

MY LIFE IN THE HIGHLANDS AND ISLANDS RESEARCH

The Inner Moray Firth

Summary report

October 2022



EXECUTIVE SUMMARY – THE INNER MORAY FIRTH

This report presents the findings of a large-scale survey conducted by Ipsos on behalf of Highlands and Islands Enterprise (HIE) between 28th January and 25th March 2022. In total, 5,301 adults aged 16+ living in the Highlands and Islands of Scotland responded to the survey, including 1,719 in the Inner Moray Firth.

Connectivity and access to services

Households in the Inner Moray Firth are more likely to have most facilities or services available in their local area, compared to households in the Highlands and Islands region overall. This includes a primary school (85%), daytime bus service (83%), convenience store (79%), secondary school (58%), supermarket (56%) and evening bus service (52%).

Excluding those who don't know whether each service is available locally, households in the Inner Moray Firth are more likely than those across the region overall to be able to access the following services within a 20-minute drive or online – a GP (98% vs 97%) a physiotherapist (95% vs 89%), dental service (91% vs 85%) or mental health service (85% vs 80%).

Households in the Inner Moray Firth are more likely to be able to undertake a range of everyday tasks than those in the region overall. However, 28% still find it difficult to have a takeaway delivered (44% regionally) and around a fifth find it difficult to stream a TV programme or feature film online (18% vs 21% regionally) or to take out money from a cash machine (22% vs 28%).

Housing

Most households in the Inner Moray Firth say their housing situation meets their needs well. While around half (47%) say their home is expensive to heat and 14% that it is difficult to heat, these are lower than the averages regionally. Compared to the Highlands and Islands overall, households in the Inner Moray Firth are less likely to say there are empty properties that could be brought back into use (43% compared to 48%).

Employment and training

Views on employment and entrepreneurship are in line with the region overall. Just under a fifth (17%) of those in work are self-employed and 11% would like to start their own business (19% and 12% regionally). Residents in the Inner Moray Firth who have not accessed training are less likely than regionally to say they would find it difficult to do so in person (24% vs 30%).

Impact of Covid-19 and transport

Findings are in line with regional averages, with 90% of households in the Inner Moray Firth saying that goods are more expensive now than pre-pandemic. However, more are likely to say that 'businesses that closed because of lockdown haven't reopened' (61% vs 56% regionally).

Households in the Inner Moray Firth are more likely than average to rely on buses (23% vs 20%) and trains (15% vs 12%), and less likely to rely on air (13% vs 17%) and ferry (4% vs 23%) services. Levels of dissatisfaction with the frequency and cost of bus services are higher than regionally.

Participation, pride and local decision making

52% of Inner Moray Firth residents report taking part in activities in their local community, such as attending community events, membership of groups or sports clubs, and volunteering. This is slightly lower than in the region overall (55%).

85% of residents express pride in their local community (vs 88% regionally). In line with the Highlands and Islands overall, they are divided on whether local people are able to influence decision-making (28% agree and 33% disagree).

Towards net zero

33% of households in the Inner Moray Firth are planning to make energy efficiency improvements in the next two to three years, most commonly installing a smart meter (15%), new boiler/heating system (11%) and draught proofing (8%). More than a fifth would like to have a job that helps the environment or prevents climate change (22%).

Priorities for communities to thrive

As with regionally, 52% of Inner Moray Firth residents are optimistic about their community. The top priorities they identify for local communities to thrive are: housing for local families, more job opportunities and local businesses and trades. Fewer mention job opportunities as a priority than in the region overall (27% vs 32%), and more are likely to mention services to support older people living at home (22% vs 18%), social activities (19% vs 16%) and improved transport within the local area (19% vs 15%).

ACCESS TO FACILITIES AND SERVICES (1)

The majority of households in the Inner Moray Firth have most services available within a 20-minute drive of their local area. However, while more than half say they can access an evening bus service (64%) and day care facilities (55%) within a 20-minute drive, a quarter (24%) and a third (35%) respectively don't know where these services are located.

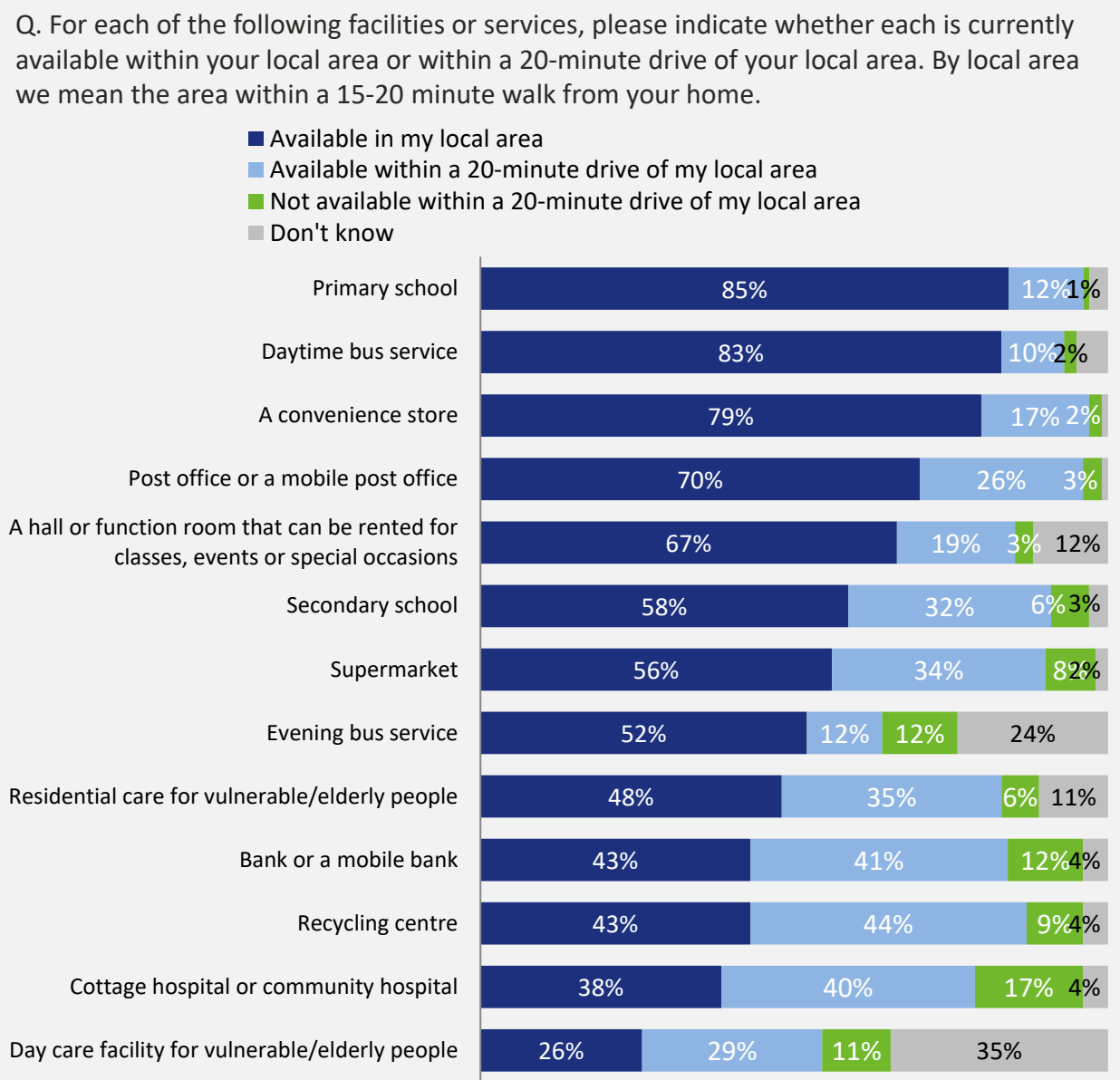
18% OF HOUSEHOLDS SAY IT IS DIFFICULT TO STREAM A TV PROGRAMME FILM, lower than the region overall at 21%

