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Survey of the Economic Conditions of Crofting 2015 -2018

AGRICULTURE, ENVIRONMENT AND MARINE

social research

Survey of the Economic Conditions of Crofting 2015 – 2018

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December 2018

Contents

Key Findings

- Building on previous publications, in 2010 and 2014, this report provides a detailed outline of the uses and financial situation of crofts in the years between 2015 and 2018.

- Broadly comparable with the last survey in 2014, this year's survey covered a wide range of social and economic issues such as the demographic composition of crofting households; the activities on crofts; the employment status of crofters; the investments made in, and the income from crofts; and the outlook of crofting households. It also touched on crofters' views of support and information sources available to the crofting community and the future of crofting more broadly.

- 4,000 crofters were invited to participate in a self-completion postal survey using the Crofting Commission's Register of Crofts (ROC) as the sampling frame. Fieldwork took place between 10th July and 17th September 2018. A total of 739 surveys were returned, a response rate of 18%. Results were weighted to reflect the profile of the crofting population by local authority and tenure.

Profile of Crofters

- In line with 2014, the majority of registered crofters were male (74%), higher than the Scottish population as a whole[1]. Only a quarter were female. However, the proportion of female registered crofters has doubled from 13% to 26% in the last four years

- The age profile of crofters is older than the wider population – just under half (45%) are aged 65 and over, while only 3% are aged under 35. For comparison, just under a fifth (19%) of people in Scotland as a whole[2] are aged 65 and over.

- Crofters tend to live in 1-2 person households (69%), be born in Scotland (85%) and to have been crofting for 20 years or more (65%).

Crofting Activities

- Crofting activities are most likely to comprise of livestock and/or crops - a similar picture to 2014. However, a number of activities have seen increases since 2014, suggesting increased diversification:
    - Bed and breakfast/holiday lets have increased from 8% in 2014 to 15% in 2018

[1] As noted in the methods section, the report covers 'registered' crofters. It may be that in crofts that are jointly owned or owned by a couple, men are more likely to be registered. https://www2.gov.scot/Topics/People/Equality/Equalities/DataGrid/Gender

[2] https://www.gov.scot/Topics/People/Equality/Equalities/DataGrid/Age/AgePopMig

    - Leisure activities have increased from 3% to 7%
    - Wood processing has increased from 2% to 5%.

- The proportion of those working on the croft and undertaking no other employment has decreased from 28% in 2014 to 23% in 2018.

- There has been an increase in the proportion of households that have no-one working on the croft or other earning activities from 10% in 2014 to 18% in 2018.

Financial Issues in Crofting

- There is a mixed economic picture when it comes to income from crofting activities. The median has remained the same between 2014 and 2018 - £2,000. However, there has been an increase in the mean income. This is because a small number of crofters reported very high incomes, and is not necessarily reflective of crofters as a whole.

- Income derived from crofting activities has become more polarised than in the past. As noted above there were a number of crofters with very high incomes in the sample. However, there was also an increase in the proportion who say they get no income from crofting (from 18% in 2014 to 25% in 2018).

- Income from non-crofting activities has increased. The median household income reported was £25,000, up from £21,000 in 2014. Just under a third (32%) of crofters reported an income of £10,001-£25,000, with the same proportion (32%) reporting an income of £25,001-£50,000.

- The median running costs of a croft, excluding land and housing costs, were estimated at £2,000 – a small increase from 2014 (median of £1500).

- The majority of crofters (73%) reported no running costs related to their crofting-based activities or running costs of under £5,000. The three most common responses were up to £1,000, £1,001-£5,000 and Nothing at 30%, 30% and 13%, respectively.

- Compared to 2014, there has been an increase both in the proportion of crofters that pay rental/mortgage costs for their housing and in the average costs. While the proportion of those paying nothing has decreased from 52% to 32%, the mean cost has risen from £1,500 per annum to £3,549.

- The average *land* rental and mortgage costs were much lower, with a median annual cost of just £64 and a mean cost of £741, though these have also risen considerably since 2014, from £25 and £270 respectively.

Investments in the Croft

- Just over two thirds of crofters (68%) had invested in their croft the last three years – a considerable increase from 58% in the 2011-2014 period. This was also higher than the proportion of crofters who said that they planned to invest in their croft in the 2015-2018 period in the previous survey (55%).

- Just under half (48%) of crofters said that they planned to invest in their croft in the next three years, down from 55% in 2014. The median planned investment was £2,000, while the mean figure was much higher at £16,450, and up from £9,100 in 2014.

- The three most common reasons for not investing were uncertainty of the potential benefit of investing (35%), that the financial cost/outlay of investing was too great (33%) and that there was no perceived desirable opportunity to do so (22%).

Sources of Information on Crofting

- Just over a third of crofters had looked for advice or support on crofting activities in the last 12 months.

- Less than a third of crofters had actively looked for any guidance or advice on crofting in the last year although only 5% felt that they would not know where to go to get information. The Crofting Commission and Crofting Counties Agricultural Grants were the most popularly quoted sources of information that crofters would use.

- Postal communications are significantly the most preferred method for receiving information on crofting (74%), although 38% also supported the use of email for this purpose.

The Future of Crofting

- The clear majority of crofters thought that crofting is not economically viable without supplementing their income in some way and this has increased from 88% in 2014 to 95% in 2018. There has also been an increase in the proportion who see diversification as the way to secure the economic future of crofting from 54% in 2014 to 62% in 2018.

- When asked to comment on the future of crofting and issues surrounding the industry, crofters identified three key themes:

    - a lack of support/funding available to crofters

    - a lack of support from Government

    - a lack of representation from crofting authorities.

1. Introduction and methodology

1.1 Every four years, the Scottish Government is required to submit a report to the Scottish Parliament on the economic condition of crofting, in line with Section 51 of the Crofting Reform (Scotland) Act 2010. To inform the 2018 reporting, Ipsos MORI, an independent research organisation, was commissioned to conduct research on a range of issues affecting crofting businesses and households.

1.2 Building on previous publications, in 2010 and 2014, this report provides a detailed outline of the uses and financial situation of crofts in the years between 2015 and 2018. Broadly comparable with the last survey in 2014, this year's survey covered a wide range of social and economic issues such as the demographic composition of crofting households; the activities on crofts; the employment status of crofters; the investments made in, and the income from crofts; and the outlook of crofting households. It also touched on crofters' views of support and information sources available to the crofting community and the future of crofting more broadly.

1.3 The report provides up-to-date and accurate information on the status of crofters to inform decision making and legislation affecting the crofting community, including the new Crofting Bill planned for this parliamentary session.

Introduction

1.4 Crofting is a system of land holding which is unique to Scotland. A croft is a relatively small agricultural land holding which is most commonly held in tenancy and which may or may not have buildings or a house associated with it. While the average croft size is around 5 hectares (ha), crofts range in size from less than half hectare to more than 50ha. There are approximately 20,570 crofts in Scotland, mainly in the crofting counties of the Highlands and Islands, and around 33,000 people live in crofting households.

1.5 Crofters have a number of duties under the current legislation: to reside within 32 km of their croft; to cultivate the croft, or put the croft to another purposeful use; and not misuse or neglect the croft.

1.6 Crofting was designed to supplement other forms of employment rather than to be the sole source of income. In addition to agricultural activities, crofts are also used for a wide variety of other activities such as growing fruit and vegetables; growing trees; bed and breakfasts and holiday lets; and renewable energy production.

1.7 The most recent legislative reform was the 2010 Crofting Reform (Scotland) Act which resulted in the reform of the Crofters Commission, with changes designed to make it more accountable, and its renaming as the Crofting Commission.

1.8 Last Autumn, the Scottish Government launched a public consultation on Crofting Legislation and Future Priorities for Crofting, seeking views on the legislative change that may be required and priorities for crofting in the future. In total, 122 responses were submitted, seventy-four per cent of which were from individual members of the public.

Methods

1.9 Replicating the 2014 survey, this survey was a self-completion postal survey. This was considered to be more reliable than an online survey for the purposes of this research, due to the below average internet connection speeds in the crofting counties, and the relatively low internet use rates among the 60-74 and 75+ age groups in Scotland, which are disproportionately represented among the crofting population.

1.10 Surveys were sent to 4,000 crofts in Scotland in total, in two mail-outs[3] of 2,000, using the Crofting Commission's Register of Crofts (ROC) as the sampling frame. In line with the sampling approach for the last wave of the survey, the sample was stratified by local authority[4] before crofts were randomly selected to take part, to help ensure that the composition of respondents reflected the geographical spread of registered crofters. We also stratified the sample by tenure to ensure the balance of owner-occupier and tenanted crofts was reflected in the sample.

1.11 Respondents were sent a letter outlining the background and purpose of the survey, including FAQs, along with a paper questionnaire, and freepost return envelope. A postcard reminder was sent out approximately three weeks after the first mail-out.

1.12 Fieldwork took place between 10th July and 17th September 2018. A total of 739 surveys were returned, a response rate of 18%. Results were weighted to reflect the profile of the crofting population by local authority and tenure.

1.13 Where percentages do not add up to exactly 100%, this can be explained by the rounding of results to the nearest 1%.

1.14 Respondents in the survey are representative of registered crofters (i.e. those who are included in the Crofting Commission's Register of Crofts). As only one person in the household can be included in the Register, this may not cover all crofters in the household. However, respondents are referred to as crofters throughout the report for the sake of brevity.

[3] After the first mailout, an error was identified in the initial sample data provided, meaning that some questionnaires did not arrive at their intended destination. While the issue was rectified immediately, and apology letters sent out to those affected, this problem potentially had an impact on response rates. Therefore, to mitigate this a second wave of sample was drawn to ensure that sufficient numbers of questionnaires were returned.

[4] The local authorities covered were Argyll and Bute, Eilean Siar, Highland, the Orkney Islands and the Shetland Islands

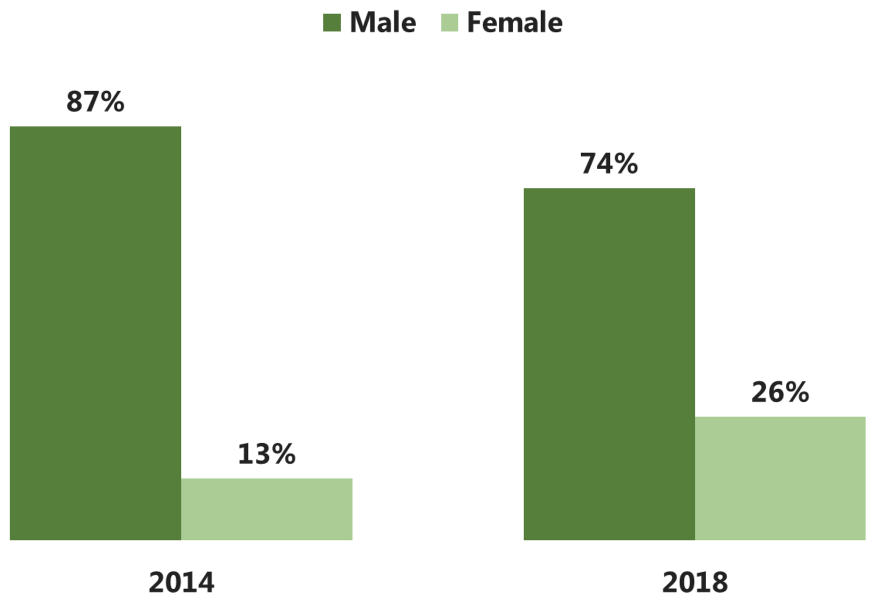
2. Profile of crofters

Demographics

2.1 Overall, the profile of crofters is different than the general population, both across Scotland as a whole and within the crofting local authorities – this in line with the findings from the 2014 wave of the survey. Most notably, they tended to be older and were overwhelmingly male.

2.2 In line with 2014, the majority of crofters were male (74%), higher than the Scottish population as a whole[5]. Only a quarter were female. However, the proportion of female crofters has doubled from 13% to 26% in the last four years (Figure 2.1).

Figure 2.1 Gender differences over time: 2014 (751); 2018 (719)



2.3 The age profile of crofters is older than the wider population – just under half (45%) are aged 65 and over, while only 3% are aged under 35 (Figure 3.2). For comparison, just under a fifth (19%) of people in Scotland as a whole[6] are aged 65 and over. Even when this is broken down further to look at the specific areas in question, crofters are older than the general population. For example, 25% of the population in Na h-Eileanan Siar are aged 65 or over, the comparable proportion for those in the survey was 45% (Table 2.1).

2.4 There was no statistically significant change in the age profile of crofters between 2014 and 2018.

[5] As noted in the methods section, the report covers 'registered' crofters. It may be that in crofts that are jointly owned or owned by a couple, men are more likely to be registered. https://www2.gov.scot/Topics/People/Equality/Equalities/DataGrid/Gender

[6] https://www.gov.scot/Topics/People/Equality/Equalities/DataGrid/Age/AgePopMig

Figure 2.2 Age profile (719)

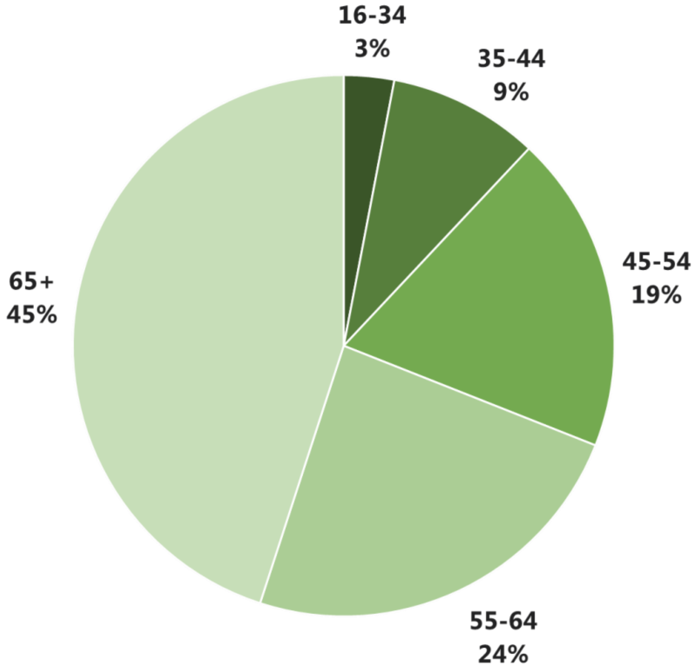


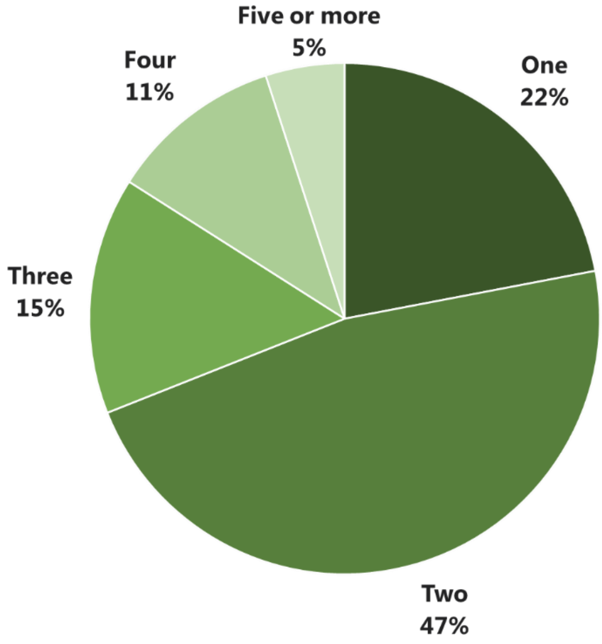
Table 2.1 Percentage aged 65 and over by local authority

	Survey results	Population estimates[7]
Argyll and Bute *(Base: 25)*	40%	25%
Highland *(300)*	45%	22%
Na h-Eileanan Siar *(299)*	45%	25%
Orkney Islands *(14)*	43%	23%
Shetland Islands *(72)*	46%	19%

2.5 It was most common for crofters to live in a two person household (47%), although a substantial proportion lived alone (22%). Five per cent lived in a household of five or more (Figure 2.3). There were no statistically significant differences in household composition from the previous wave of the survey.

