and enhance the public's perceptions of estates and landowners relate to sharing and caring for Scotland's natural resources. These very real benefits are already understood and appreciated by a large majority on a sub-conscious level. Positive and pro-active marketing and communication, on both a generic and an individual level, should be used to gently challenge the "take-it-for-granted" attitude and raise top-of-mind awareness of the very real contribution of estates.

On the basis of these research findings, our recommendations for future marketing and communications are summarised below:

- At a local (individual) level, use personal contact, local press and ambassadors (estate staff) to foster a sense of caring and sharing of natural resources. This should include pro-active announcements of specific initiatives / contributions such as open days, support of local events etc; Anyone perceived as "representing" an estate should be mindful of all local contact, whether formal or informal, as an opportunity to convey a sense of welcome, shared benefit and shared responsibility.
- At a local level, use physical signposting wherever possible to actively script and direct the public's welcome.
- At an individual level, foster and actively promote links with schools and young people that can build awareness of the countryside, educate on the wide-ranging roles and contributions of estates and landowners and engender positive appreciation amongst future generations.
- On a national level, use positive PR opportunities to counter occasional media comment on negative issues surrounding access to land.
- On a national level, seek to develop a consistent branding / communication device such as one of the straplines tested in research that can be used in support of individual estates' brands. The collective weight created by consistently using the same phrase or message will benefit all members in the long term.

BACKGROUND AND OBJECTIVES

The Scottish Estates Business Group (SEBG) represents progressive rural estates with significant business interests and the SEBG membership comprises around 20 of the major rural estates in Scotland. The organisation promotes the vision and interests of its members to policy makers and a broad spectrum of stakeholders. Members subscribe to a Code of Good Practice and work in partnership with others to help maintain a vibrant rural economy. Overall, SEBG seeks to manage Scotland's rural assets in a way which is economically, environmentally and socially sustainable.

The Scottish Rural Property and Business Association (SRPBA) represents the role and interests of those involved with rural property and businesses connected with the land. The organisation aims to bring together those whose homes, interests and businesses are found within the Scottish countryside and rural settlements and to represent its members' interests at the highest level. It further aims to contribute to the formulation of rural policy, promote rural enterprise and rural development in Scotland and work with government and other organisations, to achieve mutual objectives. Importantly, it also seeks to demonstrate the wider benefits of its members' activities to the community and to the Scottish rural economy.

SEBG and SRPBA jointly identified a need to commission independent and objective research amongst the general public in order to gather properly researched information (hitherto unavailable) which could better inform decision-making and strategic thinking for future land use in Scotland.

As two organisations' with significant involvement in delivering best practice in future land use across much of Scotland, the organisations felt such research would be a useful contribution to their overarching strategy to promote an appropriate, modern and integrated approach to future land use and management and to achieve enhanced, sustainable, economic, social and environmental benefit for the wider Scottish rural economy

The two organisations commissioned George Street Research, an independent market research agency based in Scotland, to undertake an extended programme of exploratory research over the course of two years to fulfil the following broad objectives in order to guide the development of communications:

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- ✓ To gauge awareness and understanding of the role and contribution of estates amongst a broad cross-section of the general public in Scotland;
- ✓ To assess current perceptions of, and attitudes towards, estates in Scotland;
- ✓ To understand key messages and drivers with potential to build and enhance the public's perceptions of estates e.g. green agenda, built heritage agenda, economic impact;
- ✓ To identify appropriate styles, tones and channels for effective communication with the general public.

METHOD AND SAMPLE

The research was carried out through two distinct stages – the first a qualitative assessment of public perceptions and attitudes. The findings from this aspect were then fed into the development of the second stage; a quantitative survey of the population of adults (16+) in Scotland.

Stage 1: Qualitative Focus Groups

Due to the exploratory nature of the research, a phased qualitative approach was adopted. A total of 8 focus groups were conducted across the project as a whole, covering a broad demographic mix of consumers in four geographic locations. These locations were chosen to provide a broad regional spread and to encompass a balance of urban and more rural communities.

Following discussion at an inception meeting with representatives of SEBG and SRPBA, the first two locations selected for focus groups were Peebles and Dingwall. Two groups were held in each location.

In each location, one group was held with members of the public who appeared to hold largely positive attitudes towards Scotland's assets (in terms of land, sites of cultural, historic and leisure interest and so on) and one group was held amongst people who appeared more negative in their views. A copy of the recruitment questionnaire used to identify and classify these groups is appended to this report.

The make-up of the first four groups was as follows:

	Dingwall	Peebles
Under 30	-	1 group C1C2 (negative)
25 – 39	1 group C2DE (positive)	-
40 – 54	-	1 group ABC1 (positive)
50 +	1 group ABC1 (negative)	-
Total	2 groups	2 groups

On completion of these first four focus groups, informal de-brief meetings were held with representatives of SEBG and SRPBA. Following discussion at these meetings, it was agreed that the next two focus groups should be held in a City location (suburbs) and the Clydebank district of Glasgow was selected. Based on the findings from the earlier groups, modifications were made to the discussion guide for

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the Clydebank area and additional stimulus material was introduced in the form of “straplines” for testing with consumers.

The Glasgow groups were structured as follows:

Glasgow	
16 – 30	1 group C1C2 (negative)
45 – 59	1 group ABC1 (positive)
Total	2 groups

A further meeting was held with representatives of SEBG and SRPBA to feedback on the findings from the Glasgow groups and further modify the discussion guide prior to the final two focus groups. These last two groups were held in Perth and were structured as follows:

Perth	
25 – 44	1 group C1C2 (negative)
45 – 59	1 group ABC1 (positive)
Total	2 groups

To summarise, across the project as a whole, groups were held in Dingwall, Glasgow, Peebles and Perth and encompassed all socio-economic groups and age ranges from 16 up to 50+. Each focus group included a mix of men and women.

Stage 2: Quantitative Survey

After SEBG and SRPBA had had the opportunity to consider and review the findings from the qualitative research, George Street Research were commissioned to carry out some follow-up quantitative research amongst the Scottish public. The questions for the quantitative survey were included in the March 2010 fieldwork on George Street Research’s quarterly Scottish Nature Omnibus. A total of 1,135 interviews were completed on the Omnibus survey, including a boost of 100 extra interviews with respondents in ethnic minorities. The figures in this report are weighted on ethnicity to provide data that reflects the Scottish population as a whole and the table below details the effective sample profile.