22% OF HOUSEHOLDS SAY IT IS DIFFICULT TO TAKE OUT MONEY FROM A CASH MACHINE, lower than in the region overall (28%)

28% OF HOUSEHOLDS SAY IT IS DIFFICULT TO HAVE A TAKEAWAY DELIVERED lower than in the region overall (44%)

Households in the Inner Moray Firth are more likely to have most facilities or services available in their local area compared to the region overall:

- a **primary school** (85% vs 77%)
- a **secondary school** (58% vs 51%)
- a **cottage/community hospital** (38% vs 35%)
- **residential care for vulnerable/elderly people** (48% vs 43%)
- a **convenience store** (79% vs 74%)
- a **supermarket** (56% vs 47%)
- a **daytime bus service** (83% vs 77%), and
- an **evening bus service** (52% vs 43%)



Base: All households in the Inner Moray Firth (1,413); fieldwork = 28 January – 25 March 2022

ACCESS TO FACILITIES AND SERVICES (2)

A majority of households in the Inner Moray Firth have access to a GP (86%) and a dentist (73%) permanently located within a 20-minute drive of their local area, and around three fifths can access a permanent or a visiting physiotherapist (64%) and a midwife or health visitor (59%) within this distance. A minority of 37% say they can access mental health services in person, while 49% don't know.

Excluding those who don't know whether the service is available locally, households in the Inner Moray Firth are **more likely than those across the region overall** to say they can access a **GP** (98% vs 97%), a **physiotherapist** (95% vs 89%), **dental services** (91% vs 85%), or **mental health services** (85% vs 80%), within a 20-minute drive or online.

Access to the other services is in line with the region overall – a midwife or health visitor (96% vs 95%) and home care services (95% vs 94%).

Reliance on and satisfaction with transport services

Most households in the Inner Moray Firth own at least one vehicle (89%), with around two fifths (44%) owning two or more, in line with the region overall (87% and 44% respectively).

- 85% rely on a car or van, in line with the region overall at 87%
- 23% rely on buses, higher than the region overall at 20%
- 15% rely on trains, higher than the region overall at 12%
- 13% rely on air transport, lower than the region overall at 17%
- 4% rely on ferries, lower than the region overall at 23%.

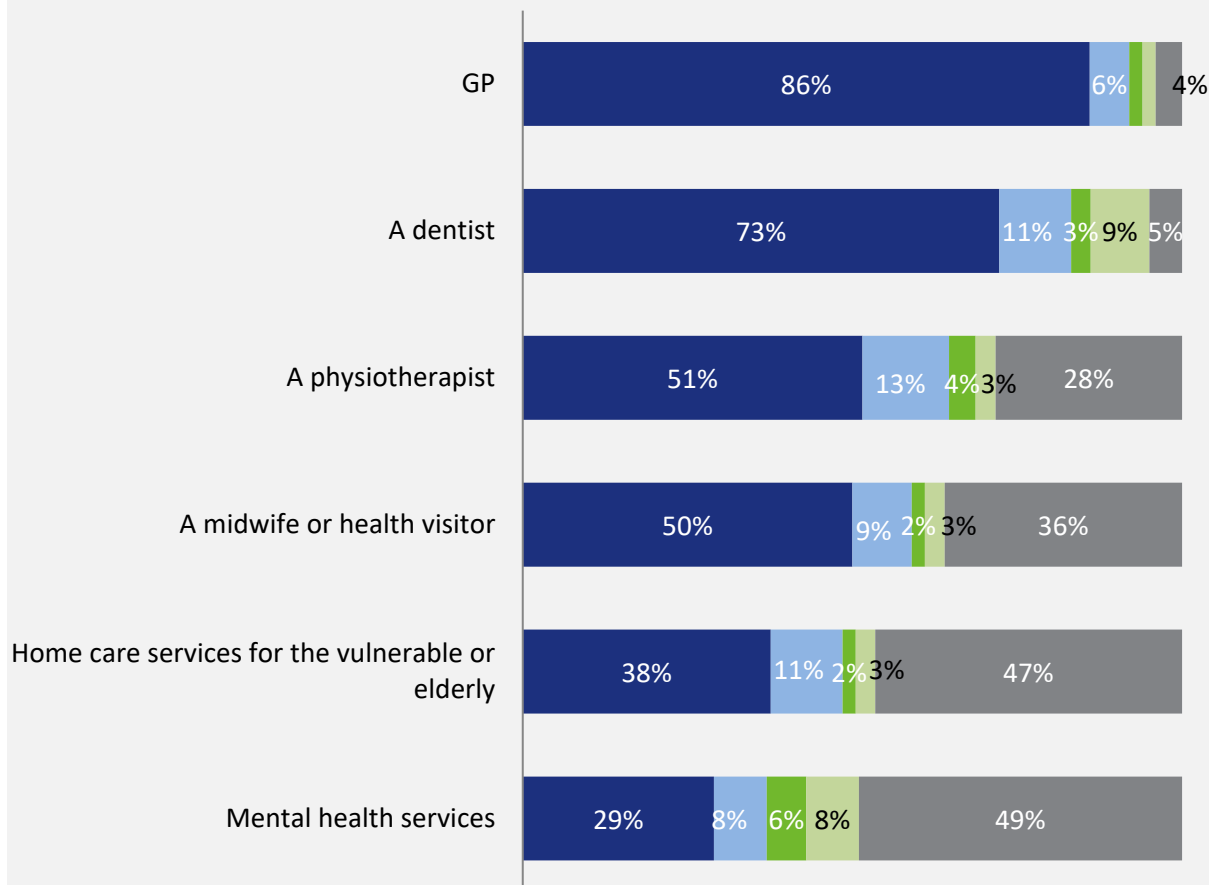
Dissatisfaction with bus frequency (37% dissatisfied), reliability (36%) and cost (31%) is higher than in the region overall (31%, 22% and 24%).

Levels of satisfaction with the cost of air services (36% satisfied) are higher than in the region overall (28%), while fewer are dissatisfied with the reliability of air services (12% vs 17%).