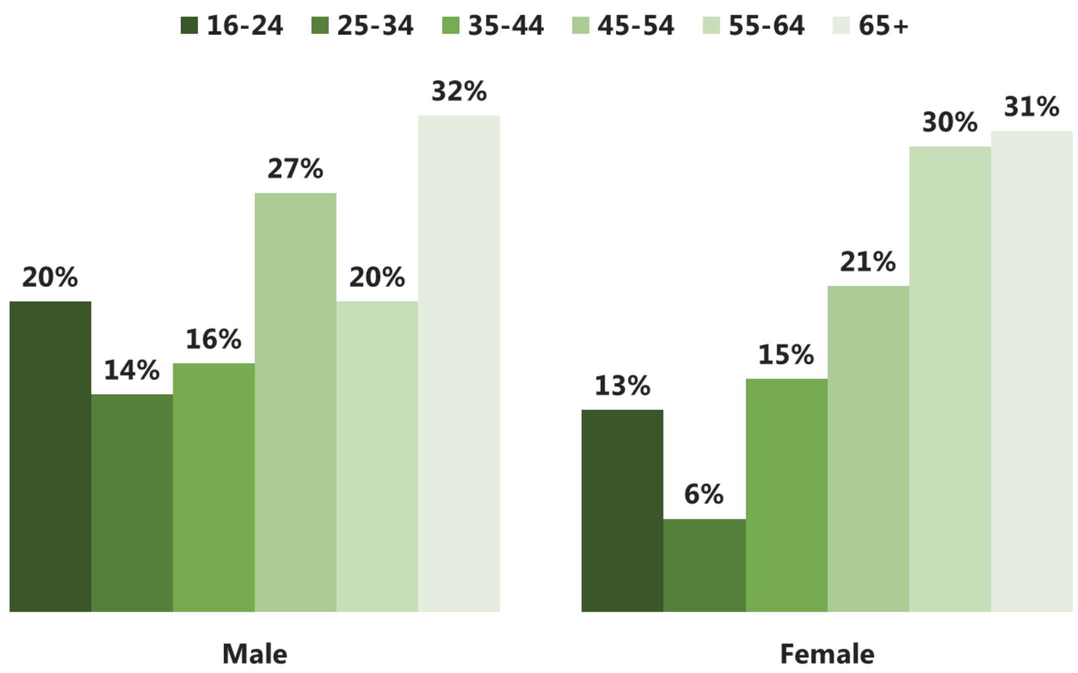
[7] https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-estimates/mid-year-population-estimates

Figure 2.3 Number of occupants (715)



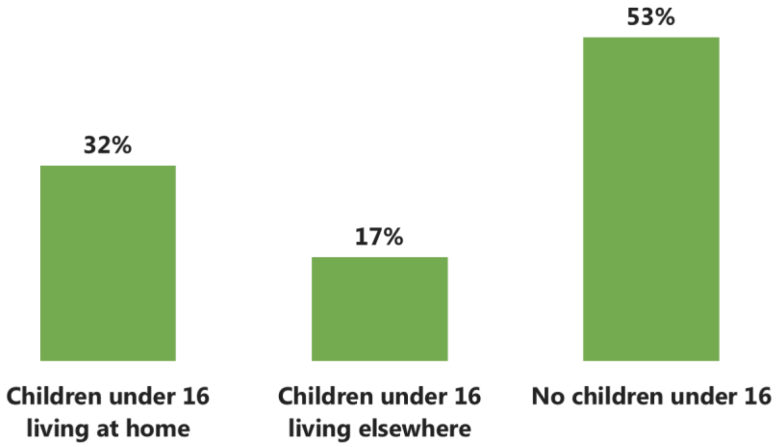
2.6 Figure 2.4 below shows the breakdown of age and gender of the additional adults in the household. There are some differences between the age breakdown between male and female additional adults in the household: while a third of the additional males living in crofter households are aged 34 and under (34%), only a fifth of the additional females were in the same age band (19%).

Figure 2.4 Gender and age of other occupants 16 and over (582)



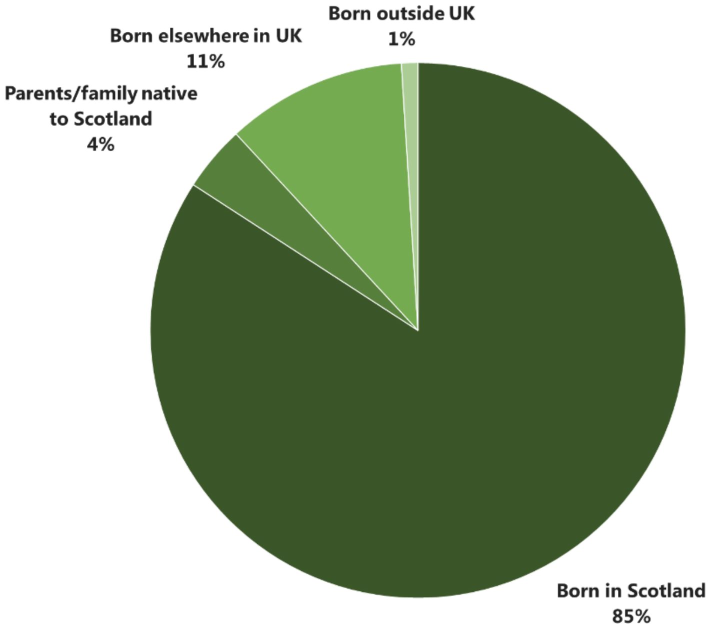
2.7 Over half (53%) of crofters who live with one or more other householders did not have any children under the age of 16 living at home or elsewhere (Figure 2.5).

Figure 2.5 Children under 16 in household (582)



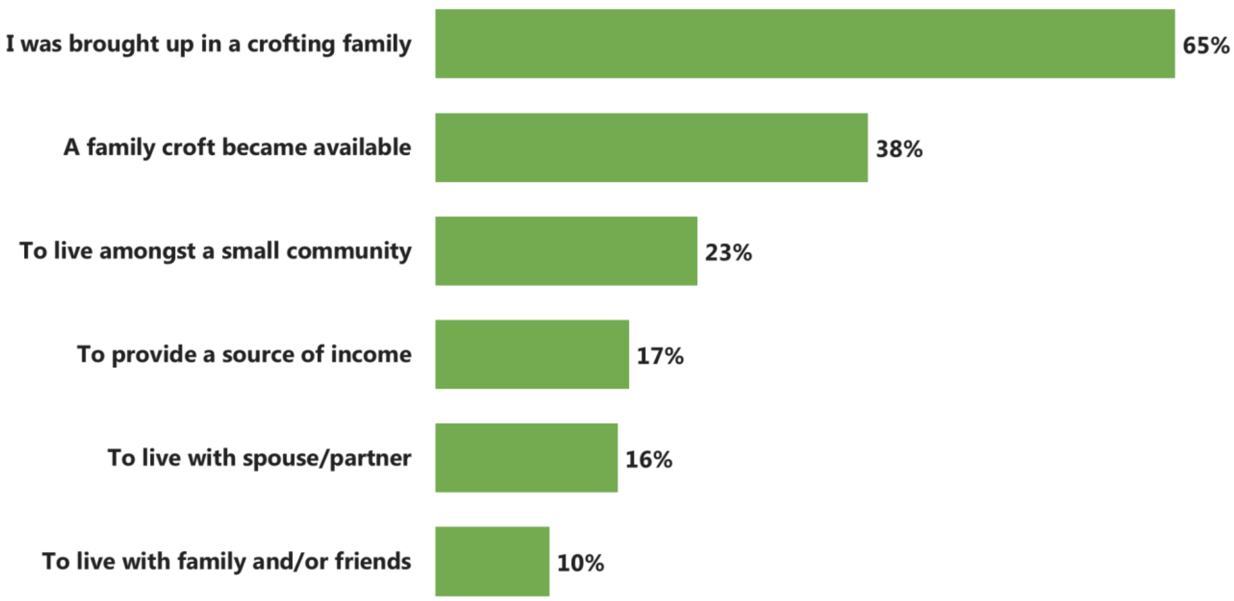
2.8 The majority of crofters were born in Scotland (83%), and a further 11% were born elsewhere in the UK. Only 1% were born outside of the UK (Figure 2.6). This has remained unchanged since 2014.

Figure 2.6 Birth place (722)



2.9 It was most common for crofters to say that they became one due to growing up in a crofter family (65%). The next most common reasons were that a family croft became available (38%) or that they wanted to live amongst a small community (23%) (Figure 2.7).

Figure 2.7 Reason for becoming a crofter (718)



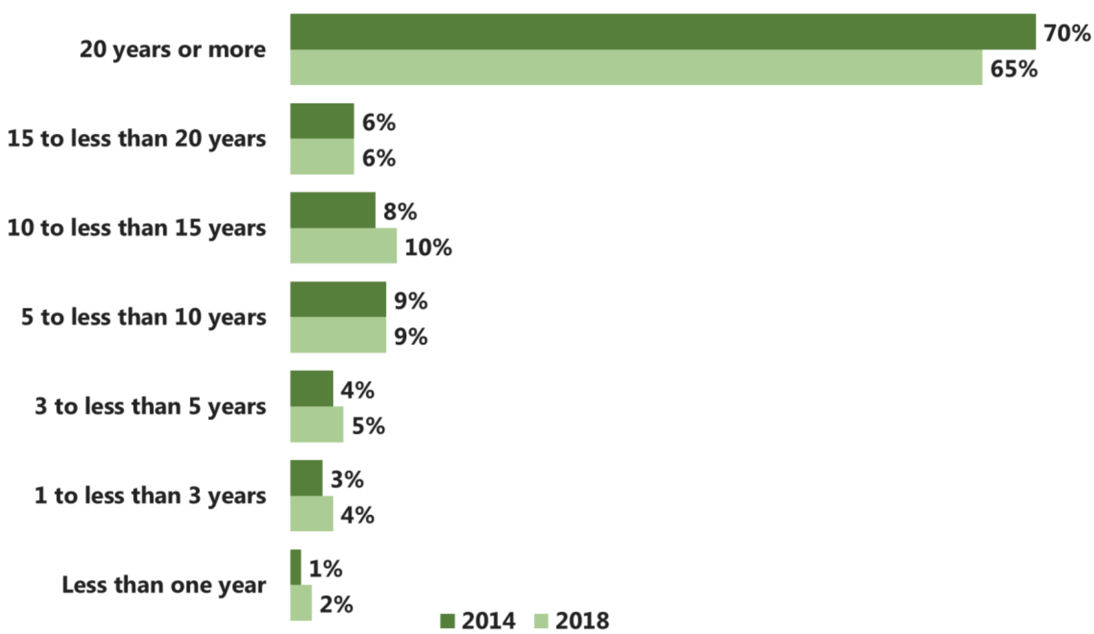
2.10 In line with the findings above, comments provided by the crofters demonstrate that familial connections and tradition play a key role in why they work their croft:

"To carry on the crofting tradition in the same township since the mid-1700's for the future generations."

"The croft was in my wife's family for at least 100 years."

2.11 The majority of crofters reported that they had been crofting for 20 years or more (65%), a small decrease since 2014 when 70% had been crofting for this period of time. Just 6% had worked their croft for less than three years (Figure 2.8).

Figure 2.8 Number of years as a crofter (706)

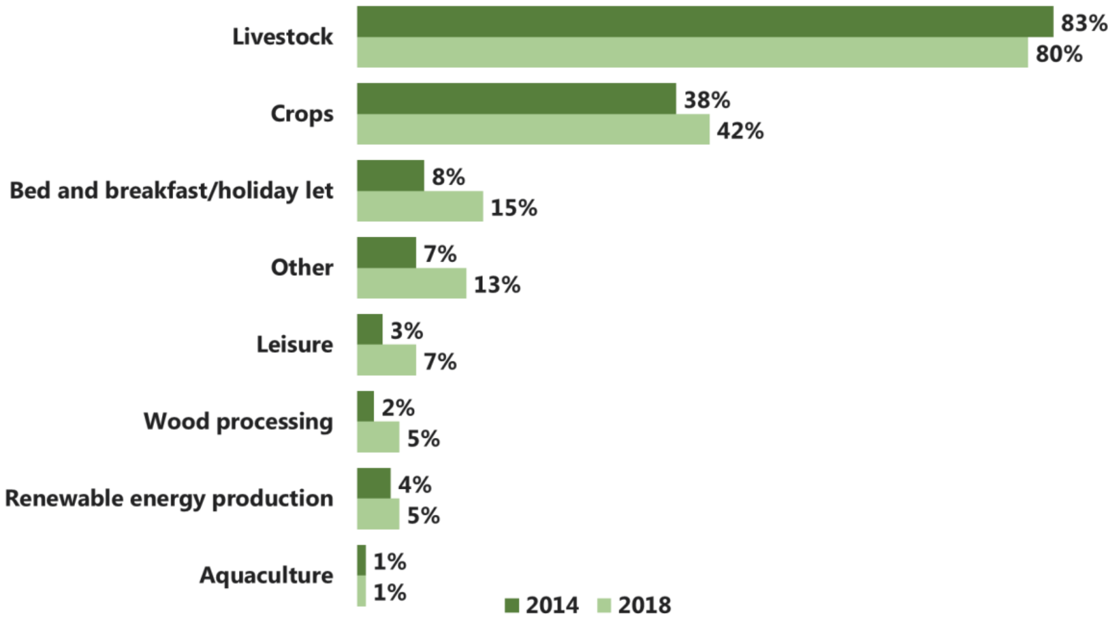


3. Crofting activities

3.1 The most common crofting activity undertaken was raising livestock: 80% of crofters dedicated at least some time to managing livestock (24% did so exclusively). A further 42% grew crops[8] on their croft but this was much less likely to be their only activity (2% did this exclusively).

3.2 While only small proportions used their croft for other activities, a number of these have seen a small increase since 2014 suggesting greater diversification than in the previous wave of the survey. For example, 8% of crofters offered B&B accommodation in 2014, compared with 15% in 2018, and leisure activities have more than doubled from 3% to 7% in the same period (Figure 3.1).