The interview points were selected so that the sample is representative of Scotland’s population in proportion to the Scottish Government’s six-fold urban/rural classification.

Sample Profile			
Base: All Respondents	(1,135) Unweighted No.	(1,135) Weighted No.	(1,135) Weighted %
Male	555	552	49
Female	580	583	51
16 – 24	199	188	17
25 – 34	167	150	13
35 – 44	199	192	17
45 – 54	187	191	17
55 – 64	174	186	16
65 +	209	227	20
AB	213	218	19
C1	343	336	30
C2	187	195	17
DE	392	368	34
White / British and Irish	988	1095	96
Minorities	147	40	4
Disabled: Yes	128	133	12
Disabled: No	1006	1001	88

MAIN FINDINGS

This main body of our report is split into two main sections – the first highlighting the issues raised during the qualitative fieldwork and the second highlighting the key findings from the quantitative survey.

1. Qualitative Findings

This section splits the qualitative findings into four subheadings – the first focuses on the public’s “top-of-mind” awareness and attitudes towards land, its ownership and the ways in which it is managed. In the second and third sections we discuss understanding of the activities and roles of estates and their impact and importance to local communities and the wider population. Finally, we examine issues relating to communication in terms of information sources and the ways in which SEBG and SRPBA can most effectively convey appropriate messages to the general public. A copy of the topic guide used for the focus groups is appended to this report.

A Spontaneous Views on Scotland’s Land, its Ownership and its Management

In our recruitment of respondents to participate in these focus groups we deliberately sought to identify members of the public who held either positive or negative views about Scotland’s assets in terms of the land, sites of cultural, historic and leisure interest and so on. It became apparent from the very earliest focus groups that for most respondents, regardless of the value they place on rural assets, the actual ownership of the land is given very little consideration and is not a “top-of-mind” issue unless prompted by specific events or information.

In the course of the discussions it did, however, become evident that those respondents who had been recruited because of the positive value they place on Scotland’s rural assets are, if anything, more likely to have criticisms or concerns about the way the land is used and managed than the “negative” groups. The “positive” respondents tended to be regular users of the land – usually for walking – and to be more aware of any changes that might impact on the land and their use of it.

“Well I'm a keen fisher and shooter and I live in the middle of nowhere, so for me it (the land) plays quite a .. It's an important part of my life”

(Dingwall)

*“I've almost been, lived basically in the country until, likewise, until we moved into the town and yes, the land is **very** important to me. I dog walk, we are five minutes from the River Tay and it is absolutely fantastic, brilliant.”*

(Perth)

“I've a part-time job working with the elderly who have dementia and stroke problems. And taking them out is one of the biggest things, or most important things, I feel that I do in that it's the most appreciated. Many of them spent their lives just trekking around the hills here and out all the time, and so I get them out and walk them and stuff. If they can still walk, we walk, and then if they can't walk I wheel them around on the Tweed. And that's really very important for them.”

(Peebles)

The value that these respondents place on the land around them heightens their sensitivity to any changes and makes them more actively interested in issues relating to the land and local land specifically. As the following verbatim comments indicate, continued access, preservation and maintenance of resources is often the top-of-mind priority for these respondents. They are acutely aware of anything that threatens to spoil the resources they value, regardless of where responsibility might lie, and protective of the land around them.

“I live near the Cuddy, which is a small stream – tributary – to the Tweed, and there's a friend of mine [who] organises the Cuddy action group which does a lot of really, really good work about keeping the Cuddy clean, and has looked into ways of developing the land and watching that Brown Brothers doesn't take more than what they should for the natural land and stuff like that.”

(Peebles)

“I've noticed a big deterioration in the public footpaths and the right of ways going through field edges as well. You know, with the farmers

ploughing up the fields, so you are getting less foot path. It is supposed to be about six foot wide for the old horse and cart tracks, they're now down to like that and you are hard up against the fence ways and that. So that is just your farmers regaining more and more ground and they are not actually entitled to use that ground."

(Perth)

"There is a wee route between the back of Bankfoot on the back roads and I used to take the dog a walk there and then people started fly tipping there and then they ended up having to close access to the walk, because people were using it as a fly tip. So it was a great wee route and there wasn't that many people used it, but then fly tippers started using it and that was the end of it."

(Perth)

In contrast, our "negative" respondents i.e. those who did not appear to place any particular value on rural assets, were seldom concerned or critical about any issues relating to the land. Instead, they were unconcerned, uninvolved and largely apathetic about the topic, taking the land for granted and giving ownership, management and usage very little consideration.

"Generally never give it a second thought to be honest. The countryside, I normally just presume keeps itself to itself. The sheep just keep the grass short and everything else just does its own thing, so never give it a thought at all."

(Perth)

As indicated by the above quotation, "maintenance" and responsibility for maintenance is another topic of limited consideration amongst those who are less interested in the land and place less personal importance on its value to them. For a majority of respondents (not all) there is a tendency only to notice when land has been, in their view, "poorly maintained" – e.g. trees have been felled or land "sold off" to developers. A minority, usually through personal contact with friends or family living or working on estates, recognise the work involved.

"... was brought up on an estate, and like I've been over and I've seen the way of life, and the work that goes in to it. You know, you think

the trees are just there... but they're not. They're looked after. And we've been out there planting these trees, like all day every day for days on end, and deer fence to manage the grass and pastures and.. There's massive amounts of work in it.

(Dingwall)

For many respondents, there is usually only consideration of maintenance in a positive context in relation to “spectacular” landmarks and heritage such as “stately homes” or themed / feature gardens that are open to the general public.

Regardless of the apparent importance of rural land in respondents’ lives, the issue of access to land was a common and recurring theme across all of the eight focus groups. For those who particularly value their access to rural land, there is an acknowledgment of the need for responsible behaviour in return for the benefits and privilege that access affords. Almost all respondents, including those in the “negative” groups, understand that there are “rights and wrongs” although detailed understanding of the Land Reform (Scotland) Act or what is meant by the “Right to Roam” is hazy.

“I’ve read the whole book about rights of access and it’s still not really clear, it’s all kind of hedged with things”

(Perth)

“The country code. You’ve got to keep gates shut. You’ve got to respect the land. You’ve got to stay .. You don’t walk through the middle of a field. You walk to the edge of a field. And that’s actually .. I think that’s a new law that’s passed not that long ago”.