Relative to the region overall, dissatisfaction with the cost of ferry services is lower (22% vs 34%), as is satisfaction with the frequency of ferries (41% vs 52%).

Q. For each of the following health and care services, please indicate which best describes their availability within your local area?

- This service is permanently located within a 20-minute drive of my local area
- A visiting service is available within a 20-minute drive of my local area
- This service can be accessed online, but it is not available within a 20-minute drive of my local area
- This service cannot be accessed either online or within a 20-minute drive of my local area
- Don't know



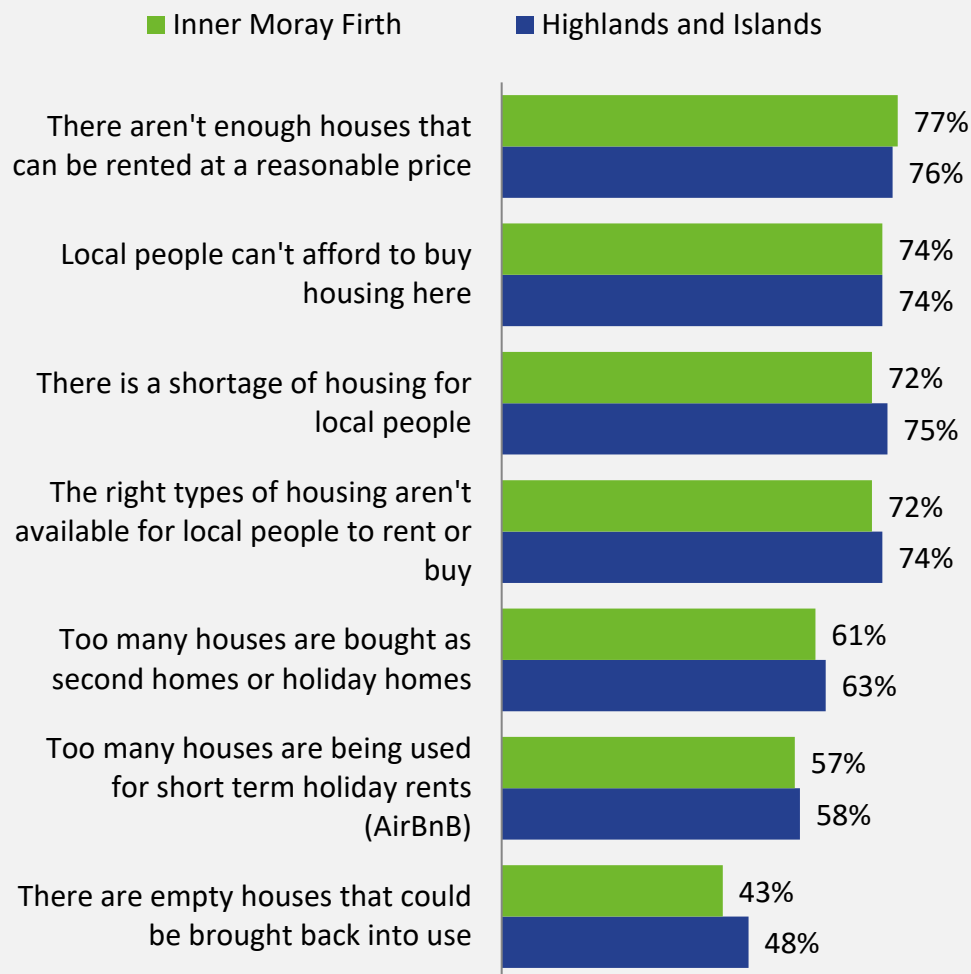
Base: All households in the Inner Moray Firth (1,413); fieldwork = 28 January – 25 March 2022

HOUSING SITUATION

Nine in 10 households in the Inner Moray Firth say their housing situation meets their needs well (in line with the region overall – both 90%). Just under half (47%) say their home is expensive to heat and 14% that it is difficult to heat, although this is slightly lower than the proportions citing these issues regionally. Households in the area are less likely to say that there are empty properties that could be brought back into use than in the region overall.

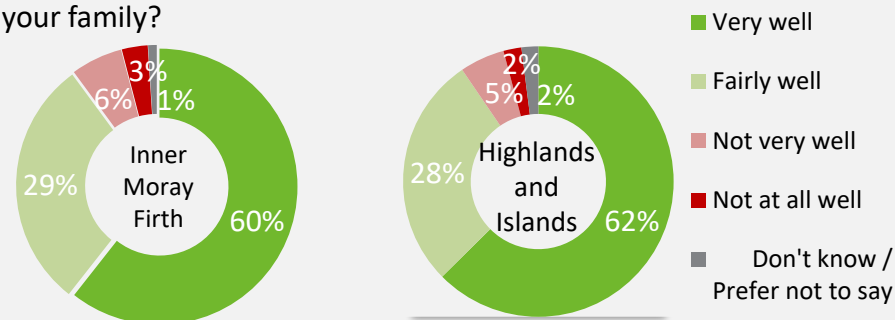
Q. To what extent does each of these describe the housing situation in your local area?

(% Describes what is happening in local area very well/at least somewhat)



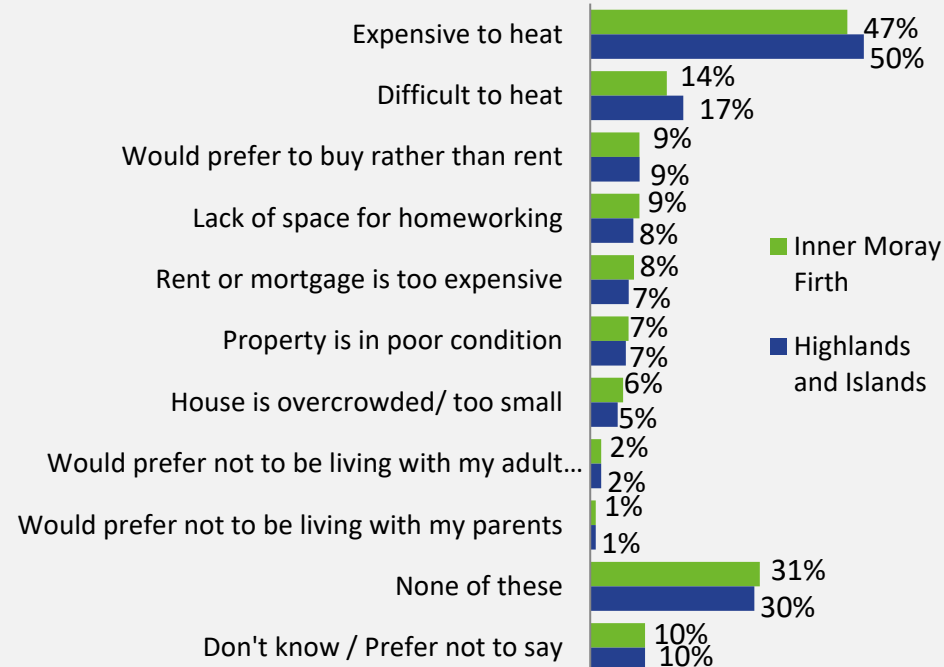
Base: All households in the Inner Moray Firth (1,413); fieldwork = 28 January - 25 March 2022

Q. How well does your current housing situation meet the needs of you and your family?



Base: All households in the Inner Moray Firth (1,413) and in Highlands and Islands (4,442); fieldwork = 28 January – 25 March 2022

Q. Which if any of the following apply to your current housing situation?



Base: All households in the Inner Moray Firth (1,413) and in Highlands and Islands (4,442); fieldwork = 28 January – 25 March 2022

EMPLOYMENT, ENTREPRENEURSHIP AND TRAINING

Just under a fifth (17%) of those in work are self-employed and 11% would like to start their own business. Almost two thirds (64%) of Inner Moray Firth residents in work say they are happy in their current job, and 22% would like to have a job that helps the environment or prevents climate change. These findings are in line with the region overall.