Figure 3.1 Types of crofting activities currently undertaken (562)

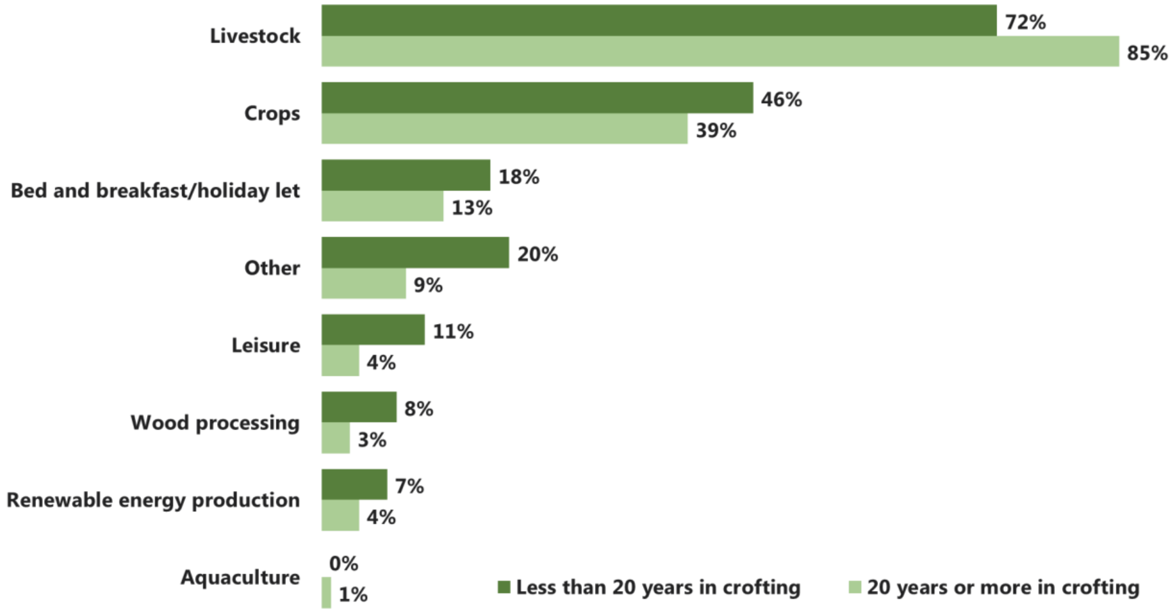


3.3 There were differences in crofting activities by the length of time a respondent had worked a croft. Most notably, those who had worked a croft for 20 years or more were more likely to keep livestock than those who had done so for less time (85%, compared with 72%). The activities that have seen increases over time (bed and breakfast accommodation, leisure and wood processing) were also those that were more likely to be done by those who have worked a croft for less than 20 years[9] (Figure 3.2).

[8] The questionnaire did not cover the type of crops planted.

[9] The crofting activities of those who had been crofting for less than 3 years, for 3 years to less than 10 years and for 10 years to less than 20 years are very similar so were analysed as a single group.

Figure 3.2 Type of croft activity undertaken by length of time crofting (551)



3.4 There were some differences in crofting activity by local authority. For example, livestock was most common in Shetland (95%) (Table 3.1). Due to the small base sizes for Argyll and Bute and Orkney, the results for these areas should be interpreted with caution.

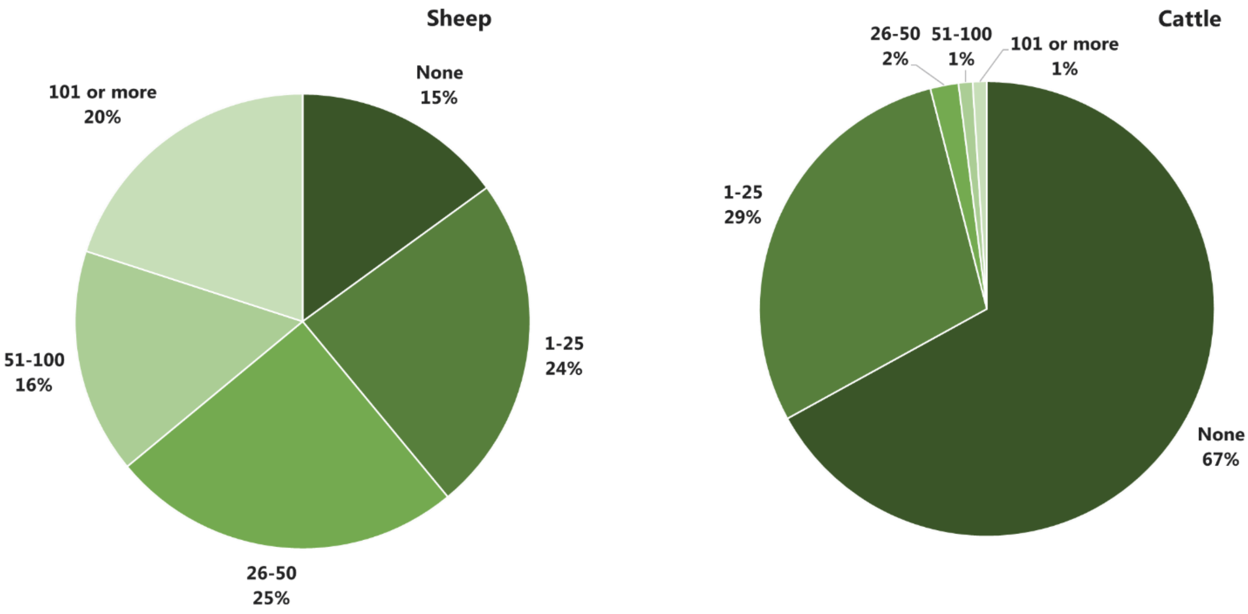
Table 3.1 Crofting activity by local authority

	Argyll and Bute *(18)*	Highland *(243)*	Na h-Eileanan Siar *(215)*	Orkney Islands *(9)*	Shetland Islands *(63)*
Livestock	67%	78%	74%	89%	95%
Crops	39%	44%	39%	33%	41%
Bed and Breakfast/holiday let	22%	19%	10%	11%	10%
Other	17%	16%	11%	-	11%
Leisure	-	7%	10%	-	5%
Wood processing	11%	7%	3%	-	2%
Renewable energy production	6%	5%	6%	11%	3%
Aquaculture	-	1%	1%	-	-

3.5 Other differences were limited. Female crofters were more likely than males to say that they had a bed and breakfast/holiday let (22% of women, compared to 12% of men). However, this was the only difference by sex. There were no differences by tenure or age of respondents.

3.6 Among those that kept livestock, 85% kept sheep and 33% kept cattle (Figure 3.3).

Figure 3.3 Type of livestock owned (426)

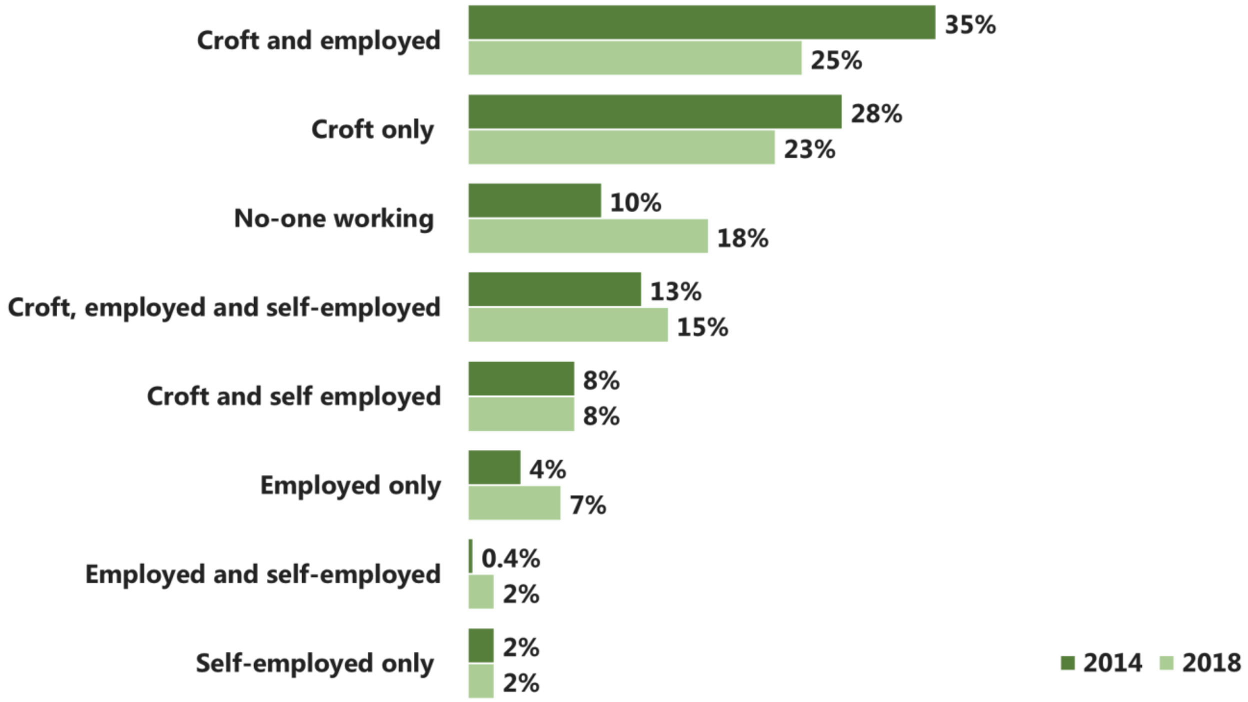


3.7 Crofters were asked to provide information on the number of adults in the household who actively work on the croft, in paid employment and in self-employed work. They were separately asked to estimate the number of hours worked in an average week on the croft and in outside work.

3.8 Figure 3.4 shows the breakdown of the working status of households in the survey. Overall, 59% of households had at least one resident that worked in employment outside of crofting. Nearly a fifth (18%) of crofters said that no-one within their household was employed in crofting activities, or elsewhere, nearly double that of 2014 (10%).

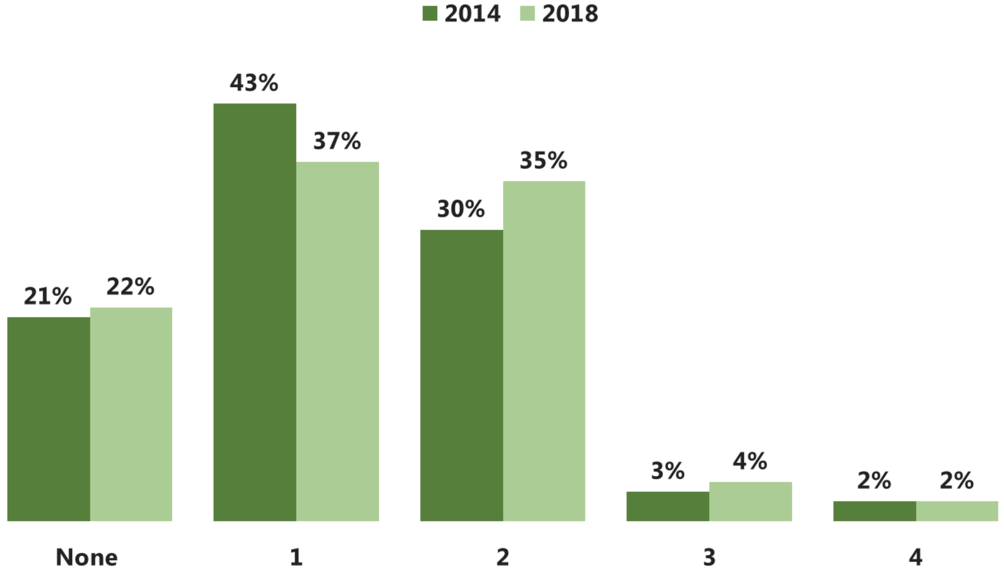
3.9 Twenty-three per cent of crofters worked on crofting exclusively a small reduction from the 28% that said the same in 2014 (Figure 3.4).

Figure 3.4 Different working activities of households



3.10 Figure 3.5 show the number of adults within the household who actively work on the croft. It was most common for either one (37%) or two (35%) adults in the household to work on the croft – a similar picture to 2014, although there has been a decrease in the proportion of households that have one active croft worker (from 43% in 2014) and an increase in the proportion that have two (from 30% in 2014).

Figure 3.5 Number of adults in household working on the croft: 2014 (625); 2018 (599)



3.11 Crofting households where at least one person actively worked on a croft, spent a mean of 22 hours per week engaged in crofting activities (an increase compared with 2014 when households spent a mean of 12 hours per week on crofting activities). The median number of hours was 14.

3.12 Where there are one or more members of the household working on non-crofting activities, a mean of 40 hours was spent on these (a decrease from 49 hours a week in 2014). The median was 39.

4. Financial issues in crofting

4.1 Crofters were asked to approximate their revenue from crofting-based activities in the last twelve months, including any agricultural support funds such as the CAP Rural Payment or funding from the Scottish Rural Development Programme, to the nearest £100.

4.2 Revenue[10] from crofting activities in the last twelve months varied enormously from nothing to over £100,000, while the median revenue reported was £2,000, unchanged since 2014. As shown in Figure 4.1, over half of those that reported some revenue (56%) had received £5,000 or less and a quarter of crofters (25%) reported no revenue in the last 12 months[11]. The mean revenue reported was much higher than the median, at £13,095, indicating a small number of very high responses.

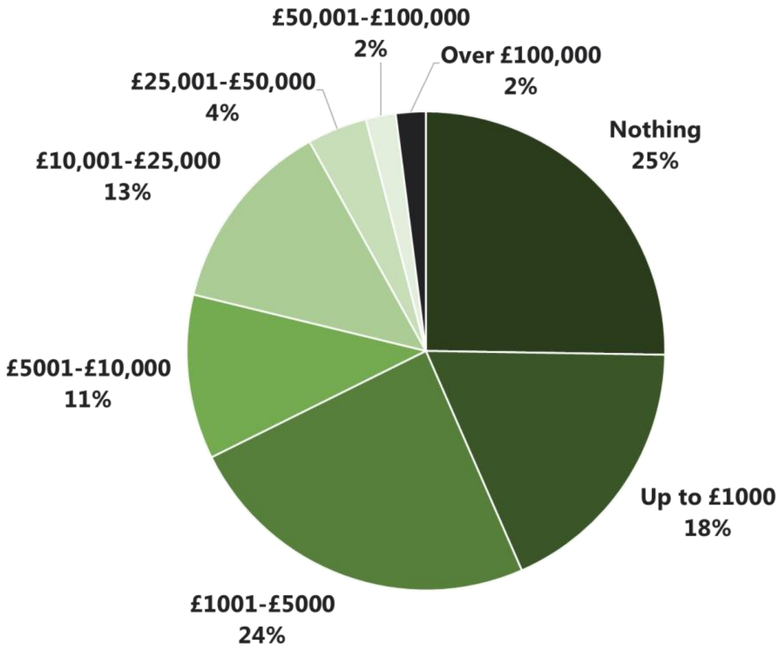
4.3 As this question was answered by only three quarters (74%) of those who completed the survey, it is possible that the below pie chart overstates overall revenue levels due to non-response among non-earners. There is also a possibility, however, that some high income earners did not report their revenue and that overall revenue levels are therefore more polarised than the chart suggests.

4.4 While the mean revenue had increased significantly since 2014, from £4,900, the proportion of those reporting no revenue at all had also risen considerably, from 18% in 2014 to 25% in 2018.

[10] Revenue was defined as total income including from subsidies, before deducting outgoings including rental and mortgage costs.

[11] Analysis was conducted on the age profile to ascertain whether those respondents of retirement age were more likely to report ‘no income’, however age profile had no statistically significant influence.

Figure 4.1 Q *Approximately what was your revenue before deducting costs from crofting-based activities in the last 12 months (excluding agricultural support funds)?*
(Base: 546)



4.5 Those who had been crofting for more than 20 years reported the highest median revenue at £3,000, while those who had been crofting less than three years[12] were the most likely to report no revenue, with over half of crofters (58%) from this group reporting “nothing”. However, this should be interpreted with caution as the base size is very small. Only 38 crofters had been crofting for less than three years so 58% equates to 22 that reported “nothing”.