(Dingwall)

Once group participants were prompted to consider the issue of land ownership, they showed wide ranging degrees of knowledge and understanding about local land and rural Scotland more generally. In Glasgow particularly, respondents found it unclear what might be privately owned and, in many cases, sites of historical and cultural significance were automatically assumed to be owned and managed by Scottish Natural Heritage. In other areas there was uncertainty about land that might or might not be owned by the Forestry Commission.

“Last summer I had the pleasure in going to a place I never even knew existed, it was on the way out to Aberfoyle. They took us to this place and people stayed for the weekend and it was owned by ... I think it was the National Trust. It was a beautiful big house with fabulous grounds and I just sat at the back for a couple of hours at lunch time, I just got lost in it. It was absolutely stunning and I can't even remember the name of the place.”

(Glasgow)

Even when prompted to think about private ownership, few respondents initially used the phrase “estates” often referring more to “farmers” as owners of rural land in their area. Once the word “estate” is introduced it tends to conjure an entirely different image in respondents minds, either through focus on specific – usually very large – estates that are known to them, or a more generic vision that is invariably linked to the “Monarch of the Glen”.

“Quite a lot of big estates, if they've been in the family and they've been handed down, and maybe they'd have had a lot of money – the family had a lot of money years and years ago – now it's maybe struggling to keep an estate, and having to find ways of either farming or just doing. I don't know what sort of activities they might be doing, but .. shooting or whatever, to try and make money from different ways to keep an estate. I wouldn't imagine it would be very cheap.”

(Peebles)

“There's very few of us here, if anyone, who's ever come into contact with a landowner, so we're drawing just on what we imagine them to be like... to a certain extent we're also taking the mickey a little bit.... It would be nice to think they weren't like that.... But they don't “mix” with the likes of us. “

(Glasgow)

“Landed gentry, then you probably think of a business after that. The other thing that comes to mind in Scotland these days is the absentee, generally your Arabs and all the rest of it making tracks in the north of Scotland and what have you. You can't pass comment if it's a good thing or a bad thing. From the outside it doesn't seem good.”

(Perth)

As noted in the above quotation, the issue of absentee landlords – often perceived as Londoners / “city businessmen” living away from the land and using it only for “*shooting and the like at the weekend*” – tends to provoke a negative response. This is typically fuelled by media comment, often when an estate changes hands.

“It’s generally when the estates are sold, that they make an issue, a headline out of who it’s been sold to, the issue is it a good thing or not, going outside the country.”

(Perth)

There was a fairly widespread feeling conveyed by many respondents that they prefer to think of landowners as being closely involved with their estates, valuing and nurturing them in a very individual and personal sense. Whilst there is recognition of commercial needs and drivers in estate management, the more romantic family vision springs readily to mind and holds appeal for members of the public.

Further, for respondents who have actually come into personal contact with local landowners the experience has been a positive one, particularly when there has been a sense of welcome and pleasure in sharing the land.

“I was walking in Alvie Estate, near Aviemore, and I happened to meet the laird in the big house, and he was just like ‘It’s great to have somebody on the land here. What do you think of the place? What do you think of what we’ve done here and there?’ and ‘Would you like me to get the Ghillie to show you around some more?’, and it was absolutely great.”

(Dingwall)

Media comment serves to heighten awareness of high profile or celebrity landowners and this is often associated with perceptions of reduced access to land for the public at large. In two or three focus groups there were references to Billy Connolly or Anne Gloag reducing public access and this works against the preferred romantic image of landowners, although there is some sympathy with the reasoning.

“Anne Gloag has blocked the right to roam across her estate, because she fears for her personal safety and that of her grandchildren. I think that is one of the first cases, I don’t know if it is the only one as well,

where someone has been allowed to actually erect a fence right round the estate and keep people out of it.”

(Perth)

One or two respondents have picked up on other media coverage relating to issues of access and for those with little or no direct contact with estates or landowners, there is a tendency to assume that this is a common occurrence.

“There was one of the news last week though was it Speedy or Smiley he bought a big estate, I think it’s waste management company. He bought a big estate and they got, the ramblers beat them in court so they could get access, because they shut those big gates, they have shut the gate and not let anybody access and the ramblers won. So that they had to, they couldn’t walk within, they were wanting no rambling anywhere near the house, within two miles or something like that, but they said no ‘you’ve got 500 yards’, the judge said that’s plenty. So there’s cases going on all the time.”

(Glasgow)

For those living close to estates and making regular use of the land, the personal experience of many has shown that public access is accepted or even welcomed.

“We’re very lucky round Dunkeld because there is two estates sort of have land round about there and both of them, well particularly one encourages dog walking, mountain biking, horse riding, they actively encourage it and the other one allows it. ..One is Atholl Estate, which since the last Duke died has gone very much into a kind of tourism and the other one is Murthly Estate, which I think is trying to run, well they’re trying to run it as a business, but the tourism side doesn’t seem to really have. I wouldn’t go along Murthly Drive whereas I would go up to Loch Ordie or anywhere like that which is Atholls”

(Perth)

B Perceptions and Understanding of Estates

Many respondents' "top-of-mind" associations with estates are focused on family / personal ownership, access and leisure opportunities and when asked to think about the role and activities of estates their comments are primarily related to leisure, tourism / hospitality and also farming. There is very little spontaneous comment on other commercial aspects of estate management.

"I think over years the family had it and then they are obviously living and keeping up this big house, but making money through tours and opening it up to the public and the likes of weddings and big functions and things like that. I know in Ayrshire, somebody that my dad knows, he owns it, he owns other companies but he's always lived there, that's just his big estate it is kind of different land, different variety of animals that live on it, but obviously that's not open to the public."

(Glasgow)

"The Glen Estate and things like that do weddings and all sorts of things now. Traquair House again have a lot of lands, but they are open to the public and they do all sorts of things down there a lot of sort of fairs and special events."

(Peebles)

In order to gauge the credibility and perceived importance of key messages relating to estates, their activities and their contribution, group participants were prompted with some headline messages drawn from an SAC report press release. These messages were as follows:

- Estates often create employment, sometimes in large numbers, for local people;
- Estates often provide affordable housing / housing at reasonable rents;
- Estates take environmental responsibility and manage the land they own;
- Some estates offer leisure opportunities such as fishing, golfing etc;
- Some estates offer business / industrial units for rent;
- Many estates support community / charitable projects;
- Many estates help / deliver tourism / visitor attractions e.g. historic buildings, country parks and gardens.