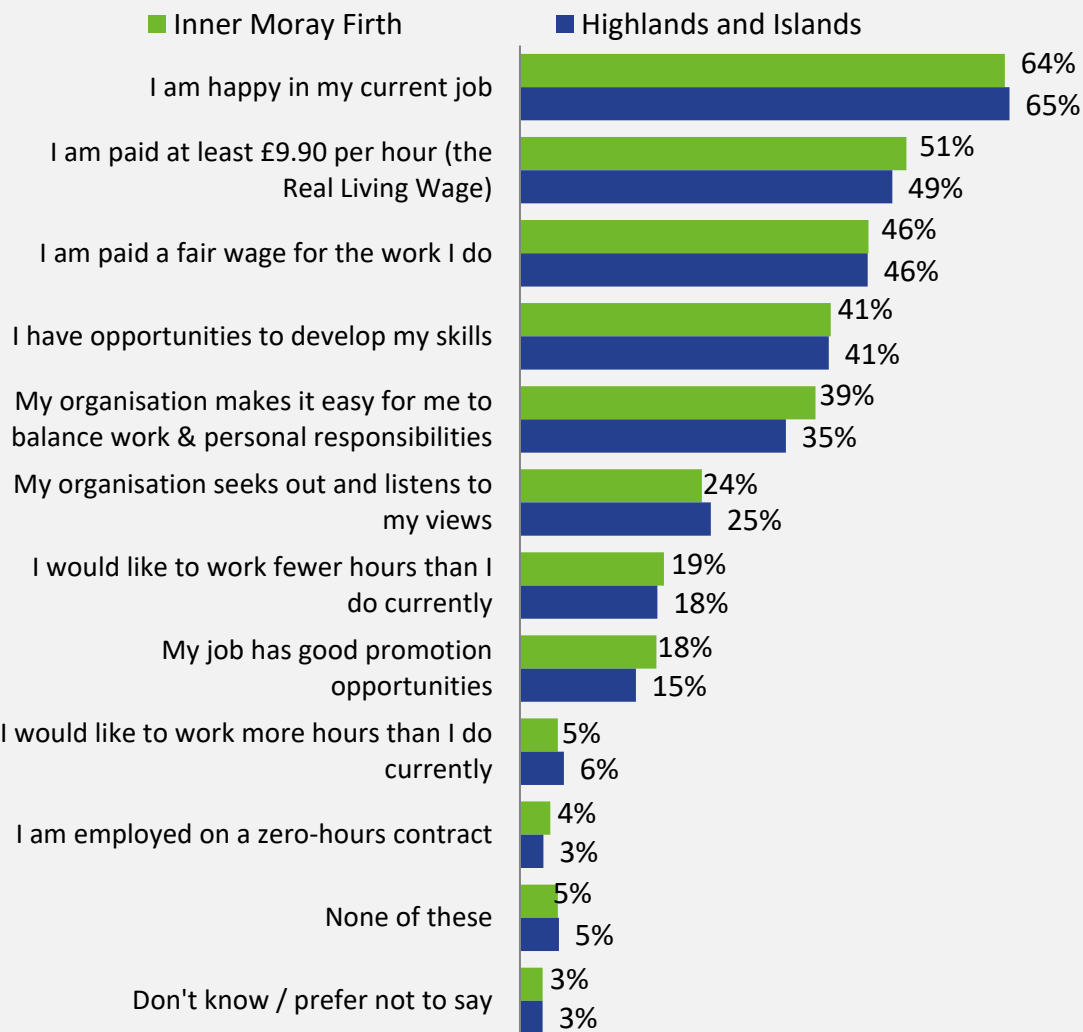
48% work in the private sector
(similar to the region overall at 49%)

43% work in the public sector
(similar to the region overall at 42%)

6% work for a charity/voluntary organisation
(in line with the region overall at 6%)

17% are self-employed
(similar to the region overall at 19%)

Q. Which if any of the following would you say apply to you in your current job?



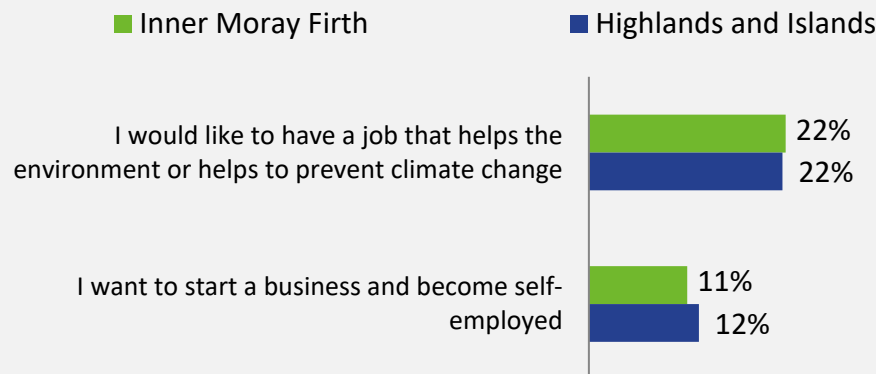
Base: All in work, aged 16+ in the Inner Moray Firth (669) and Highlands and Islands (2,240); fieldwork = 28 January - 25 March 2022

11% of those in work do more than one job, similar to the region overall at 13%.

11% of those aged 65+ are still in work, similar to the region overall at 13%.

Work aspirations are in line with the region overall.

Q. Thinking about your working situation over the next five years, which of these apply to you, if any?



Base: all who are employees, looking for work or studying, aged 16+ in the Inner Moray Firth (669) and Highlands and Islands (2,031); fieldwork = 28 January - 25 March 2022

49% of those in work say that their job would be affected by the need to reduce carbon emissions, in line with the region overall (46%).

24% of those who have not accessed training in the Inner Moray Firth say they find it difficult to access courses or training in person, lower than in the region overall (30%) and 8% find it difficult to do so online (9% regionally). The main barriers to accessing training are: the cost not being affordable (26%), having to spend time away from home (24%) and the course of interest not being available (22%).