4.6 There was no significant difference between the median or mean revenues reported between owner-occupier and tenant crofters. While the mean and median revenue figures varied considerably between local authorities, with the latter shown below, the base sizes were too small for these differences to be significant.

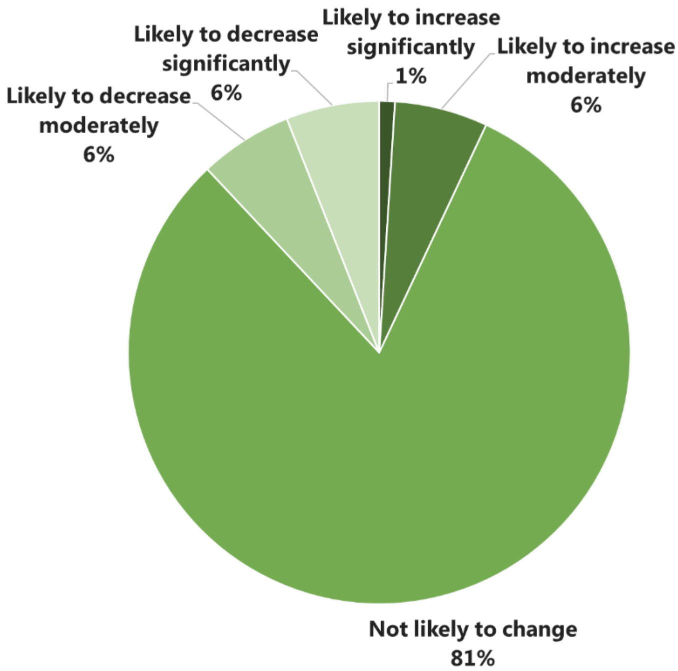
Table 4.1 Median revenue by local authority and by tenure status (Base: 546)

	Median revenue
Tenure Status	
Tenant *(550)*	£3,967
Owner-occupier *(180)*	£4,988
Local authority	
Argyll and Bute *(25)*	£2,602
Highland *(312)*	£4,183
Eilean Siar *(306)*	£2,100
Orkney Islands *(14)*	£20,000
Shetland Islands *(73)*	£9,511

[12] Due to the small base size of this group, results should be interpreted with caution and no more detailed subgroup analysis can be conducted.

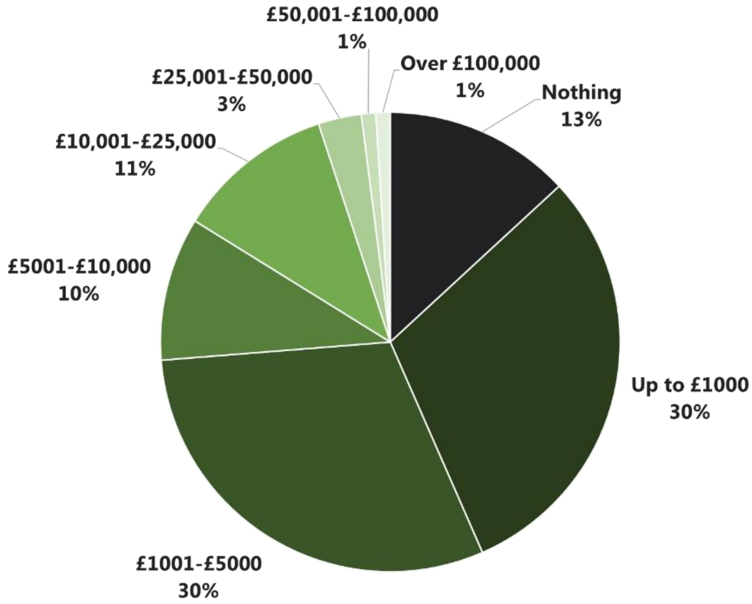
4.7 As can be seen in Figure 4.2, the vast majority of crofters (81%) thought their revenue was not likely to change over the next twelve months, while six per cent anticipated an increase and 12% a decrease. This represents a decrease by around half both among those expecting an increase in revenue (from 14%) and among those expecting a decrease in revenue (from 22%), with a considerable rise in the numbers anticipating no change (from 63%).

Figure 4.2 Q *How do you anticipate this will change over the next 12 months?* (Base: 448)



4.8 The majority of crofters (73%) reported no running costs related to their crofting-based activities or running costs of under £5,000, as shown in Figure 4.3. The three most common responses were up to £1,000, £1,001-£5,000 and Nothing at 30%, 30% and 13% respectively. Almost three in ten (29%) respondents did not report their running costs, however; thus the proportion with no running costs could be considerably higher than the results indicate. The median running cost reported was £2,000 (while the mean was £8,385).

Figure 4.3 Q Approximately what were your business running costs related to your crofting-based activities in the last 12 months? (Base: 519)



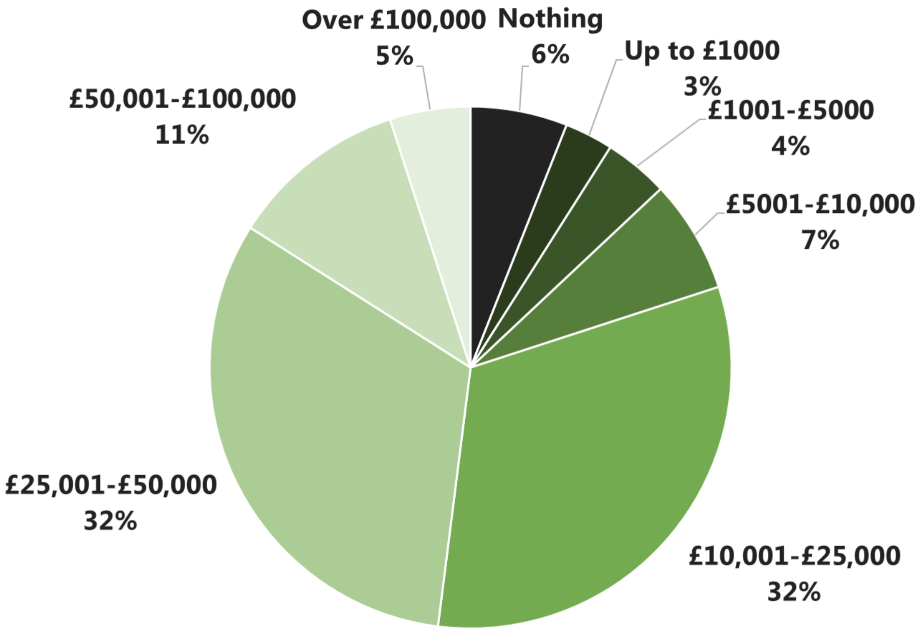
4.9 Crofters were also asked about their total household income from all non-crofting activities in the last twelve months including all sources of paid employment and pensions as well as interest on bank deposits and investments.

4.10 The median household income reported from non-crofting activities was £25,000, up from £21,000 in 2014. As shown in Figure 4.4, just under a third (32%) of crofters reported an income of £10,001-£25,000, with the same proportion (32%) reporting an income of £25,001-£50,000. The mean income reported for the last year was considerably higher than the median, at £41,760, up from £27,500 in 2014, which can be attributed to a small number of very high responses.

4.11 The median combined revenue from both crofting and non-crofting activities, minus business running costs was £29,000, higher than the median Scottish household income of £25,200[13].

[13] https://beta.gov.scot/publications/poverty-income-inequality-scotland-2014-17 It should be noted that the figure for crofting households does not take into account household composition, however.

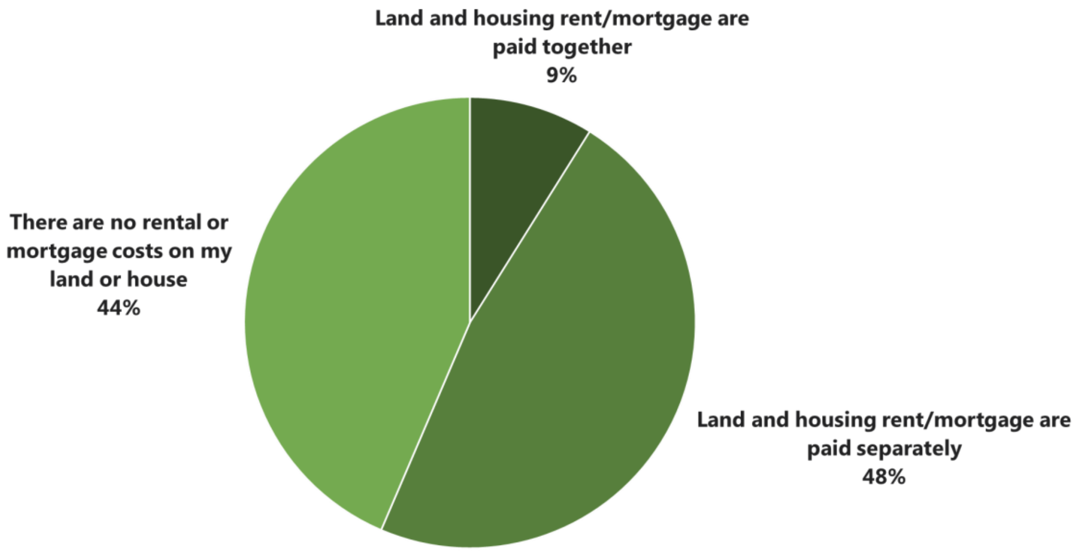
Figure 4.4 Q Approximately, what was your total household income from all non-crofting activities in the last 12 months? (Base: 514)



4.12 Most crofters (84%) anticipated no change in their income over the next twelve months with just 7% expecting an increase and 8% anticipating a decrease.

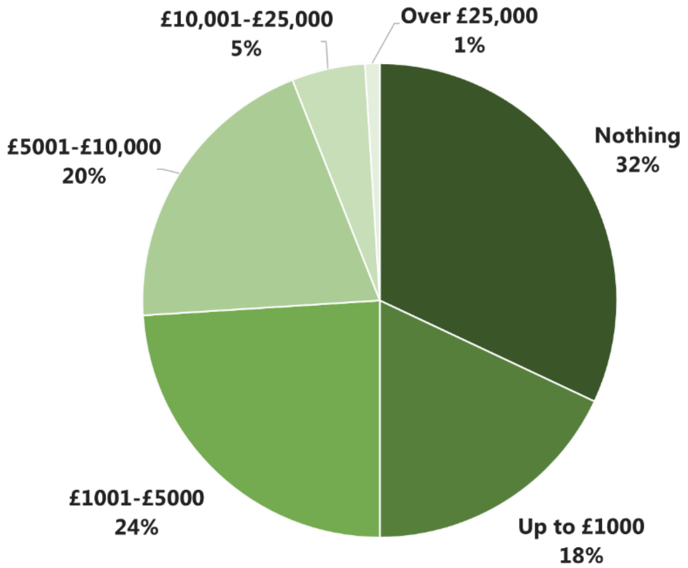
4.13 When asked about paying for land rent/mortgage costs, around six in ten (57%) crofters reported having rental or mortgage costs. Among those who did, as Figure 4.5 illustrates, it was most common for them to be paid separately at 48% and just 9% reporting that they are paid together. These results were all largely consistent with the results in 2014.

Figure 4.5 Q *Do you pay for your land rent/mortgage together with your housing rent/mortgage?* (Base: 640)



4.14 Those who had rental or mortgage costs were asked what their costs for housing were in the last twelve months. As Figure 4.6 illustrates below, these costs varied enormously from nothing to over £25,000. While almost one fifth of crofters (18%) reported no housing costs and 44% did not state their costs, the median response was £1,029, while the mean response was £3,549. Around a quarter (24%) of crofters who answered this question reported costs of £1,001-£5,000, and a further one in five reported costs of £5,001-£10,000 (20%) and costs of up to £1,000 (18%).

Figure 4.6 Q *Approximately, what were your rent/mortgage costs in the last 12 months for housing?* (Base: 214)

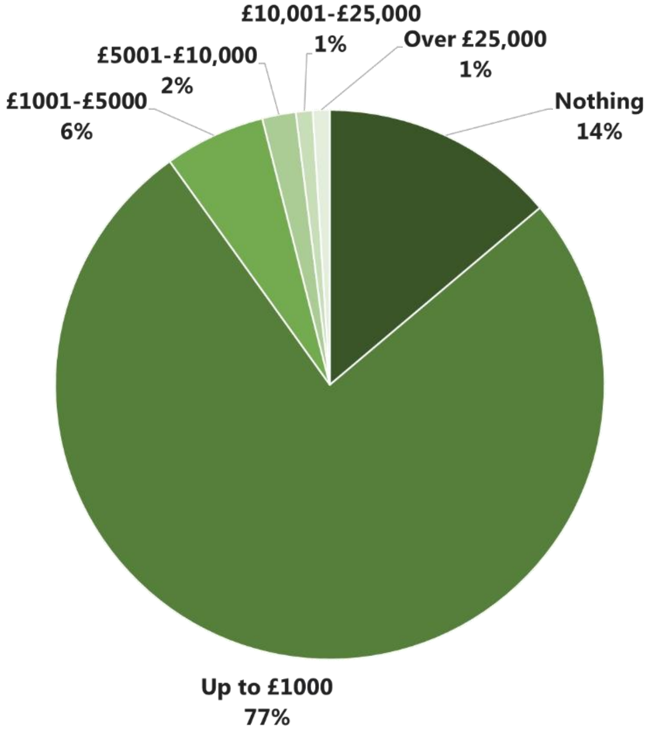


4.15 Compared to 2014, there has been an increase both in the proportion of crofters that pay rental/mortgage costs for their housing and in the average costs. While the proportion of those paying nothing has decreased from 52% to 32%, the mean cost has risen from £1,500 per annum to £3,549.

4.16 The average *land* rental and mortgage costs were much lower, with a median annual cost of just £64 and a mean cost of £741, though these have also risen considerably since 2014, from £25 and £270 respectively.

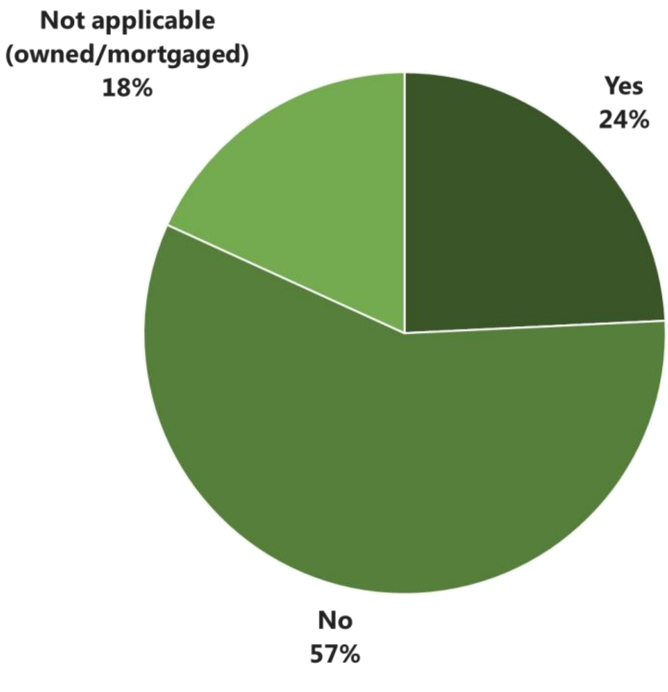
4.17 As can be seen in Figure 4.7, over three quarters of crofters (77%) reported costs of up to £1,000, with a further 14% reporting no costs at all. Six percent of crofters reported costs of £1,001-£5,000 and just four percent reported costs of over £5,000.