The idea that estates “create employment” was accepted by almost all group participants, although doubts were expressed about whether this would really be on a large scale. There was a tendency to assume that full-time employment would be available to small numbers of specialist workers and that any volume employment is likely to be seasonal or part-time, often linked to hospitality or tourism.

“It is a positive thing (employment). I mean we all stay in Glasgow, Clydebank, etc. so that is kind of Greater Glasgow, that is kind of urban obviously and the local communities, I mean the smaller communities, towns, etc. in Scotland, unless you've lived there, you might not know the ins and outs of the quality of life. So obviously it is positive, but I mean I would be interested to see how that is actually broken down... but how would that work, you can only have so many people being a chef.”

(Glasgow)

Like at this time of the year, they always need extra people, but then afterwards they're just back to their old family. They just need 2 or 3 people, so .. I mean traditionally I could believe it would have been local, but not really now.... A gamekeeper and a groundskeeper.

(Perth)

“I technically agree with the statement with the exception of the bit about large, I just don't think it's large numbers.”

(Peebles)

The provision of affordable housing or housing at reasonable rents was perhaps the least widely accepted of the messages tested in the focus groups. Whilst the idea of offering affordable housing is universally well received, personal experience and anecdotal evidence amongst respondents living close to estates suggested that housing was not perceived as affordable or easily accessible. In some instances there were also concerns about the quality of housing available and a lack of investment in maintaining or restoring traditional properties on estate land.

“They’re quite expensive the housing, the cottages. Very expensive for being out in the country and for what you get, some of them are not modern.”

(Perth)

The message that *estates take environmental responsibility and manage the land they own* provoked slightly mixed responses, based on personal experience and perceptions. Once again, the message itself is a positive one and a majority of respondents tended to believe it is generally true.

“I think certainly up here they have, coz I mean they certainly maintain it well. Paths are kept clear.”

(Dingwall)

A small number of respondents cited what they perceived as exceptions to the rule and, as indicated by the following quote, there are reservations that environmental initiatives are financially motivated. This does not necessarily devalue the initiative per se, and commercial realities are recognised.

“I mean Scotland used to be forested, and then the sheep farmers came up and that was that .. All the forest was taken away. And so the farm has been managed for sheep farming, and that’s continuously the way it is. And it’s only now that there’s sort of these pockets of places I’m aware of..... and they’re trying to put it in the original sort of forest/trees. There’s Pishwanton which is also trying to look at sustainability. And I heard .. I can’t remember the name... I think up in Leadburn they’re trying to do something too along the way. But there’s these little projects which are really looking at the sort of really environmental kinds of things, but I think the general big estates ..They’re also out to make money at the end of the day these projects they’re probably only interested in because there’s some kind of .. something in it for them – which is I suppose fair enough, you know, in business. But I think they have a very chequered past about how well they’ve managed the land or not managed the land”

(Peebles)

“It is missing out where you do have like bad estates that don’t repair the fence and don’t maintain the land. Let their deer get out on to the

road, and the sheep and whatever else. I know of an estate that has got various run-down houses that are beautiful old buildings and they're just left to ruin."

(Dingwall)

There is widespread conviction and acceptance that *many estates offer leisure opportunities such as fishing and golfing* and the only caveat to positive acceptance of this message relates to the cost and, in some instances, the "exclusivity" of the opportunities. Respondents do, however, recognise the benefits of these leisure opportunities in attracting tourists and visitors to the area, which in turn can benefit the local economy.

The message that *some estates offer business / industrial units for rent* is met with a positive albeit muted response. Most respondents assume that this would be likely and a number think the opportunities would be taken up by small, local craft-based businesses.

Well Traquair had the little craft businesses going on ..Those are quite reasonably priced actually. I know somebody who's got one.

(Peebles)

The idea that *many estates support community / charitable projects* generates a positive response and respondents living in close proximity to estates can often identify specific local projects or charities that are known to have benefited. The scale of any support is often unknown and awareness of specific support given is once again based on individual experience and involvement.

"Quite sort of I guess patriarchal quite a lot of these and, you know, they've always seen themselves as having that kind of benefactor kind of role I imagine."

(Peebles)

As we have already indicated, the importance of tourism related to estates is widely recognised and the idea that *many estates help / deliver tourism / visitor attractions e.g. historic buildings, country parks and gardens* is widely accepted and credible. More importantly, the spin-off benefits to other businesses in the area and to local, rural economies is recognised and valued. This appears to be one of the most

widely recognised and accepted roles associated with estates by respondents in all locations.

“They offer tourist facilities and tourism, leisure which is a good thing, probably one of the biggest industries in Perthshire, well parts of Scotland.”

(Perth)

Considering all of these messages or facts, respondents find it difficult or impossible to prioritise the importance of these contributions from estates; all are valued to some extent and appreciated in the purest sense. Indeed, there is a strong feeling that ALL of these collective benefits need to be communicated more effectively. Wherever possible, the messages should be supported with specific, quantifiable data.

C Reactions to Messages

In the final two pairs of focus groups, held in Clydebank and Perth, respondents were prompted with a variety of potential straplines relating to Scottish estates and landowners. The full list tested in Glasgow included the following:

- *Caring for the Scottish Countryside*
- *Custodians of Scotland's Countryside*
- *Conservation, Community, Countryside*
- *Supporting the Rural Scottish Economy*
- *Sharing Scotland's Rural Heritage*
- *Keeping People in the Scottish Countryside*
- *Building a Better Scottish Countryside*
- *Investing in the Scottish Countryside's Future*
- *Balancing the Needs of the Scottish Countryside*
- *Delivering environmental, economic and social benefits to rural Scotland*
- *Friends of Scotland's countryside*
- *Providing jobs and homes in rural Scotland*
- *Helping Scottish Rural Businesses*
- *Providing free access for all in the Scottish Countryside*
- *Welcoming People to Scotland's Countryside*
- *Promoting Tourism in Rural Scotland*
- *Champions of a Greener Rural Scotland*
- *Conserving Scotland's Rural Landscape*
- *Scottish Hills, Glens, Castles and Culture*
- *Your friends in Scotland's Countryside*

Those straplines which were felt to be overly “wordy” or “pretentious” tended to provoke a negative reaction. However, words and phrases which tended to attract a positive reaction were those exuding warmth or friendliness; e.g. *welcoming, caring, access for all*, and words which acknowledged Scotland and history; e.g. *Scotland, heritage, countryside*

It is also important to note that words and phrases which tended to attract negative comment / indifference in Glasgow were those with little or no salience to the urban dweller; e.g. *rural economy* – the word *rural* itself tended to be met with much indifference.