IMPACT OF COVID-19 ON ACCESSING GOODS AND SERVICES

There is consensus among residents in the Inner Moray Firth that it is more expensive to buy goods and services now than it was pre-pandemic, with 90% saying this is the case in their local area, in line with the region overall. 61% of households also say that businesses that closed because of lockdown haven't reopened, which is higher than regionally. However, fewer say that community events have been cancelled and haven't restarted, and that increased numbers of tourists have made it hard for local people to access ferry or air services, compared with the region overall.



90% of households say it is more expensive to buy goods and services now than it was before the pandemic, in line with the region overall (89%).



61% of households say some businesses that closed because of lockdown haven't reopened, higher than the region overall (56%).



67% say community events have been cancelled and haven't restarted, lower than the region overall (72%).



59% of households say it is more difficult to get hold of goods needed now than it was before the pandemic, in line with the region overall (61%).



65% of households say people are supporting local businesses more than they used to, in line with the region overall (67%).



44% say people have been moving to live here because they can work from home, in line with the region overall (45%).



64% of households say it has been more difficult to get tradespeople to do work around their houses, similar to the region overall (67%).




23% of households say increased numbers of tourists have made it hard for local people to access ferry or air services, lower than the region overall (34%).

PARTICIPATION, PRIDE AND LOCAL DECISION MAKING

Just over half (52%) of residents in the Inner Moray Firth take part in activities in their local community, slightly lower than in the region overall (55%). Most commonly these are attending local community events, local groups or sports clubs or volunteering for a charity, social enterprise or community group.


There is scope to improve feelings of influence over local decision making. Residents are split on the extent of their influence which reflects the regional picture.

Participation

 **33%** ATTEND LOCAL COMMUNITY EVENTS
lower than in the region overall (39%)

 **29%** ARE MEMBERS OF LOCAL GROUPS OR SPORTS CLUBS


 **20%** VOLUNTEER

 **8%** ARE BOARD MEMBERS
lower than the region overall (11%)

Pride

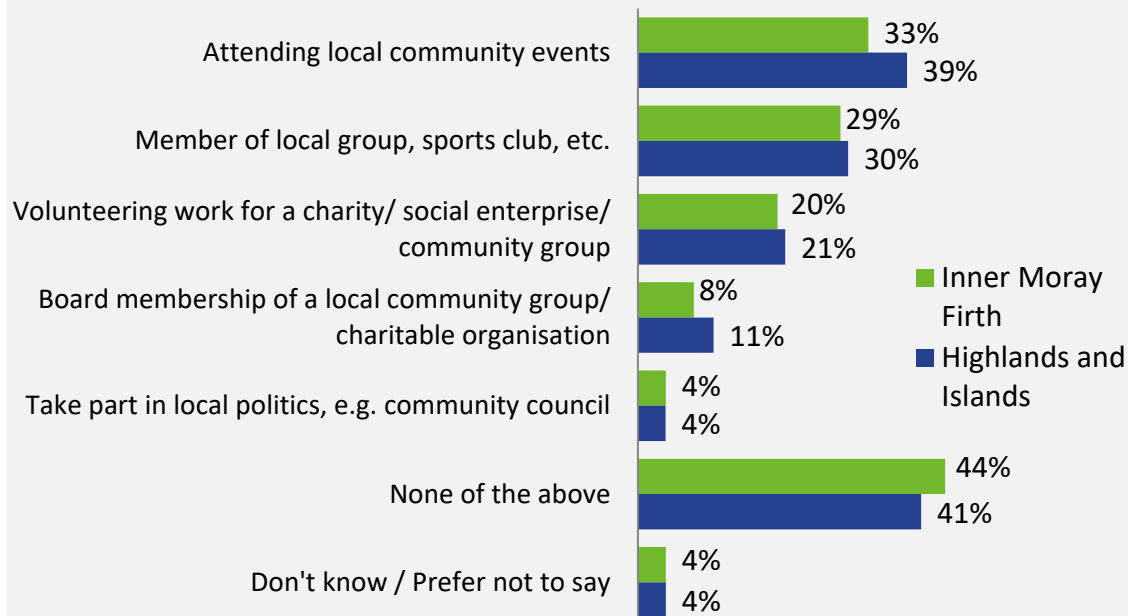
85% ARE PROUD TO LIVE IN THEIR LOCAL AREA
lower than in the region overall (88%)

Local decision making

 **28%** AGREE THAT LOCAL PEOPLE CAN INFLUENCE DECISION MAKING IN THEIR LOCAL AREA

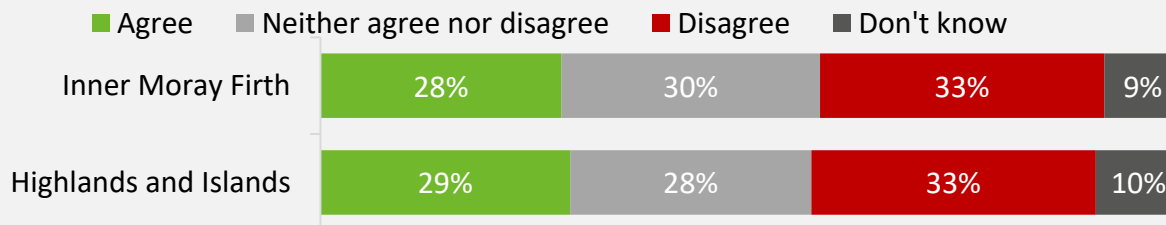
33% DISAGREE

Q: Which of the following do you personally participate in as part of your community, if any?



Base: All residents, aged 16+ in the Inner Moray Firth (1,719) and Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

Q: To what extent would you agree or disagree that local people are able to influence decisions made about your local area?



Base: All residents, aged 16+ in the Inner Moray Firth (1,719) and Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

TOWARDS NET ZERO – ENERGY SOURCES AND ELECTRIC VEHICLES

Among households in the Inner Moray Firth, the most commonly used energy sources for heating homes are mains gas, electricity and wood/biomass. Mains gas use is higher than it is across the Highlands and Islands overall (45% vs 33%), reflecting the varied levels of access to the gas grid across the region. Solar panels (6%) and air source heat pumps (5%) are the most used green technologies for home heating, although at low levels, in line with the region overall.

Dwelling types

Households in the Inner Moray Firth are most likely to live in a detached (45%) or semi-detached house (28%). Only 1% of households live in a house with a working croft, compared to 3% in the region overall.

Electric cars

7% of households in the Inner Moray Firth own or lease an electric or hybrid car and 6% plan to buy or lease one, in line with the region overall (7% and 6% respectively). A quarter (25%) have thought about buying an electric/hybrid car and decided against it, and a further quarter (25%) have not yet made a decision (compared to 26% and 24% regionally).