Figure 4.7 Q *Approximately, what were your rent/mortgage costs in the last 12 months for land?* (Base: 319)



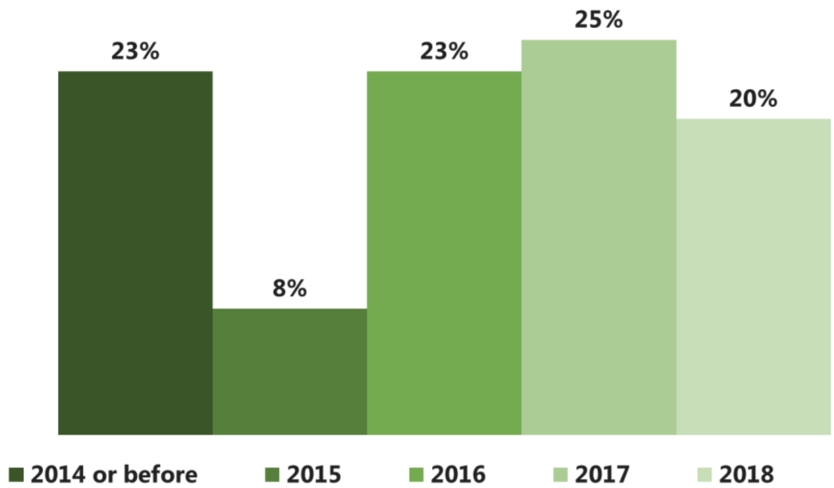
4.18 Consistent with previous figures, only just under a quarter (24%) of those with rental or mortgage costs said these were regularly reviewed while almost six in ten (57%) said they were not, as shown in the chart below.

Figure 4.8 Q *Does your rent get regularly reviewed?* (Base: 351)



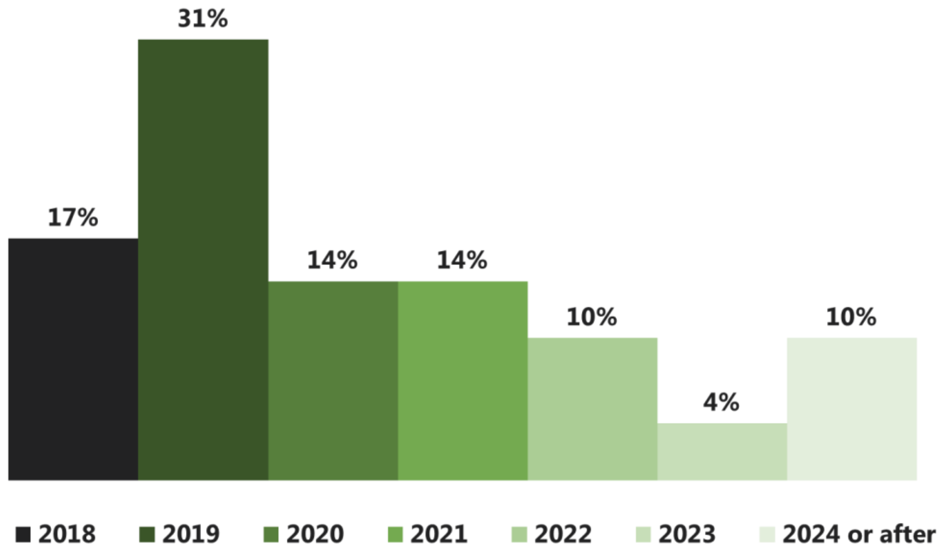
4.19 A very small number of crofters (56) reported the date of their last rent review. As shown in Figure 4.9, of those whose costs were regularly reviewed, just over two thirds said their rent had been reviewed in the last two years, since 2016 (68%) a further 8% stated they had been reviewed in 2015. A third of crofters (33%) did not state when their rent was last reviewed.

Figure 4.9 Q *When was your rent last reviewed?* (Base: 56)



4.20 Those whose rent was reviewed were also asked when it is next due to be reviewed. While this question also produced a very small base (31), as seen in Figure 4.10 the most common dates for the next review were in 2018 and 2019 with just under half of crofters expecting a review either this or next year (48%) and a further 28% expecting a review in 2020 or 2021. Almost two thirds of crofters whose rent is regularly reviewed, however, did not report the anticipated date of their next review.

Figure 4.10 Q *When is it due for the next review?* (Base: 31)

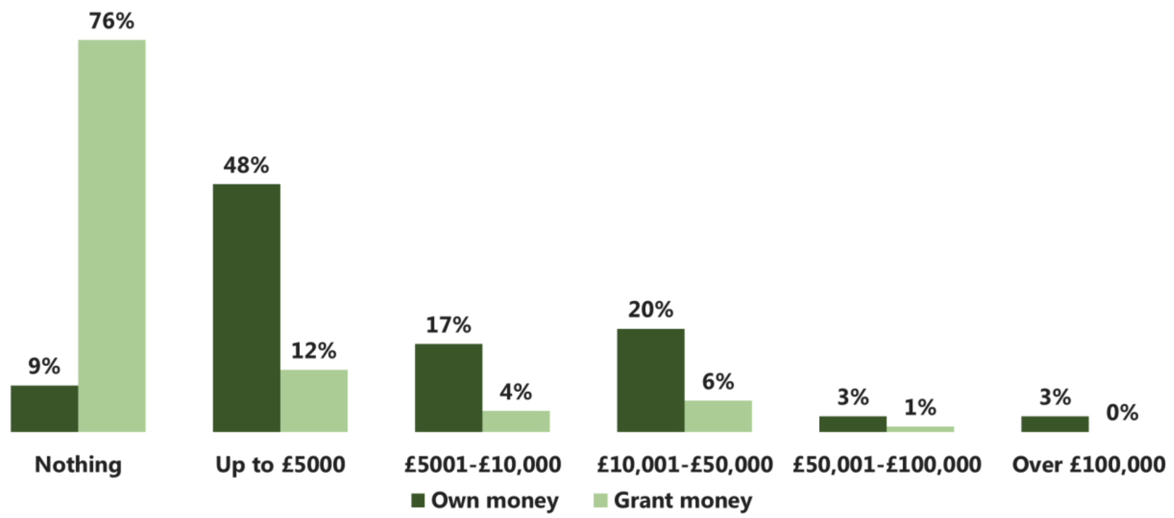


5. Investments in the croft

5.1 Crofters were asked whether they had invested in their croft in the last three years. Just over two thirds of crofters (68%) stated that they had invested in their croft in this period while a third (32%) had not. This represents a considerable increase in the proportion of individuals investing, up from 58% in the 2011-2014 period. This is also higher than the proportion of crofters who said that they planned to invest in their croft in the 2015-2018 period in the previous survey (55%).

5.2 Of those that had invested in their croft since 2015, the median figure was £5,000, while the mean was much higher at £20,007. As Figure 5.1 illustrates, over half of those that had invested (48%) had invested up to £5,000 of their own money, with; around a fifth had invested £5,001-£10,000 (17%) and a further one in five had invested £10,001-£50,000 (20%).

Figure 5.1 Q *Approximately how much in total was invested in your croft during the 2015-2018 period (*Base: 412)



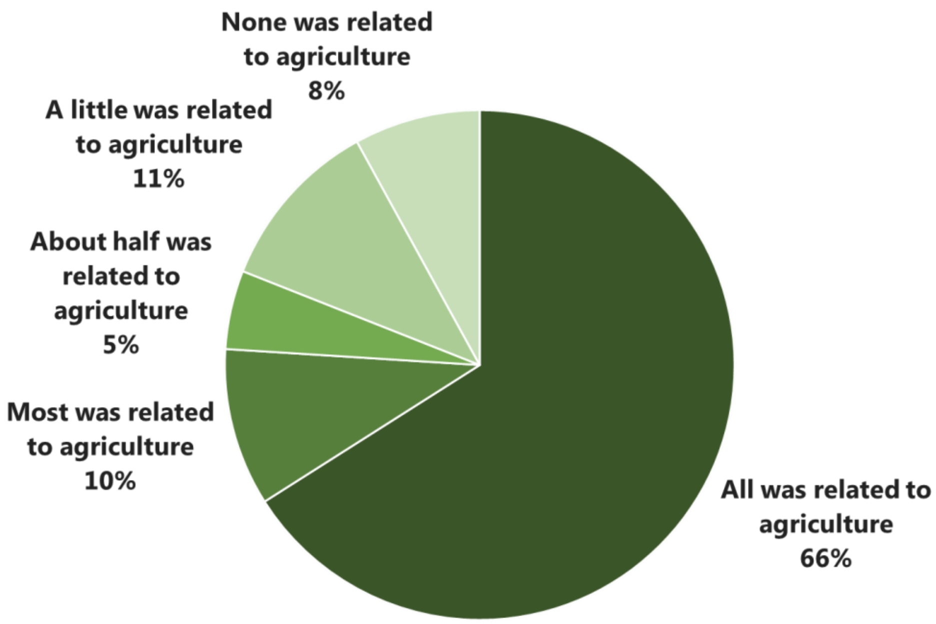
5.3 Fewer crofters had invested money from grant money/support schemes in the last three years with less than a quarter (24%) of those who had invested reporting such investment, and the median just £1,000 while the mean investment from these was £6,554.

5.4 While the proportion of those who had received public funding was consistent with that in 2014, the mean assistance per croft had increased from £4,900.

5.5 Less common still was investment through secured and unsecured loans with just 5% having made each of these types of investment. The mean investment through a secured loan was £3,664 (median was £0), while the mean investment from an unsecured loan was £4,115 (median £0).

5.6 In line with results for the 2011-2014 period, the majority of investments were related to agriculture with two thirds (66%) of crofters reporting that all their investment related to agriculture and a further one in ten (10%) saying that most of their investment related to agriculture, as shown in Figure 5.2. Less than one in ten (8%) crofters stated that none of their investment was related to agriculture.

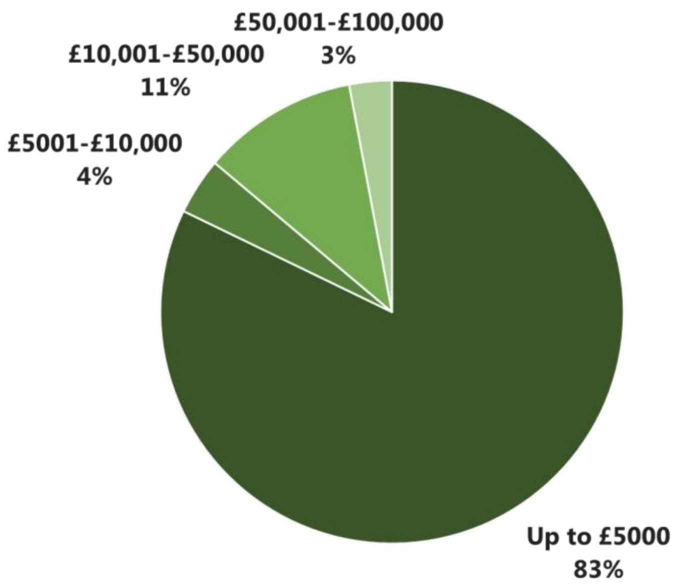
Figure 5.2 Q *To what extent was the investment in your croft during the 2015-2018 period related to agriculture?* (Base: 433)



5.7 Around one in six (16%) of those who had invested in their croft in the last three years reported receiving additional income as a result of this investment. The median additional income was £1,500, while the mean figure was £6,219. The median reported additional income has fallen since 2011-2014, from £2,100, while the mean figure has increased from £4,400.

5.8 As can be seen in Figure 5.3, the majority of those who had received additional income had received up to £5,000 (83%), while 4% reported receiving £5,001-10,000, 11% received £10,001-£50,000 and 3% received £50,001-£100,000.

Figure 5.3 Q *How much additional income have you received as a result of the investment made in your croft?* (Base: 69)

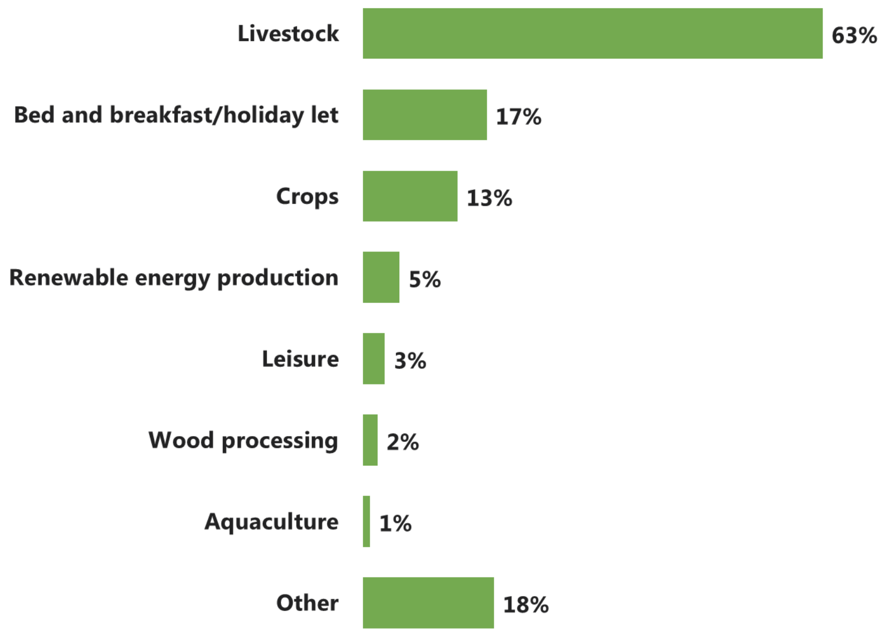


5.9 More than eight in ten crofters (84%) said this was unlikely to change in the next twelve months, while 12% expected it to increase moderately and 4% to decrease moderately.

5.10 Livestock was the greatest contributor to additional income among crofters, as shown in Figure 5.4.[14] Almost two thirds of crofters attributed additional income to their livestock, while 17% had received additional income from a Bed and breakfast/holiday let, and 13% stated that crops had produced additional income.

[14] Respondents were asked to selected one option, however some selected more than one. Therefore, this figure shows the full data as multi-coded.

Figure 5.4 Q *Which of the following is the planned investment in your croft during the 2019-2022 period related to?* (Base: 334)



5.11 Crofters were asked about their planned investment for the next three years. Just under half (48%) indicated that they did plan to invest in their croft within this time frame, down from 55% in 2014.

5.12 The median planned investment stated was £2,000, while the mean figure was much higher at £16,450, and up from £9,100 in 2014.

5.13 Livestock was by far the most common area of intended investment with almost six in ten (57%) crofters citing it as an area of planned investment, while crops were the next most common, at just under three in ten (28%) followed by bed and breakfast/holiday let at 16%.