“It’s an “us and them” - rural people, it shouldn’t really be about that, it should be everybody’s Scotland.”

(Glasgow)

On a general level, the key theme which worked most positively for respondents was that which inferred that “*Scotland belongs to the Scottish people*”. Given these overall feelings, the straplines attracting the most positive reactions in Glasgow were:

- *Sharing Scotland’s (Rural) Heritage*
- *Providing free access for all in the Scottish Countryside*
- *Caring for the Scottish Countryside*

The straplines attracting the least positive reactions overall were:

- *Supporting the Rural Scottish Economy*
- *Scottish Hills, Glens, Castles and Culture*
- *Providing jobs and homes in rural Scotland*
- *Delivering environmental, economic and social benefits to rural Scotland*

Whilst the term *Custodians of Scotland’s Countryside* was a very positive message, there was a strong aversion to the term “custodian” as this had connotations of pretentiousness and ‘aloofness’. A few further spontaneous ideas were also tested (i.e. presented verbally and not textually); the line ***Maintaining Your Scotland*** seemed to strike a very positive note with all respondents; ***Looking After Your Scotland*** also seemed to work effectively.

A modified list was tested in Perth, as follows:

- *Caring for the Scottish Countryside*
- *Stewards of Scotland’s Countryside*
- *You’re Welcome, Feel Free*
- *Scottish Hills, Glens, Castles and Culture*
- *Sharing Scotland’s Rural Heritage*
- *Your Friends in Scotland’s Countryside*
- *Encouraging access for all in the Scottish Countryside*
- *Promoting Tourism in Rural Scotland*

- *Enjoy Scotland's Countryside*
- *Welcoming People to Scotland's Countryside*

From this list, the most positively received amongst both groups in Perth were:

- *Enjoy Scotland's countryside*
- *Welcoming people to Scotland's countryside*

"Caring for the Scottish countryside" was also popular amongst those recruited to the "positive" group. As indicated in the following comments, they placed emphasis on caring for both land owners and anyone using the land.

"Welcoming, caring, sharing - so caring and sharing and enjoy and welcoming.....There is two different themes there isn't there, like the welcome bit and then the caring and looking after. What do they want, what is the most important?caring so they won't destroy their land..... think you need to do both. You've got to be sure those you're welcoming understand they have a duty to look after it."

(Perth)

D Communication

Group participants were asked to consider the ways in which the types of information and messages discussed during the groups would be best conveyed to the public at large. For those living in rural communities close to estates, the importance of personal contact and local profile building for estates and land owners cannot be stressed too strongly.

“At the end of the day, you have to have relationships with people to understand them and trust them, and I think if landowners worked harder at building relationships through community involvement then they'd get a lot better feedback.”

(Peebles)

In all groups there were examples cited of estates that promote tourism, leisure and more generally access, through signposting and through formal promotion via, for example, Tourist Information Centres. These tangible signs of welcome are widely appreciated.

“Well Atholl estate you can go up to Dunkeld, what's the car park? Tally car park and I mean there is a notice board showing the walks. They put out leaflets about the walks, they've got a sign saying, I think, Atholl Estates welcomes horse riders. I mean horses are quite a difficult thing to find places to go because they do make a mess, which I quite appreciate.”

(Perth)

“There's good examples. I'm trying to think. We were all down near Aviemore and there's a big estate there. And, again, they've got really good leaflets. There's waymark walks and things, cycle tracks they encourage people to use. It's campsites and that ... and again it just gives you an impression, 'Oh, they're obviously forward looking. They're encouraging people to use the land and take pleasure and enjoyment out of it'. Sure it generates a bit of money, which I'm sure is useful, but that ploughs back and allows that to be continued. And I think everyone's happy with that. So it almost becomes a bit of a sort of a brand – a kind of 'environmental tourism' kind of brand – with good access, and about kind of developing almost a relationship

between the sort of the landowners and the people that are using the land.”

(Peebles)

Some City based respondents commented on the positive nature of this research in conveying an impression that land owners are trying to encourage access for the public at large.

“I have actually been made aware that people are willing to try and make an attempt to open doors, which I never knew before, so this is an eye opening for me. have this kind of session and talk to your local public, so I think it is more positive.

(Glasgow)

In almost all groups there was spontaneous comment on the importance of links with education, not only in conveying a positive impression of land owners and estates but for education's sake per se. A good deal of emphasis was placed on young children, of primary school age, although potential benefits for urban dwellers of all ages were highlighted.

“I think with the teens, you could bus them out and what not, and you could give them a tour of the estate and tell them about the history - but then it all depends about how you're putting that across. You know, they could be really bored and absolutely hate it, and think 'I'm never going back to the country. What a waste of time that was'. You'd really have to put a lot of thought in about getting the message across at their level as something that they're going to take in and something that they would find interesting and exciting, and hopefully get hooked on outdoors and learn to appreciate that a bit”.

(Peebles)

“I think if they educate taking school parties there maybe, start them quite young to appreciate it.”

(Perth)

Whilst preference for specific messages is to some extent subjective, the findings suggest that it is important to be proactive in all communications, rather than reactive. It should also be borne in mind that sweeping, generalised statements can

provoke negative comparisons with individual estates based on personal experience. Tailored, localised messages are likely to be better received and more credible.

2. Quantitative Findings

This section outlines the key findings from the survey administered with 1,135 adults in Scotland. A copy of the questionnaire used for this survey is appended to this report.