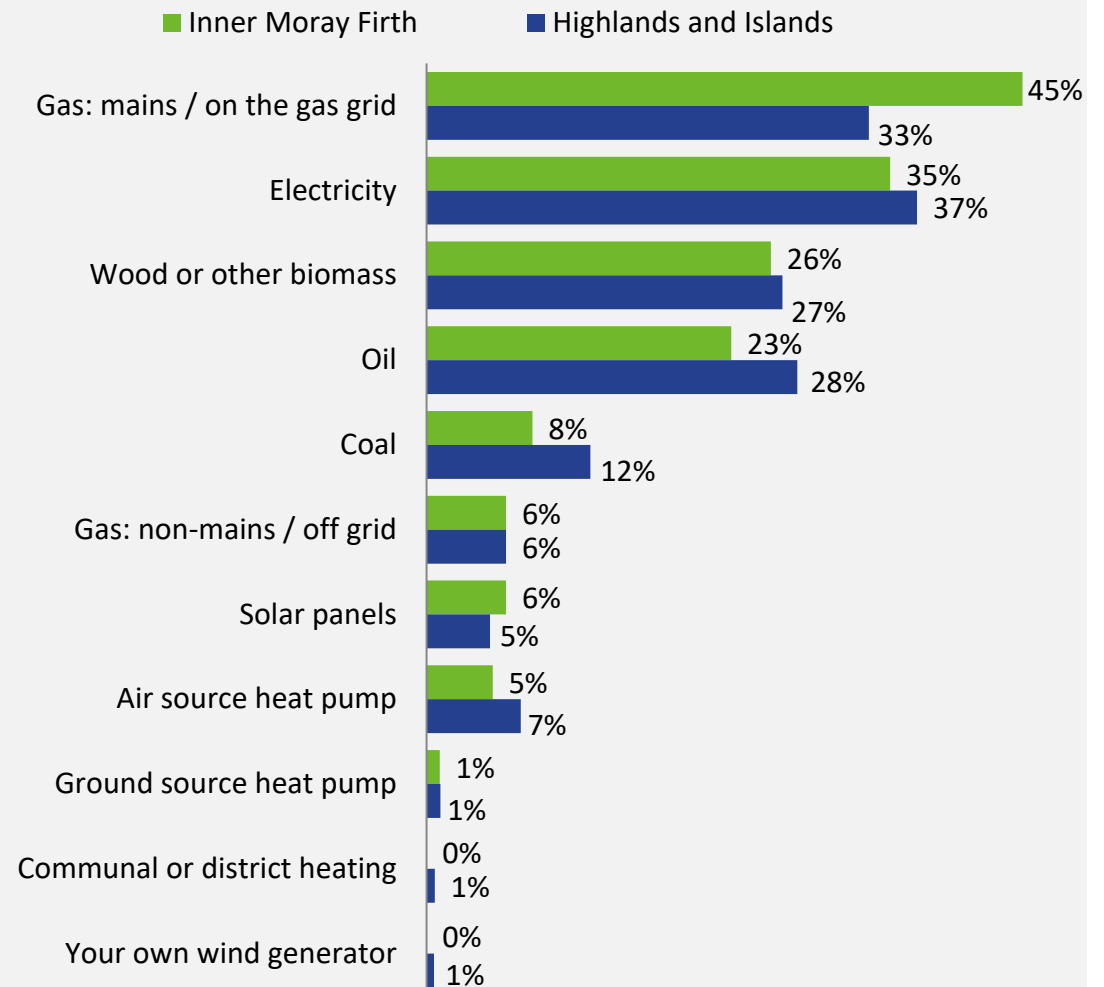
Consistent with the region overall, cost (86%), range (81%) and availability of public charging points (77%) are key concerns that need addressing in relation to owning or leasing an electric or hybrid car (85%, 80% and 76% respectively regionally).

60% of households would find it difficult to charge an electric vehicle on the street or at a car park, in line with the region overall (57%).

NOTES

In this report, green technology refers to air/ground source heat pumps, solar panels and wind generators.

Q. Which of these types or sources of energy do you use to heat your home?



Base: All households in the Inner Moray Firth (1,413) and Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

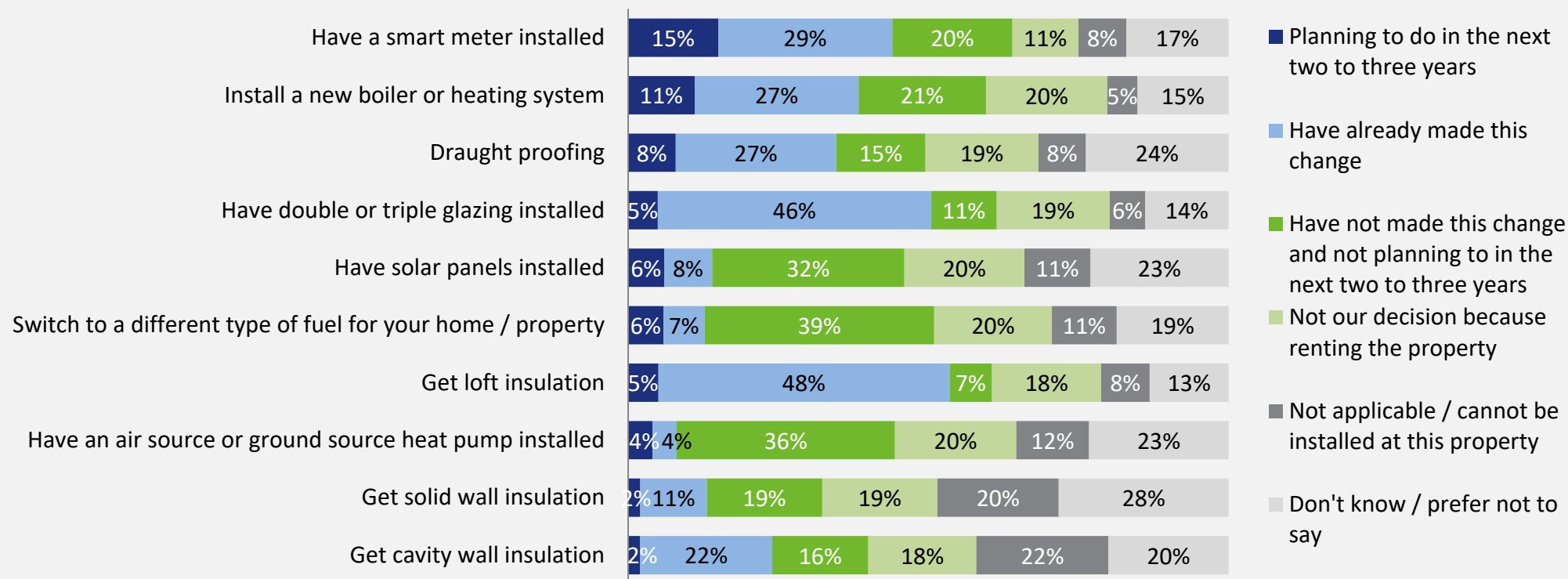
TOWARDS NET ZERO – ENERGY EFFICIENCY IMPROVEMENTS

A third of households (33%) in the Inner Moray Firth are planning to make energy efficiency improvements in the next two to three years. The most commonly planned actions are having a smart meter installed (15%), installing a new boiler/heating system (11%) and draught proofing (8%).