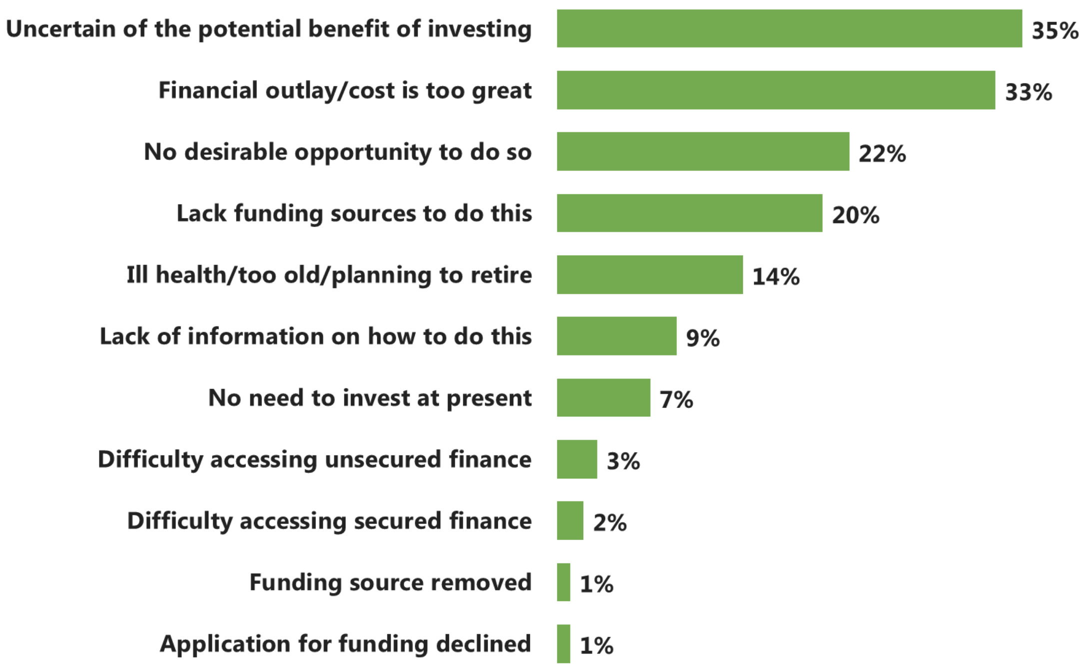
5.14 Over half of crofters (52%) did not plan to invest in their croft in the next three years. Younger crofters tended to be more likely to invest than older crofters, with the highest proportion of 35-54 year olds planning to invest (70%) of all age groups, compared to just 30% of those aged over 65. Time spent crofting was also related to crofters' likelihood to invest in the next three years with those who had been crofting 3-10 years the most likely to invest, at 72%.

5.15 Consistent with 2014, the three most common reasons for not investing were uncertainty of the potential benefit of investing (35%), that the financial cost/outlay of investing was too great (33%) and that there was no perceived desirable opportunity to do so (22%), as illustrated in Figure 5.5.

5.16 Reasons for not investing varied by gender and tenure. Male crofters were more likely than female crofters (37% compared to 21%) to cite uncertainty of the potential benefit of investing as a reason for not planning to invest; while Owner Occupier crofters were more likely than Tenant crofters to indicate that they felt there was no need to invest at present (11% compared to 5%).

5.17 Other reasons commonly given were a lack of funding sources to invest (20%); old age, ill health or retirement plans (14%) and a lack of information on how to invest (9%).

Figure 5.5 Q *If you are not planning on investing in the period 2019-2022 what are the main reasons?* (Base: 259)



5.18 Some crofters provided commentary on why they were not planning to invest in the future, which was in line with the findings above.

"Lack of investment due to no subsidies being received. No entitlements to be able to receive subsidy."

"No idea where to get proper, instructive, or helpful advice."

6. Sources of information on crofting

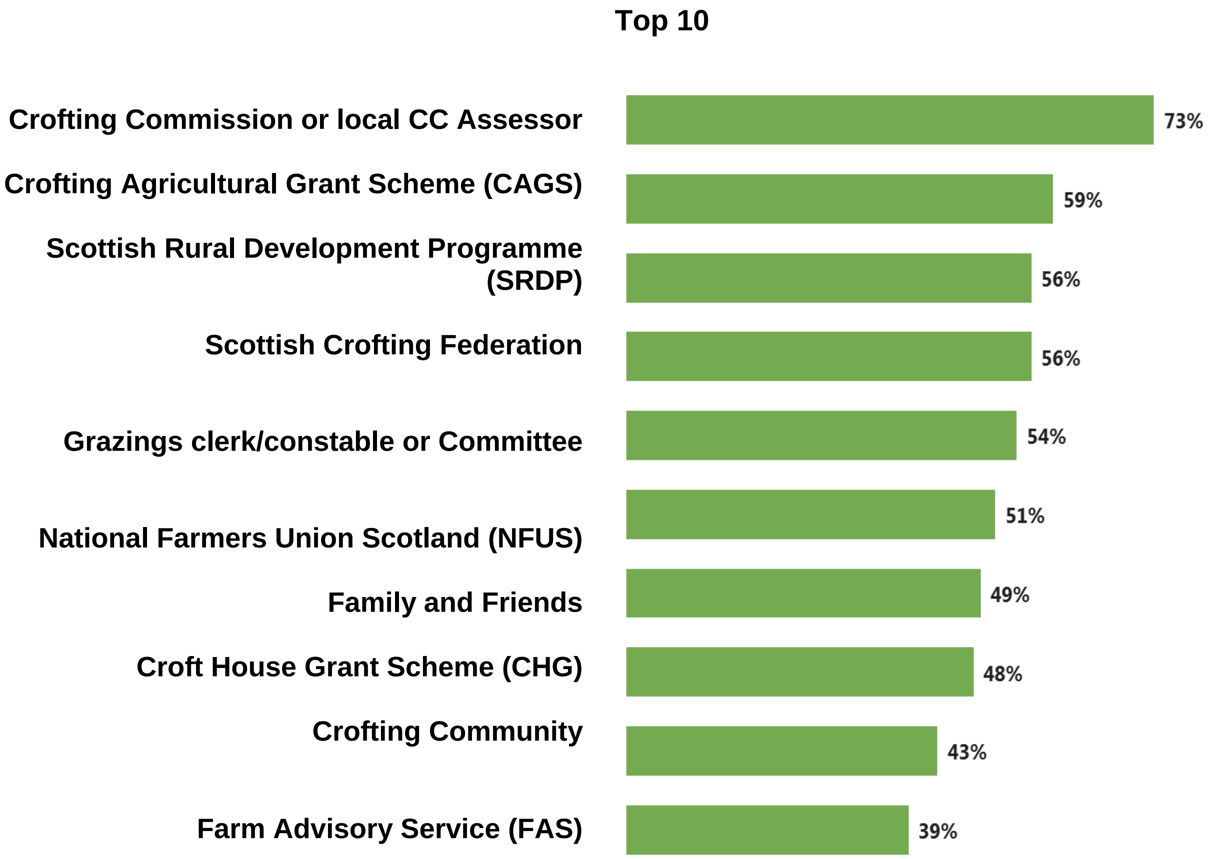
6.1 Crofters were asked about their awareness of and use of advice and support on crofting activities.

6.2 Just over a third of crofters had looked for advice or support on crofting activities in the last 12 months. Tenant crofters were more likely than owner occupiers to have looked for advice (43% compared to 34%), while those over 65 were most likely not to have looked for advice or support, with almost three quarters of this age group not having done so (74%).

6.3 Younger crofters were more likely to seek out advice or support than older crofters. Forty-seven per cent of 35-54 year olds and 44% of 55-64 year olds had sought out advice, compared with 26% of those aged 65 years or over[15].

6.4 From a list of support sources, crofters were asked to indicate which they were aware of. As shown in Figure 6.1, almost three quarters of participants were aware of the Crofting Commission or local ACC Assessor (73%), while almost six in ten were aware of the Crofting Agricultural Grant Scheme (59%) with similar numbers aware of the Scottish Rural Development Programme (56%) and the Scottish Crofting Federation (56%).

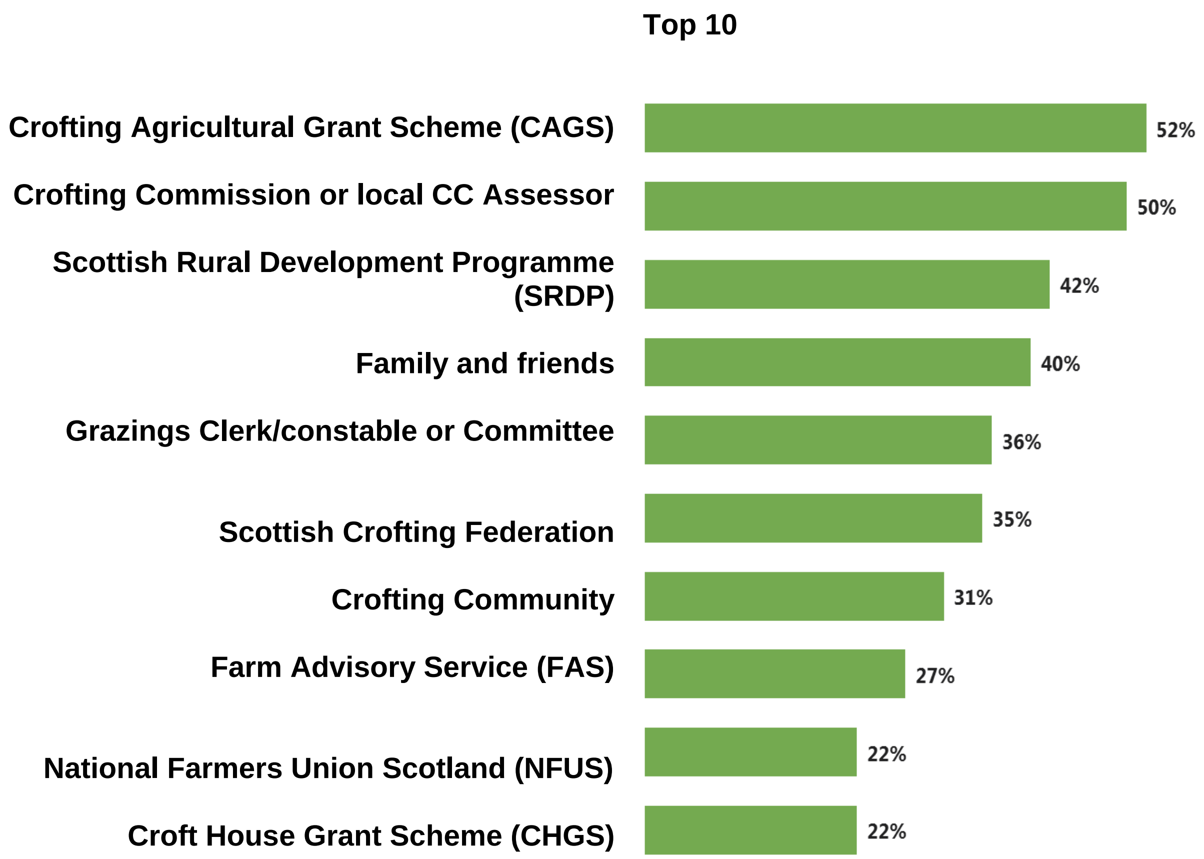
Figure 6.1 Q *Which of the following sources of advice/support are you aware of?* (Base: 627)



15 The base size for those aged 16-34 was too small to include in the analysis.

6.5 While there was a fair level of awareness of support sources, fewer crofters were prepared to use these. Most crofters, however, (52%) said that they would use the Crofting Agricultural Grant Scheme (CAGS), while half of crofters (50%) said they would use the Crofting Commission or local CC Assessor and over four in ten (42%) crofters said they would use the Scottish Rural Development Programme (SRDP), as illustrated in Figure 6.2 below.

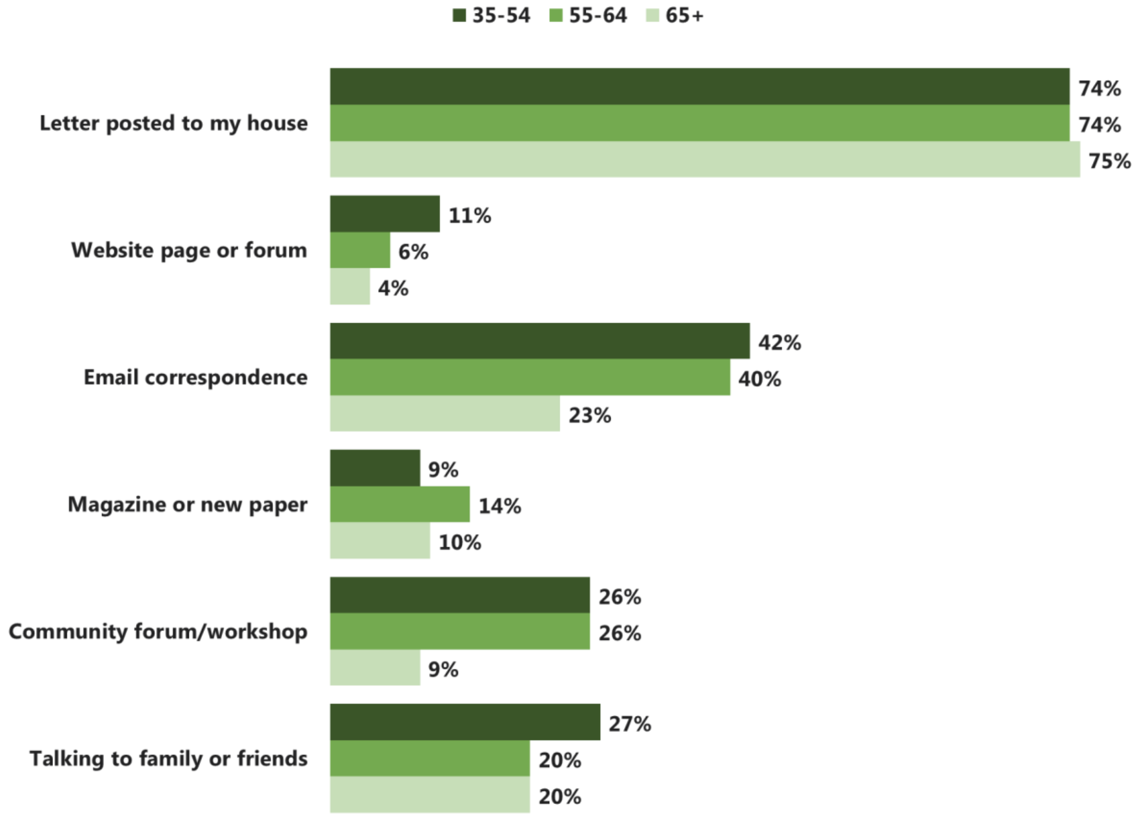
Figure 6.2 Q *Which of the following sources of advice/support would you use?* (Base: 526)



6.6 When asked how they would prefer to receive future information and guidance on crofting activities, a letter posted to their address was by far the most popular response with almost three quarters of crofters (74%) choosing this option. Email correspondence was the next most popular response, selected by a third of participants overall (34%), though less than a quarter of those in the 65+ age group (23%) would prefer this form of communication. Talking to friends and family and a community forum/workshop were also popular.

6.7 While receiving a letter in the post was the most popular option among all age groups, younger crofters were more likely than older crofters to want to receive information through other methods. In particular, those aged 35-54 and 55-64 were more likely to want to received information through email correspondence and through a community forum/workshop than those aged 65+ (Figure 6.3).

Figure 6.3 ***Preferred mode of future information and guidance on crofting activities by age (693)***[16]



[16] The base size for those aged 16-34 was too small for analysis and are not included in the chart.