A Attitudes towards Scotland's Countryside

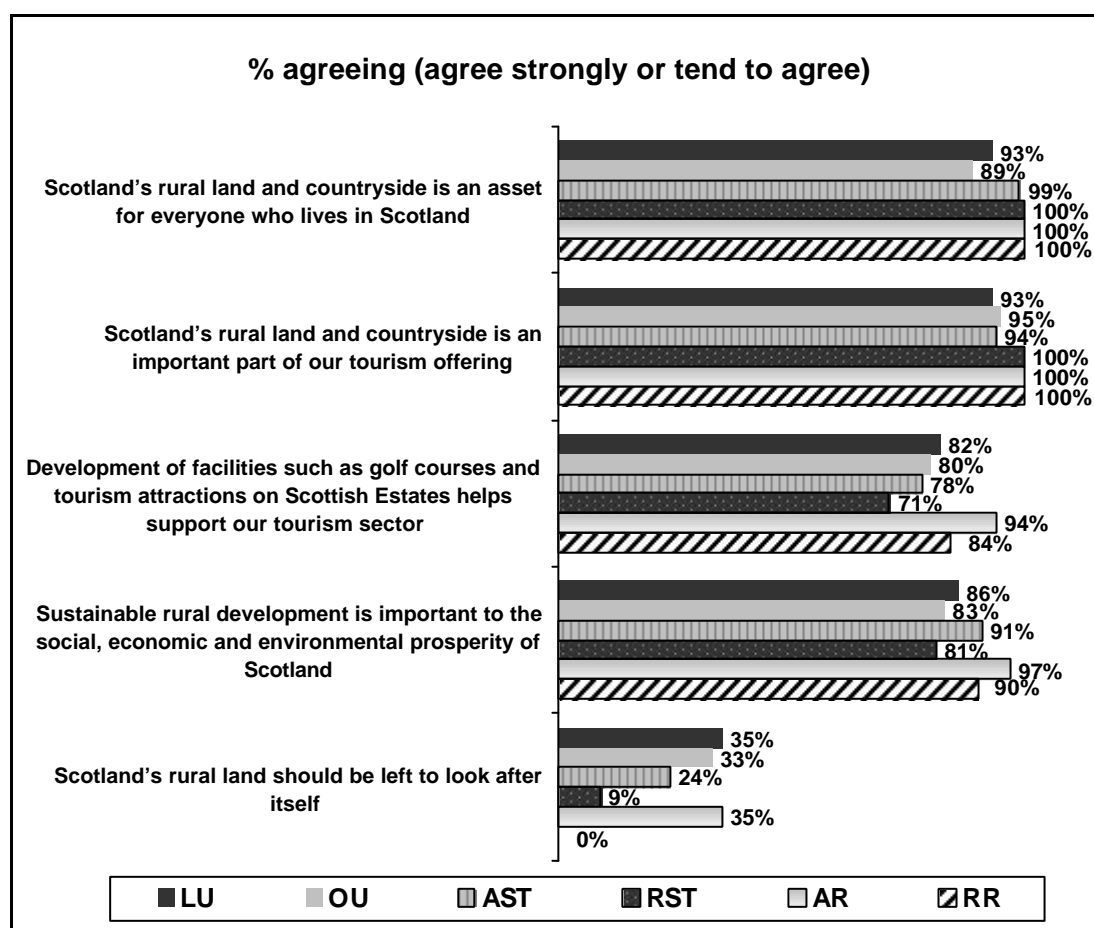
Respondents were prompted with a number of statements relating to Scotland's countryside and asked to say how much they agreed or disagreed with each; that is "agree strongly", "tend to agree", "neither agree nor disagree", "tend to disagree" or "disagree strongly". A mean score was calculated based on the distribution of responses, where 5 equals "agree strongly" and 1 equals "disagree strongly" and the mean score is shown as a summary statistic in the table below.

	Agr Str	Tend Agr	Nei Nor	Tend Disag	Dis Str	Don't Know	Mean Score
<i>Scotland's rural land and countryside is an important part of our tourism offering</i>	53%	41%	3%	1%	0%	1%	4.5
<i>Scotland's rural land and countryside is an asset for everyone who lives in Scotland</i>	49%	44%	5%	1%	*%	1%	4.4
<i>Sustainable rural development is important to the social, economic and environmental prosperity of Scotland</i>	40%	46%	10%	1%	*%	3%	4.3
<i>Development of facilities such as golf courses and tourism attractions on Scottish Estates helps support our tourism sector</i>	35%	47%	12%	2%	1%	3%	4.2
<i>Scotland's rural land should be left to look after itself</i>	10%	21%	17%	28%	17%	7%	2.8

There is widespread agreement that "Scotland's rural land and countryside is an important part of our tourism offering" and that "development of facilities such as golf courses and tourism attractions on Scottish Estates helps support our tourism sector" (94% and 82% respectively). Focusing on residents, 93% of respondents agree that "the rural land and countryside is an asset for everyone who lives in Scotland" and 86% agree that "sustainable rural development is important to the social, economic

and environmental prosperity of Scotland”. Views are mixed regarding active management of natural assets with 31% agreeing that “Scotland’s rural land should be left to look after itself”, 45% disagreeing with this statement and 17% neither agreeing nor disagreeing.

It is interesting to note some differences in the weight of opinions according to the urban rural classification of the area in which respondents live. As the following chart shows, respondents living in remote small towns (RST), accessible rural areas (AR) and remote rural areas (RR) are unanimous in agreeing that Scotland’s rural land is an asset for everyone and that it is an important part of our tourism offering. None of the survey participants living in remote rural areas (RR) agree that Scotland’s rural land should be left to look after itself.