Among households who are not planning to switch fuel type, the main reasons are: because it is too expensive (55%), not wanting to change (33%) and there is not enough financial support (27%).

33% OF HOUSEHOLDS ARE PLANNING TO MAKE AT LEAST ONE ENERGY EFFICIENCY IMPROVEMENT IN THE NEXT TWO TO THREE YEARS, IN LINE WITH THE REGION OVERALL AT 36%

Q. Which of the following, if any, are you planning to do in the next two to three years?



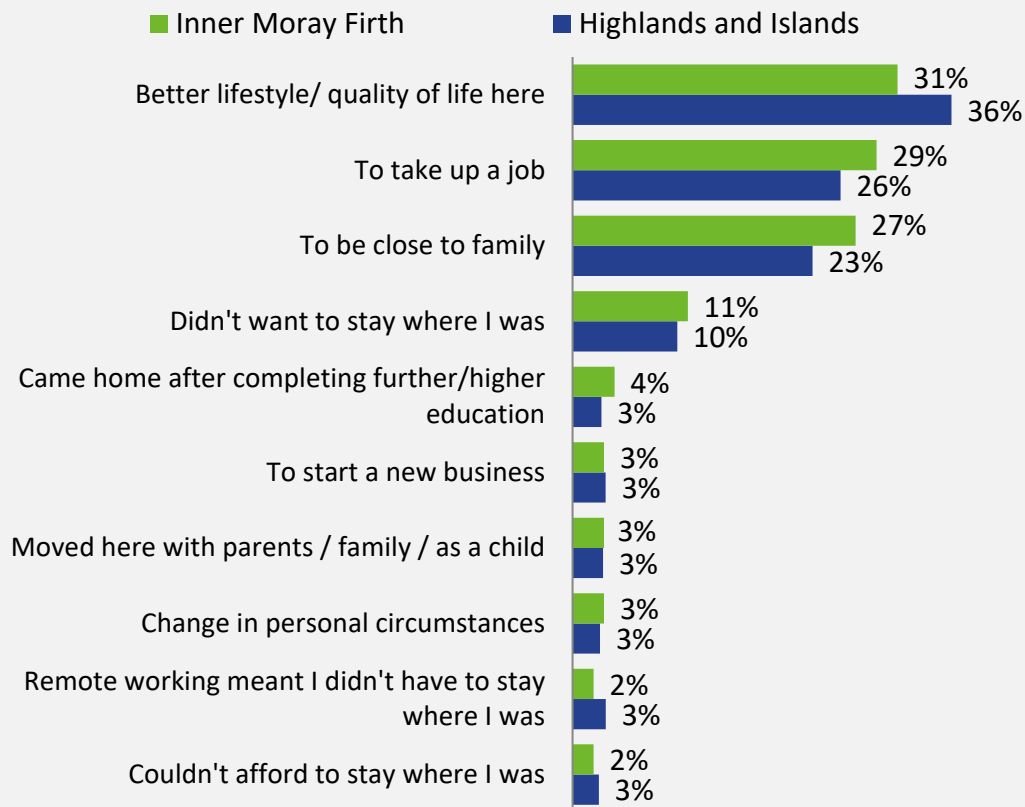
Base: All households in the Inner Moray Firth (1,413); fieldwork = 28 January - 25 March 2022

REASONS FOR MOVING TO THE AREA

Among residents in the Inner Moray Firth who have not always lived in the Highlands and Islands, the main reason for moving to the region was for a better quality of life. However, fewer mention this as a factor compared with the region overall. Other reasons include to take up a job (which is line with the average), or to be closer to family (which is higher than average).

Households in the Inner Moray Firth are more likely than those in the region overall to say people are moving to their local area for new job opportunities, and less likely to say that most of the people moving to their local area are retired, or that people are leaving because they can't find work.

Q: Why did you move to, or move back to, the Highlands and Islands?
[Top ten reasons]



Base: All residents who have not always lived in the Highlands and Islands, aged 16+ in the Inner Moray Firth (1,123) and in Highlands and Islands (3,449); fieldwork = 28 January - 25 March 2022

Among those in the Inner Moray Firth who have not always lived in the region:



31% say they moved to the region for a better lifestyle/quality of life, lower than the region overall



27% say they moved to be close to family, higher than the region overall

Among all households in the Inner Moray Firth:

48% say new businesses are starting up in their local area, in line with the region overall at 46%

47% say most of the people who move to their local area are retired, lower than the region overall at 56%

35% say people are leaving their local area because they can't find work, lower than the region overall at 47%

32% say more people are moving to their local area for new job opportunities, higher than regionally at 29%

PRIORITIES FOR COMMUNITIES TO THRIVE

The top priorities for communities in the Inner Moray Firth to thrive are: housing for local families, more job opportunities and local businesses and trades. However, fewer mention job opportunities as a priority than in the region overall.

Optimism

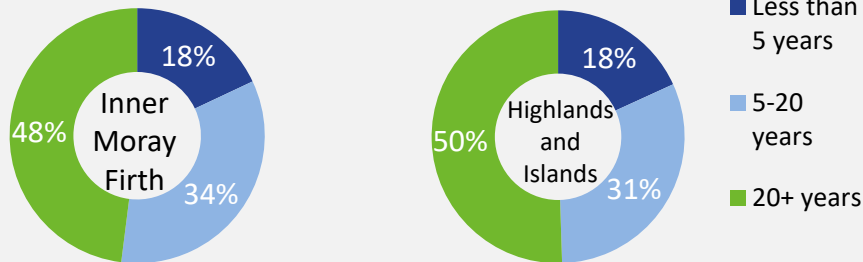
52% of residents in the Inner Moray Firth are optimistic about their community and 15% are pessimistic, in line with the region overall (52% and 16% respectively).

Length of residence and future intentions

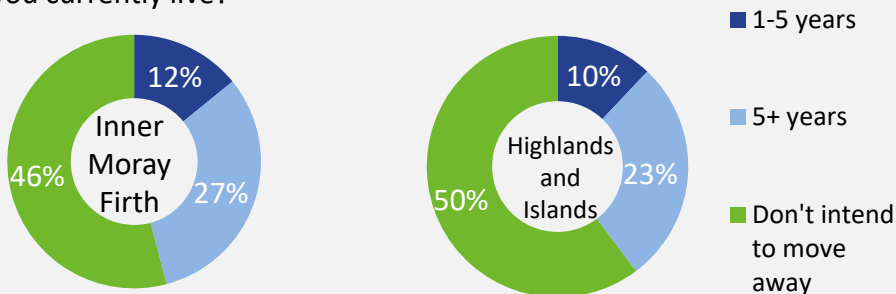
48% of residents have been living in their local area for more than 20 years, compared to 50% in the region overall. A third (34%) have lived in their local area for between 5 and 20 years (higher than regionally), and 18% for less than five years.

46% of residents don't intend ever to move away from their local area, lower than the region overall at 50%.