7. The future of crofting

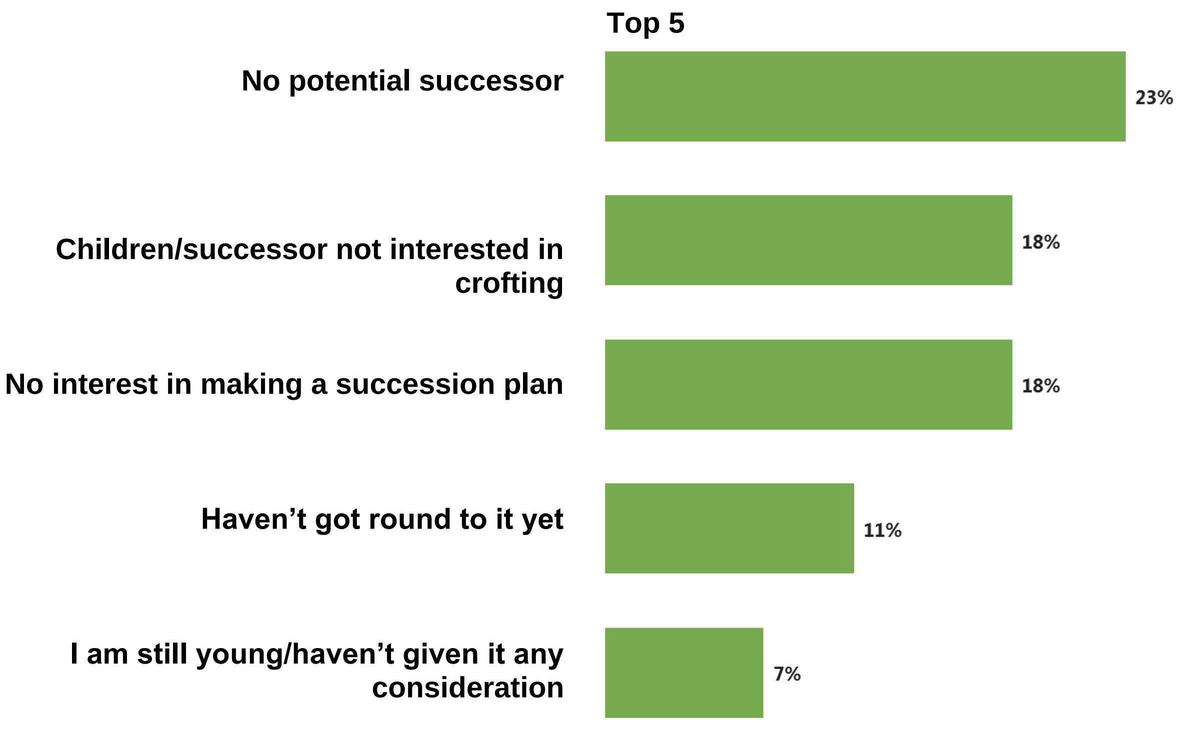
7.1 Crofters were asked a range of questions pertaining to the future of crofting, both in relation to their own croft and to crofting at large.

7.2 Just over half of crofters (53%) stated that they do not currently have a succession plan in place for when they pass on their croft or tenancy agreement, while 47% said they did have one. This is consistent with the results in 2014, when 54% of crofters said they did not have a plan.

7.3 Perhaps unsurprisingly, those who had been crofting 20 years or more were most likely to have a succession plan in place, with 53% reporting to have one.

7.4 Amongst those without a succession plan in place, the most commonly cited reasons were having no potential successor, children/successor not being interested in crofting and no interest in making a succession plan, as shown in Figure 7.1.

Figure 7.1 Q *What is the main reason for not having a succession plan in place?* (Base: 316)

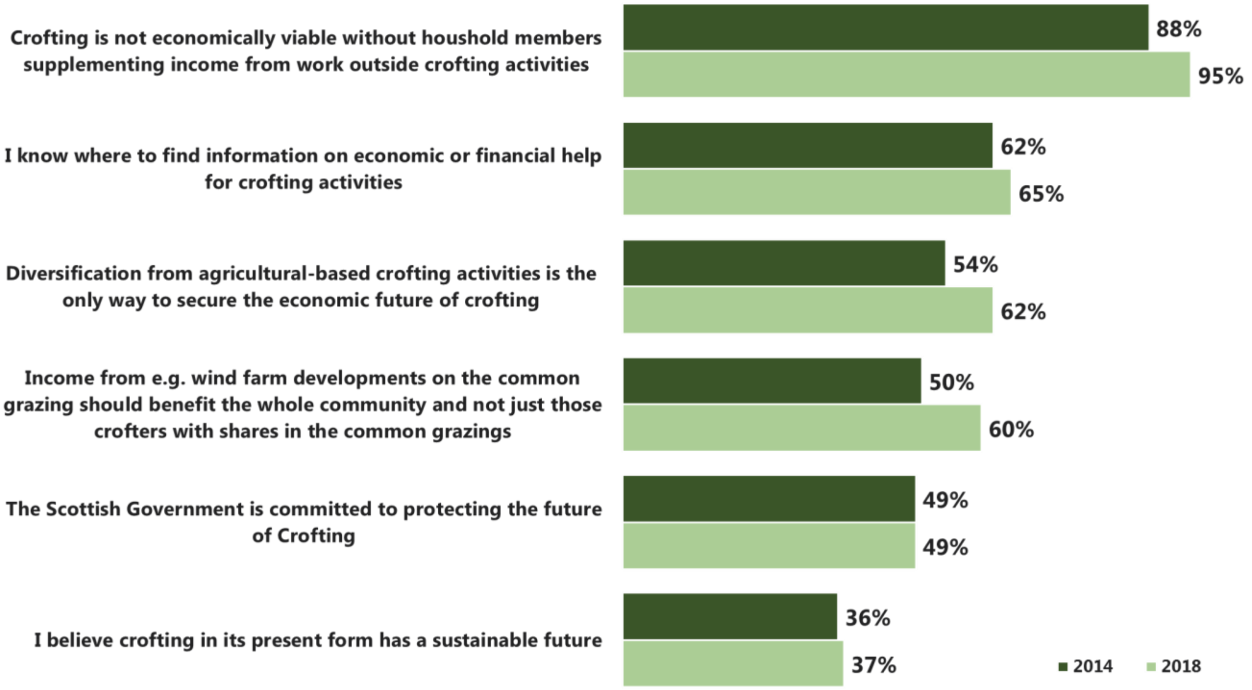


7.5 Crofters were also asked to consider the extent to which they agreed or disagreed with a number of statements about the longer term outlook and future role of crofting in Scotland. The results are shown in Figure 7.2 below.

7.6 There was almost a consensus among crofters that crofting was not viable without a supplementary income from work outside crofting activities, with 95% of crofters agreeing with this statement, while views towards other issues were more mixed. A majority (62%) of crofters expressed the view that it was necessary for crofting to continue to diversify from agricultural-based activities in order to secure its economic future, and less than four in ten (37%) crofters agreed that crofting had a sustainable future in its present form. Furthermore, most crofters (60%) were keen to see income from developments on the common grazings shared with the wider community.

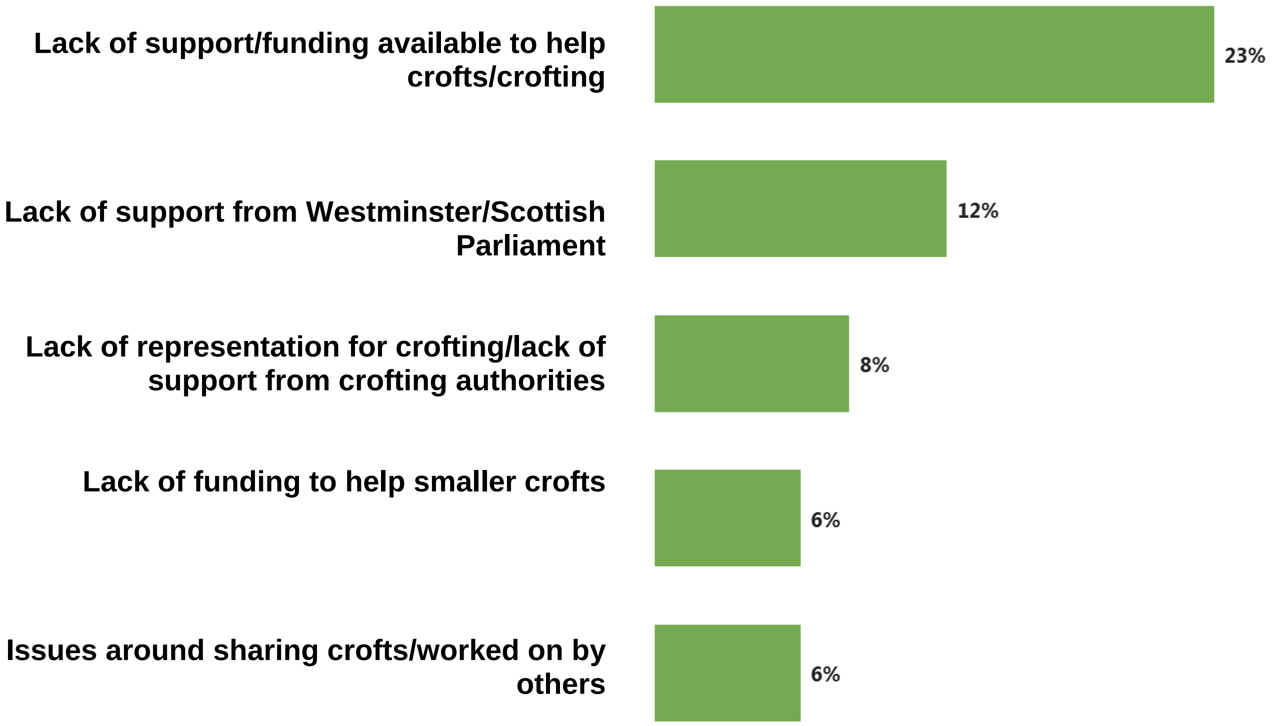
7.7 Generally, crofters knew where to go to find information on economic or financial help for crofting activities with two thirds (65%) agreeing with this statement, while they were divided on the Government's commitment to the future of Crofting with just under half agreeing that the Scottish Government is committed to protecting the future of Crofting (49%).

Figure 7.2 Q *To what extent do you agree or disagree with the following statements about crofting?* (Base: 701)



7.8 Crofters were given the opportunity to make any further comments regarding their croft or the future of crofting in Scotland. Almost four in ten (38%) of crofters took the opportunity to do so. As shown in the below chart, the most common themes touched upon by crofters were a perceived lack of support/funding available to crofters (23%); a lack of support from Westminster or the Scottish Government (12%); and lack of representation for crofting/lack of support from crofting authorities (8%).

Figure 7.3 *Chart showing the top five themes in further comments regarding crofts and the future of crofting in Scotland* (Base: 701)



7.9 Crofters were given the opportunity at the end of the survey to provide open comments regarding their croft or the future of crofting in Scotland. In total 272 crofters provided a response.

7.10 There was a clear appetite for more financial support and wider encouragement and representation, both from the Scottish Government and representative bodies such as the Crofting Commission, especially for smaller crofts. Concerns were also expressed around the under-utilisation of croft land with some crofters discussing their sub-letting and sharing arrangements and others advocating greater letting and sub-letting among ageing crofters. The quotes below illustrate some of the key themes that came through in crofters' comments.

"Crofting requires the support of the government. Financially this funding allows me to improve the land and environment. I would not have been able to make improvements I have done without the crofting grants."

"I would like to see the Crofting Commission take a more active role in crofting communities and support the crofters."

“If smaller holdings are not starting to get the necessary economic support from the government or the crofting entities - and considering that these smaller holdings make up for the majority in remote areas - we do not believe that crofting in Scotland will get any better.”

“Until old crofters realise they can, in complete safety, let their croft land with no risk of a right-to-buy or any other way they could lease it, they won't. So viable units are left to rack and ruin.”

8. Conclusion

8.1 The profile of crofters has changed little over the past four years. They are still older than the general population – both across Scotland and within the respective crofting local authorities. They are also still predominately male (although the proportion of female crofters has doubled from 13% in 2014 to 26% in 2018). In line with the findings from 2014, crofters responding to the survey tended to be a homogenous group. For the most part, they lived in 1-2 person households, were born in Scotland, had been in crofting for 20 years or more.

8.2 The majority of crofting activities are rooted in the traditional agricultural pursuits of livestock and crops – a similar picture to 2014. However, while only small proportions used their croft for other activities, a number of these activities have seen increases since 2014 (namely, bed and breakfast accommodation/holiday lets, leisure, and wood processing) suggesting greater diversification. This diversification was greatest among those that had been crofting for less than 20 years.

8.3 There have been some changes in working patterns among crofters in the last four years – the proportion of those working only on the croft and undertaking no other employment has decreased. Furthermore, there has been an increase in the proportion of households that have no-one working on the croft or other earning activities (from 10% in 2014 to 18% in 2018).

8.4 Overall, the economic picture for crofters is mixed. While both crofting and non-crofting income has increased, the income derived from crofting activities is more polarised than in the past – there have been increase at both extremes of the income scale since 2014. The median revenue increased from £21,000 in 2014 to £25,000 in 2018 – and a greater increase was seen in the mean figure suggesting a greater number of very high revenues. However, there has also been an increase in the proportion of crofters who report making no revenue at all from crofting activities.

8.5 This variation in crofting revenue meant that a larger proportion were relying on income from non-crofting activities. As noted above, non-crofting income increased from 2014 to 2018 (although there was no increase in the proportion who made nothing as there was with crofting activities).

8.6 Further financial pressure has come from a greater proportion of crofters that pay rental or mortgage costs for their housing – and among those that do, the mean costs that they pay have increased in the last 4 years (from £1,500 per annum in 2014 to £3,549 in 2018). While land rental or mortgage costs were lower than the equivalent for housing, they also saw a considerable increase (from £270 in 2014 to £741 in 2018).

8.7 Despite this, there has been greater investment in crofts in the last three years than in the previous wave of the survey. In 2014, 58% of crofters said that they had invested in their croft, compared with 68% in 2018. While 92% of those who had invested, invested some of their own money, only a quarter (24%) invested grant money or money from support schemes.

8.8 This greater investment does seem positive. However, when asked if they planned to invest in the next three years, just under half of crofters (48%) said that they did, a decrease since 2014 (55%). The reason not to invest remain the same as in the previous wave: uncertain potential of investing; financial outlay/cost is too high; and no desirable opportunity to do so.

8.9 So as with the current financial picture for crofters, views of the future of crofting were also mixed. While there was an almost consensus that crofting is not economically viable without supplementing your income in some way (95% in 2018), there has been an increase in the proportion who see diversification as the way to secure the economic future of crofting (from 54% in 2014 to 62% in 2018).

8.10 The comments provided by crofters would suggest that they see improvements required in the following areas to secure the future of crofting:

- perceived lack of support/funding available to crofters
- perceived lack of support from government
- perceived lack of representation from crofting authorities.

Appendix A - Questionnaire

SURVEY OF THE ECONOMIC CONDITION OF CROFTING 2015-2018

How to complete this survey

Where possible, questions have been designed to be easy to complete and you need only tick the box or boxes that best reflect your answer. Some questions will need you to write in a brief response. If you wish to comment on your answer or provide any further information, please use the space provided or write in/under the appropriate table.

PLEASE RETURN YOUR COMPLETED SURVEY IN THE FREEPOST ENVELOPE PROVIDED BEFORE 17th September 2018.

Information required by this survey

You will be asked questions about your crofting-related activities. We are defining crofting-based activities as commercial activities which you run on your croft which use the resources or products of the location. This might include activities associated with farming, tourism, leisure and renewable energy production.

For this study, activities such as a hairdressing business or a shop selling produce outside of the croft are not classified as “crofting related activities", even if they are run from the location of your croft. Only include these activities when answering questions which are related to **non-crofting** related activities.

Please be assured that the confidentiality of your responses will be maintained and that no personal details or individual responses will be disclosed to any third party.