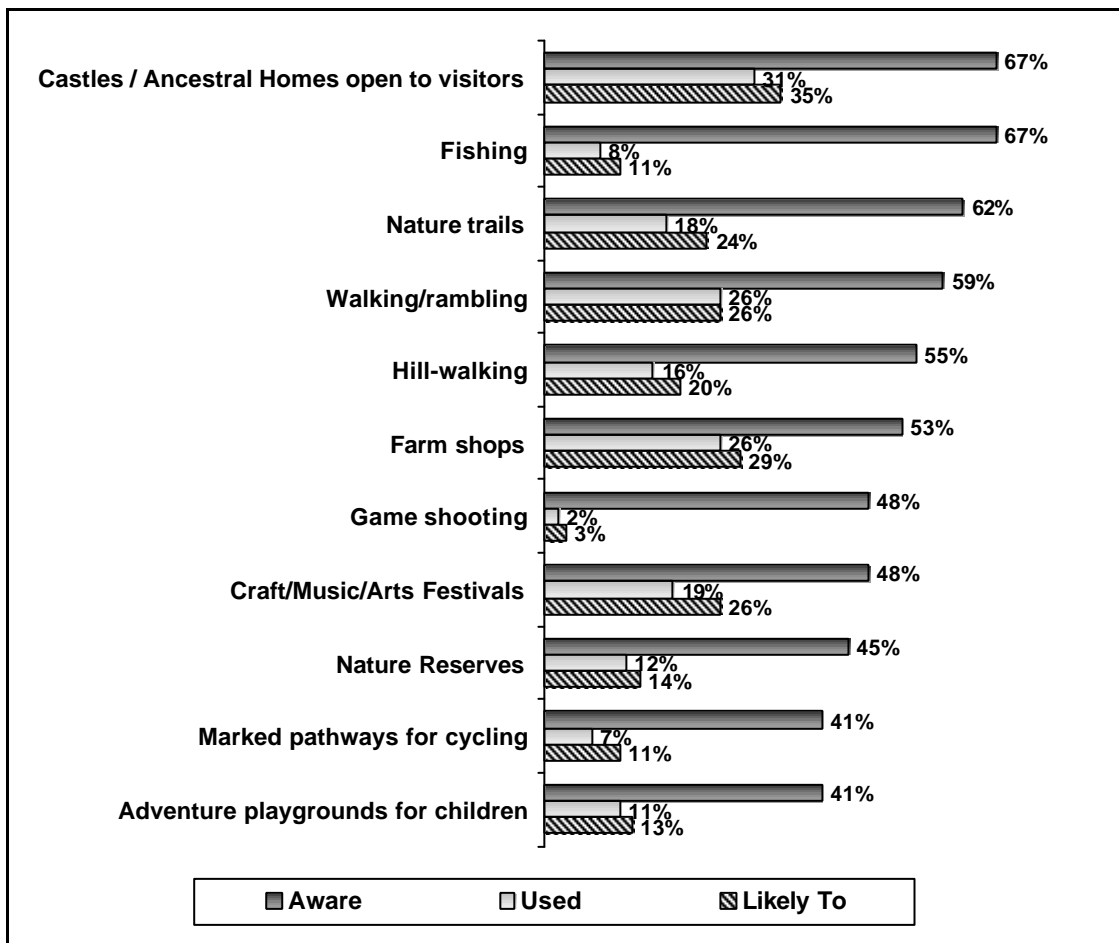
The youngest age group within our survey sample (16-24 years) shows the lowest overall level of agreement that “Scotland’s rural land or countryside is an asset for everyone who lives in Scotland” (a mean score of 4.25 compared with 4.42 for the

sample as a whole). They are also less likely to view Scotland's rural land and countryside as an important part of our tourism offering (a mean score of 4.33 compared with 4.49 for the sample as a whole).

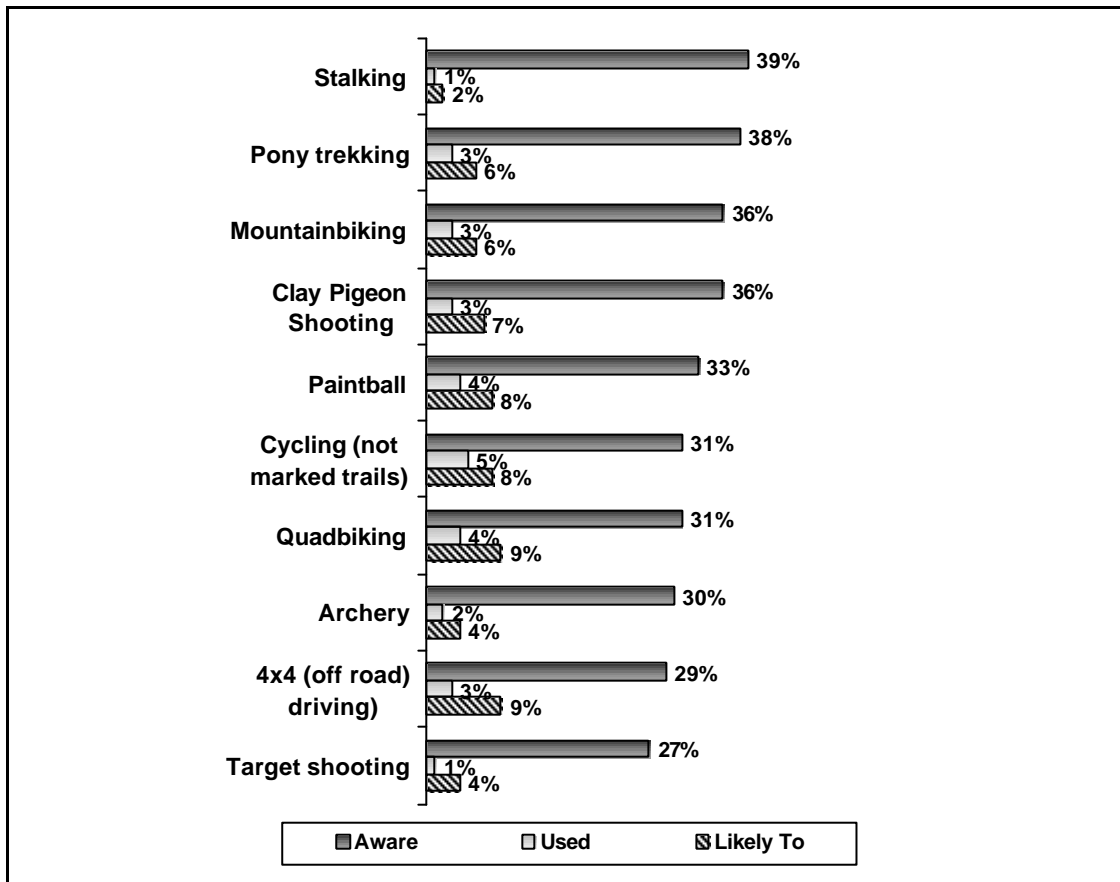
B Awareness and Use of Facilities Offered by Estates

Respondents were prompted with a list of facilities and attractions and asked to say which they were aware of as being offered by any estates in Scotland. They were then asked to say which, if any, they had used or visited on any Scottish estates **in the last year or so** and which, if any, they would like to use or visit in the future.

As the following chart shows, the best known facilities and attractions offered by any estates in Scotland are castles/ancestral homes, followed by more typical “rural” activities such as fishing, nature trails, walking and hill-walking. More than one in two respondents is aware of each of these being offered by any estates in Scotland. In terms of visits or use, castles / ancestral homes are the most popular (35% claim to have visited in the last year) followed by farm shops and walking /rambling (cited by 26% each). Encouragingly, there appears to be potential to increase use/visits, with higher proportions indicating they would like to use in the future.



Whilst the following facilities were less widely known or used, again there is potential for growth in use, with larger proportions who would “like to use or visit” than have done so in the last year or so.



C Awareness and Understanding of the Role of Estates

Respondents were asked to say roughly what proportion of Scotland's land mass they think is privately owned by Estates or private land owners. They were also asked to say how much they know about the role or activities of Scotland's estates and land owners.