Q. How long have you lived in your local area?



Q. Which of these best describes how long you plan to stay in the local area where you currently live?

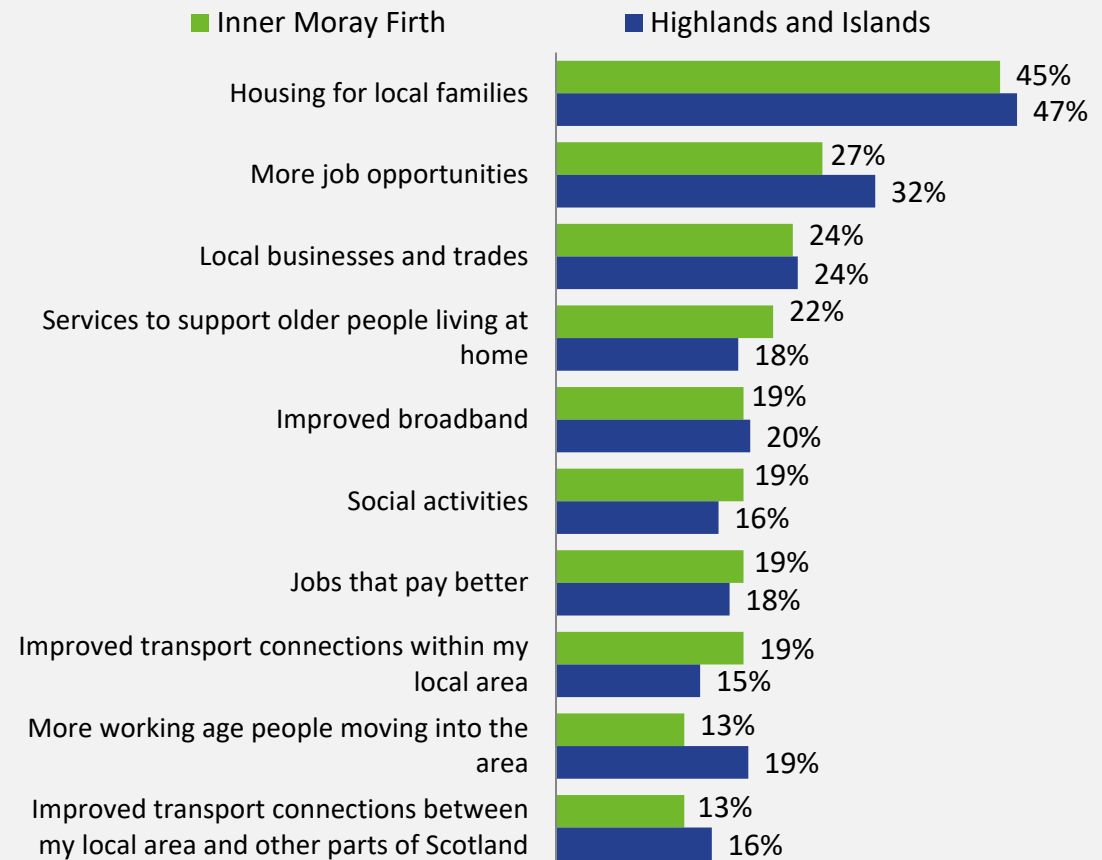


Base: All residents, aged 16+ in the Inner Moray Firth (1,719) and the Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

Priorities

Services to support older people living at home (22%), social activities (19%) and improved transport within the local area (19%) are higher priorities for communities in the Inner Moray Firth, compared to the region overall. More job opportunities (27%) and more working age people moving into the area (13%) are lower priorities.

Q. Which of these, if any, does your community need to thrive in the future? [top 10 responses]



Base: All residents, aged 16+ in the Inner Moray Firth (1,719) and Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

METHODOLOGY

Sampling

In total 18,087 households were invited to take part in the survey. These were randomly selected from the Royal Mail's Postcode Address File (PAF) from among all households based in the eight HIE regional office areas. Households were disproportionately sampled in Caithness and Sutherland, Inness Gall, Orkney and Shetland, to allow for a large enough sample size in these areas to carry out subgroup analysis.

Method

The survey was carried out using a push-to-web methodology. Residents were able to complete the survey online or using a paper questionnaire. Each address on the sample was sent up to three letters, inviting them to take part in the survey:

- The first letter invited participants to take part in an online survey, using a supplied website link and two unique access codes. Up to two members of the household were invited to take part in the online survey.
- Two weeks later a reminder postcard, containing the online survey link and access code, was sent to those households yet to respond.
- In another two weeks a final letter was sent to those households yet to respond which, along with the invite to the online survey, also contained one copy of a paper version of the survey and a postage paid return envelope.

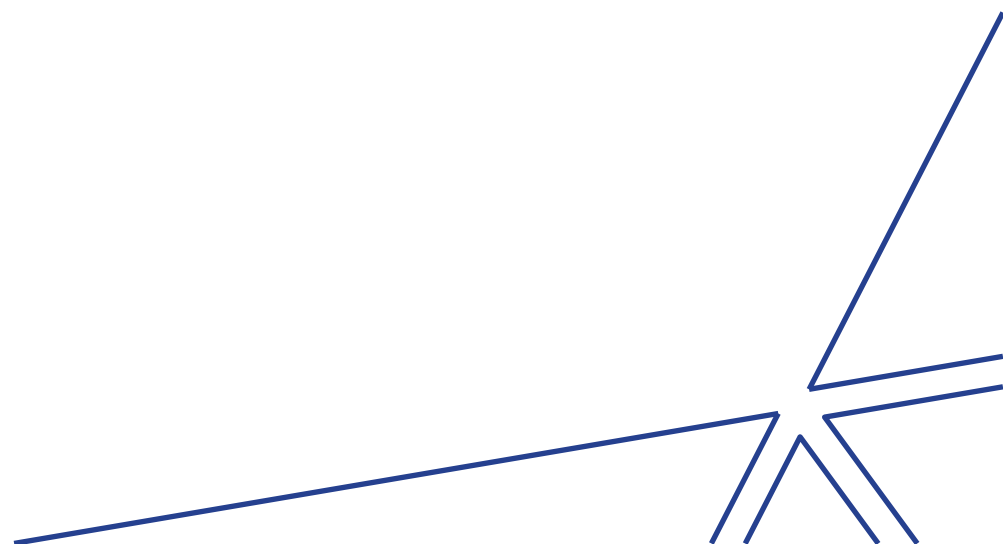
All residents who completed the survey were offered a £5 shopping voucher to thank them for their time.

Fieldwork

The survey fieldwork was conducted between 28 January and 25 March 2022. In total 5,301 eligible interviews were achieved (3,322 online and 1,979 postal surveys) – a response rate of 28%.

In the Inner Moray Firth, 1,719 interviews were achieved.

Weighting was applied to correct the distribution of the sample to more closely match the overall Highlands and Islands population. The data was weighted by age, gender, working status, number of adults in household, tenure and area of the region using National Records of Scotland Mid-2020 Population Estimates and Scottish Household Survey 2019 data.



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