Further information

If you require any further information or would like more information on how your data will be used, please do not hesitate to contact our **Crofters Hotline on xxxxxx** or email **xxxxxxx**. Alternatively, if you would like to get in touch with the Scottish Government, please contact xxxx on xxxxx or at xxxxx.

Businesses for which information is required

- Information you provide should relate only to the registered tenant(s) or owner-occupier crofter(s) of the croft associated with this address.
- If you are the *landlord of the croft*, please pass this form to the registered crofter.
- If there is *more than one registered crofter* on the croft, please complete jointly, clearly detailing income and outgoings etc., for all involved.
- If *you have more than one croft*, please complete this form about the croft associated with this address.
- Please write in the details of the croft you are completing the survey about in the box below.

Name of Croft	
Postal Address	
Post Code	

Section 1: About your crofting household

This section asks about the people within your household so we can understand the views and experiences of different household, e.g. how different age groups perceive the challenges currently facing crofters. This information will not be used to identify you and will only be analysed collectively with other responses.

Q1.1 **How would you describe your gender identity?**
PLEASE TICK ✓ ONE BOX ONLY

- ☐ Man
- ☐ Woman
- ☐ In another way

Q1.2 **What is your age?**
PLEASE TICK ✓ ONE BOX ONLY

- ☐ 16-24
- ☐ 25-34
- ☐ 35-44
- ☐ 45-54
- ☐ 55-64
- ☐ 65+

Q1.3 **Including yourself, how many people live in your household? Please tick one box only**
PLEASE TICK ✓ ONE BOX ONLY

- ☐ One (Single occupancy household) → **Go to Section 2**

- ☐ Two people
- ☐ Three people
- ☐ Four people
- ☐ Five or more people (Please write in number below)

→ **Go to Q1.4**

☐

Q1.4 **Thinking about the other occupants of your household, how many belong to each of the following gender/age bands?**
PLEASE WRITE IN NUMBERS FOR EACH THAT APPLIES

	16-24 years	25-34 years	35-44 years	45-54 years	55-64 years	65+ years
Man	☐	☐	☐	☐	☐	☐
Woman	☐	☐	☐	☐	☐	☐
Identify in another way	☐	☐	☐	☐	☐	☐

Q1.5 **How many children under 16 years do you have living at home and elsewhere?**
PLEASE WRITE A NUMBER FOR EACH (if none, write in 'X')

☐ Number of children living in household
☐ Number of children living elsewhere
→ **Go to Q1.6**

☐ Not applicable (no children under 16 in household nor elsewhere) → **Go to Section 2**

Q1.6 **How many of your children under 16 years practice crofting or have expressed an interest in becoming a crofter?**
PLEASE WRITE A NUMBER FOR EACH (if none, write in 'X')

☐ Number of children currently crofting
☐ Number of children interested in crofting

Section 2: About your crofting background

This section asks about the reasons why you became a crofter and the work that you do.

Q2.1 **Were you born in Scotland?**
PLEASE TICK ✓ ALL THAT APPLY

☐ Yes, born in Scotland
☐ No, but parents are/family is native to Scotland
☐ No, born elsewhere in UK
☐ No, born elsewhere outside of the UK

Q2.2 **What were your main reasons for becoming a crofter?**
PLEASE TICK ✓ ALL THAT APPLY

☐ I was brought up in a crofting family
☐ To live amongst a small community
☐ A family croft became available
☐ To live with family and/or friends
☐ To live with spouse/partner
☐ To provide a source of income
☐ Other PLEASE TICK ✓ AND WRITE IN BELOW

Q2.3 **For how long have you been crofting?**
PLEASE TICK ✓ ONE BOX

☐ Less than one year
☐ 1 to less than 3 years
☐ 3 to less than 5 years
☐ 5 to less than 10 years
☐ 10 to less than 15 years
☐ 15 to less than 20 years
☐ 20 years or more

Q2.4 **How many crofts do you currently operate as a tenant and how many as an owner-occupier crofter?**

PLEASE WRITE A NUMBER FOR EACH IN BELOW

☐	Number of crofts operated as tenant
☐	Number of crofts operated as owner-occupier

Q2.5 **Which of the following crofting activities are performed at your croft and approximately what proportion in % does each account for?**

PLEASE TICK ✓ ALL THAT APPLY AND WRITE IN PERCENT FOR EACH

☐	Livestock		→ **Go to Q2.6**
☐	Crops		→ **Go to Q2.7**
☐	Bed and breakfast/holiday let		
☐	Aquaculture		
☐	Wood processing		
☐	Renewable energy production		
☐	Leisure		
☐	Other		

Q2.6 **Of your livestock, how many are…?**

PLEASE WRITE A NUMBER FOR EACH IN BELOW

☐	Sheep
☐	Cows

Q2.7 **Do you have a succession plan in place for when you pass on your croft or tenancy agreement?**

PLEASE TICK ✓ ONE BOX

- ☐ No → **Go to Q2.8**
- ☐ Yes (please briefly describe your plan below) → **Go to section 3**

Q2.8 **What is the main reason for not having a succession plan in place?**
PLEASE TICK ✓ ONE BOX

- ☐ No potential successor
- ☐ Children/successor not interested in crofting
- ☐ No interest in making succession plan
- ☐ Legislation presenting succession to more than one successor
- ☐ Other (please specify)

Section 3: About your crofting activities

This section asks about the work done by people in your household with respect to crofting & elsewhere and the costs relating to the running of your croft. The purpose of this section is to understand the financial issues that crofters face. The information provided will assist in developing Government policies on crofting and help address any issues that may exist

Q3.1 **Of the adults (aged 16 years and over) who live in your household, how many were involved in the following activities in the last 12 months?**
PLEASE WRITE IN A NUMBER FOR EACH (IF NONE, WRITE IN 'X')

Actively worked on your croft	
Worked in paid employment outside of crofting	
Received income from non-crofting self-employment	
Attended full-time education	
Attended part-time education	

Q3.2 **In the last 12 months, approximately how many hours on an average week does each adult (aged 16 and over) work on the following?**
PLEASE WRITE IN NUMBERS FOR EACH (IF NONE, WRITE IN 'X')

	Crofting	Paid non-crofting work
Adult 1		
Adult 2		
Adult 3		
Adult 4		

Adult 5 ☐ ☐

Adult 6 ☐ ☐

Q3.3 **Approximately, what was your revenue before deducting costs from crofting-based activities in the last 12 months (please include any agricultural support funds such as Single Farm Payment or funding from the Scottish Rural Development Programme)?**
PLEASE WRITE IN TO THE NEAREST £100

☐

Q3.4 **How do you anticipate this will change over the next 12 months and why?**
PLEASE TICK ✓ ONE BOX AND WRITE IN BELOW

- ☐ Likely to increase significantly
- ☐ Likely to increase moderately
- ☐ Not likely to change
- ☐ Likely to decrease moderately
- ☐ Likely to decrease significantly

REASON (WRITE IN BELOW)

☐

Q3.5 **Approximately, what was your business running costs related to your crofting-based activities (please see front page for our definition of "crofting based activities") in the last 12 months.**
(*Please exclude land and housing rent or mortgage payments but include all crofting related expenditure except investments which will be asked about in Section 4 on page 7*)?
PLEASE WRITE IN TO THE NEAREST £100

☐

Q3.6 **Approximately, what was your total household income from all non-crofting based activities in the last 12 months (please include all sources of paid employment, pensions, benefits and interest on bank deposits & investments)?**
PLEASE WRITE IN TO THE NEAREST £100

☐

Q3.7 **How do you anticipate this will change over the next 12 months and why?**
PLEASE TICK ✓ ONE BOX AND WRITE IN BELOW

- ☐ Likely to increase significantly
- ☐ Likely to increase moderately
- ☐ Not likely to change
- ☐ Likely to decrease moderately
- ☐ Likely to decrease significantly

REASON (WRITE IN BELOW)

☐

Q3.8 **Do you pay for your land rent/mortgage together with your housing rent/mortgage?**
PLEASE TICK ✓ ALL THAT APPLY

☐ Land and housing rent/mortgage are paid together → **Go to Q3.9**
☐ Land and housing rent/mortgage are paid separately → **Go to Q3.9**
☐ There are no rental or mortgage costs on my land or house → **Go to section 4**

Q3.9 **Approximately, what were your rent/mortgage costs in the last 12 months for…?**
PLEASE WRITE IN TO THE NEAREST £100

☐	**Housing rent/mortgage costs**
☐	**Land rent/mortgage costs**

Q3.10 **Does your rent get regularly reviewed?**
PLEASE TICK ✓ ONE BOX

☐ Yes → **Go to Q3.11**
☐ No → **Go to section 4**
☐ Not applicable (owned/mortgaged) → **Go to section 4**

Q3.11 When was your rent last reviewed and when is It due for the next review?
PLEASE WRITE IN MONTH/YEAR FOR EACH

Last review	☐	Month	☐	Year
Next review	☐	Month	☐	Year

Section 4: Investing in your croft

This section asks about investments that you have made in the last three years, such as fixed and moveable equipment, additional livestock, refurbishment of croft house or outbuildings, or a new croft house. Again, the purpose of this section is to understand the financial issues that crofters face.

Q4.1 **Have you invested in your croft during the 2015-2018 period?**
PLEASE TICK ✓ ONE BOX ONLY

☐ Yes → **Go to Q4.2**
☐ No → **Go to Q4.7**

Q4.2 Approximately how much in total was invested in your croft during the 2015-2018 period?
PLEASE WRITE IN TO THE NEAREST £100

	Own money
	Grant money/support schemes

Q4.3 How much, if any, of the money invested was raised through a secured or unsecured loan?
PLEASE WRITE IN TO THE NEAREST £100

	Secured loan
	Unsecured loan

Q4.4 To what extent was the investment in your croft during the 2015-2018 period related to agriculture?
PLEASE TICK ✓ ONE BOX AND WRITE IN BELOW

- ☐ All was related to agriculture
- ☐ Most was related to agriculture
- ☐ About half was related to agriculture
- ☐ A little was related to agriculture
- ☐ None was related to agriculture

Q4.5 How much, if any, additional income (excluding government assistance which is covered at Q4.2) have you received as a result of the investment made in your croft?
PLEASE WRITE IN TO THE NEAREST £100

Q4.6 How do you anticipate this will change over the next 12 months and why?
PLEASE TICK ✓ ONE BOX AND WRITE IN BELOW

- ☐ Likely to increase significantly
- ☐ Likely to increase moderately
- ☐ Not likely to change
- ☐ Likely to decrease moderately
- ☐ Likely to decrease significantly

REASON (WRITE IN BELOW)

Q4.7 Which of your activities produced the additional income?
PLEASE TICK ✓ ALL THAT APPLY

- ☐ Livestock
- ☐ Crops
- ☐ Bed and breakfast/holiday let
- ☐ Aquaculture
- ☐ Wood processing
- ☐ Renewable energy production
- ☐ Leisure
- ☐ Other

Q4.8 **Approximately how much, if any, do you plan to invest in your croft in the 2019-22 period?**
PLEASE WRITE IN TO THE NEAREST £100

If investment planned, go to Q4.8
If no investment planned, go to Q4.9

Q4.9 **Which of the following is the planned investment in your croft during the 2019-2022 period related to?**
PLEASE TICK ✓ ONE BOX AND WRITE IN BELOW

- ☐ Livestock
- ☐ Crops
- ☐ Bed and breakfast/holiday let
- ☐ Aquaculture
- ☐ Wood processing
- ☐ Renewable energy production
- ☐ Leisure
- ☐ Other

Q4.10 **If you are not planning on investing in the period 2019-2022 what are the main reasons?**
PLEASE TICK ✓ ALL THAT APPLY

- ☐ No desirable opportunity to do so
- ☐ Financial outlay/cost is too great
- ☐ Uncertain of the potential benefit of investing
- ☐ Lack of information on how to do this
- ☐ Lack of sources of funding to do this
- ☐ Application for funding declined
- ☐ Funding source removed
- ☐ Difficulty accessing unsecured finance
- ☐ Difficulty accessing secured finance
- ☐ Another reason (please specify below)

Q4.11 **Have you looked for any advice/support on crofting activities in the last 12 months?**
PLEASE TICK ✓ ONE BOX

- ☐ Yes
- ☐ No

Q4.12 **Which of the following sources of advice/support are you aware of and to which would you go for advice or support on crofting activities if needed?**
PLEASE TICK ✓ ALL THOSE YOU ARE AWARE OF AND THOSE YOU WOULD USE

	Aware of	Would use
Crofting commission or local CC Assessor	☐	☐
Scottish Rural Development Programme (SRDP)	☐	☐
Farm Advisory Service (FAS)	☐	☐
National Farmers Union Scotland (NFUS)	☐	☐
Scottish Crofting Federation	☐	☐
Croft House Grant scheme (CHG)	☐	☐

Crofting Agricultural Grant Scheme (CAGS)	☐	☐
Crofting Cattle Improvement Scheme (Bull hire scheme)	☐	☐
Government department (please state which below)	☐	☐
Grazings clerk/constable or Committee	☐	☐
Crofting community	☐	☐
Banks/finance house	☐	☐
Family and friends	☐	☐
Landlord of croft	☐	☐
Internet site (please specify which below)	☐	☐
Other (please specify below)	☐	☐
Don't know	☐	☐

Q4.13 How do/would you prefer to receive future information and guidance on crofting activities?
PLEASE TICK ✓ ALL THAT APPLY

- Letter posted to my address ☐
- Website page or forum (please state which below) ☐
- Email correspondence ☐
- Magazine or newspaper (please state which below) ☐
- Community forum/workshop ☐
- Talking to friends or family ☐
- Community forum/workshop ☐
- Talking to friends or family ☐
- Other (please specify below) ☐
- I prefer not to receive any information or guidance ☐
- Don't know ☐

Q4.14 To what extent do you agree or disagree with the following statements about crofting?
PLEASE TICK ✓ ONE BOX ONLY FOR EACH STATEMENT

		Strongly agree	Agree	Disagree	Strongly disagree	Don't know
a)	The Scottish Government is committed to protecting the future of crofting	☐	☐	☐	☐	☐
b)	Diversification from agricultural-based crofting activities is the only way to secure the economic future of crofting	☐	☐	☐	☐	☐

c)	Crofting is not economically viable without household members supplementing income from work outside of crofting activities	☐	☐	☐	☐	☐
d)	I know where to find information on economic or financial help for crofting activities	☐	☐	☐	☐	☐
e)	Income from, for example, wind farm developments on the common grazing should benefit the whole community and not just those crofters with shares in the common grazings	☐	☐	☐	☐	☐
f)	I believe crofting in its present form has a sustainable future	☐	☐	☐	☐	☐

Q4.15 **If you would like to make any further comments regarding your croft or the future of crofting in Scotland?**
Please write in below

social research

The views expressed in this report are those of the researcher and do not necessarily represent those of the Scottish Government or Scottish Ministers.

This document is also available from our website at www.gov.scot.
ISBN: 978-1-78781-445-5

The Scottish Government
St Andrew's House
Edinburgh
EH1 3DG

Produced for
the Scottish Government
by APS Group Scotland
PPDAS508406 (12/18)
Published by
the Scottish Government,
December 2018

GSR
GOVERNMENT SOCIAL RESEARCH
Social Science in Government

Social Research series
ISSN 2045-6964
ISBN 978-1-78781-445-5

Web and Print Publication
www.gov.scot/socialresearch

PPDAS508406 (12/18)