As the following chart shows, estimates of the proportion of land that is privately owned vary widely, with 13% of respondents suggesting 30% or less, 20% giving estimates between 31% and 50%, 46% suggesting over 50% and 21% unable to estimate.

% of Scotland's land mass privately owned by Estates or private land owners	%
Less than 5%	*
5% - 10%	1
11% - 20%	5
21% - 30%	7
31% - 40%	12
41% - 50%	8
51% - 60%	10
61% - 70%	16
71% - 80%	13
81% - 90%	5
More than 90%	2
Don't know	21

When prompted to say how much they knew about the role or activities of Scotland's estates and landowners, only 1% said they knew "a great deal", 7% "a reasonable amount" and 18% "a little". Almost two in three respondents (65%) said they knew "very little/virtually nothing" or "nothing at all".

Knowledge of role or activities of Scotland's estates and landowners	%
A great deal	1
A reasonable amount	8
A little	18
Very little / virtually nothing	33
Nothing at all	32
Don't know / unable to answer	9

APPENDIX

Scotland's Land and Estates

Topic Guide

The following question areas have been developed to provide a framework for discussion. All relevant topic areas should be discussed at some stage during the group session, but should be addressed in such a way that facilitates a relaxed and natural flow of conversation.

Introduction / Warm-Up (10 - 15 minutes)

- Introductions and recap on the aims of the discussion i.e. *we are conducting research to better understand people's attitudes towards Scotland's assets in terms of the land, sites of cultural, historic and leisure interest and issues around their use;*
- How would you describe the role that rural land has in your life, for example through your work, through hobbies, through holidays etc;
- How much thought do you give to how land in Scotland is owned and managed and by whom; how much does this matter and why;
- What, if anything, do you know about land ownership and management in Scotland and where does this information come from;

Estates - spontaneous views (40-50 minutes)

- What comes to mind when I mention "estates" or "rural estates";
- What estates, if any, are you aware of either in the immediate area or elsewhere in Scotland;
- What do you think are the activities undertaken on / by estates; are they all the same or different and in what ways;
- What do you think estates contribute to local communities and why; Probe for: social, economic and environmental benefits;
- What, if anything, do you think of as negatives impact of estates and why – how did you form this opinion;
If not covered already:

- What do you feel are the environmental impacts of estates; to what extent do you feel estates could play a role in mitigating climate change; is this something you consider when you think of “estates”
- Who do you think of as owning estates (a corporate entity / an individual / everyone / don’t think of anyone or anything) – why;
- Tell me the picture that comes to mind when someone says “landowner” or “country landowner” – probe fully for age, personality, characteristics and reasons for this being the image that comes to mind;

Estates – prompts (20-25 minutes)

- PROMPT EACH OF THE FOLLOWING AND PROBE: Is this something you had considered before now; is it surprising; is it credible and why/why not;
 - ★ Estates often create employment, sometimes in large numbers, for local people;
 - ★ Estates often provide affordable housing / housing at reasonable rents;
 - ★ Estates take environmental responsibility and manage the land they own;
 - ★ Some estates offer leisure opportunities such as fishing, golfing etc;
 - ★ Some estates offer business / industrial units for rent;
 - ★ Many estates support community / charitable projects;
 - ★ Many estates help / deliver tourism / visitor attractions e.g. historic buildings, country parks and gardens;
- Which of these, if any, are significant positive features and why;
- Which if any have negative connotations and in what ways and why;
- How should Scotland’s estates be communicating these messages to people in Scotland (probe: editorial in local papers, editorial in national papers, local poster advertising, national advertising (what media), a public facing website;
- What are the most important messages to convey and why;

Summing Up (5-10 minutes)

- How, if at all, have your opinions changed during this discussion and why?

QUANTITATIVE SURVEY QUESTIONNAIRE

- 1 I am now going to read out a short list of statements about Scotland's countryside and I'd like you to tell me, using one of the phrases on this card, how strongly you agree or disagree with each? **SHOWCARD A**

	Agree strongly	Tend to agree	Neither agree/disagree	Tend to disagree	Disagree strongly	Don't know / no opinion
<i>Scotland's rural land and countryside is an asset for everyone who lives in Scotland</i>	1	2	3	4	5	6
<i>Scotland's rural land and countryside is an important part of our tourism offering</i>	1	2	3	4	5	6
<i>Development of facilities such as golf courses and tourism attractions on Scottish Estates helps support our tourism sector</i>	1	2	3	4	5	6
<i>Sustainable rural development is important to the social, economic and environmental prosperity of Scotland</i>	1	2	3	4	5	6
<i>Scotland's rural land should be left to look after itself</i>	1	2	3	4	5	6

- 2a Which of these are you aware of as facilities offered by any estates in Scotland?
SHOW CARD B

- 2b And which, if any, have you personally used or visited on any Scottish estates in the last year or so?

- 2c And which of these, if any, would you like you like to use or visit in the future?

	2a	2b	2c
Nature trails	1	1	1
Walking /rambling (not a trail)	2	2	2
Hill-walking	3	3	3
Marked pathways for cycling	4	4	4
Cycling (not marked trails)	5	5	5
Quadbiking	6	6	6
Mountainbiking	7	7	7
Pony trekking / Trekking on horseback	8	8	8
4 x 4 (off road) driving	9	9	9
Clay Pigeon shooting	10	10	10
Target Shooting	11	11	11
Game shooting	12	12	12
Stalking	13	13	13
Fishing	14	14	14
Nature reserves	15	15	15
Paintball	16	16	16
Archery	17	17	17
Castles or ancestral homes open to visitors	18	18	18
Adventure playgrounds for children	19	19	19
Craft / Music / Arts Festivals	20	20	20
Farm Shops	21	21	21
None of these	22	22	22

- 3 Roughly what proportion of Scotland's land mass do you think is privately owned by Estates or private land owners? If you don't know then just give your best estimate?
SHOW CARD C

Less than 5%	1
5% - 10%	2
11% - 20%	3
21% - 30%	4
31% - 40%	5
41% - 50%	6
51% - 60%	7
61% - 70%	8
71% - 80%	9
81% - 90%	10
More than 90%	11
Don't know	12

- 4 How much would you say you know about the role or activities of Scotland's estates and land owners? SHOW CARD D

A great deal	1
A reasonable amount	2
A little	3
Very little / virtually nothing	4
Nothing at all	5
Don't know / unable to answer	6