

MY LIFE IN THE HIGHLANDS AND ISLANDS RESEARCH

Moray

Summary report

September 2022



Highlands and Islands Enterprise
Iomairt na Gàidhealtachd 's nan Eilean

EXECUTIVE SUMMARY - MORAY

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 872 in Moray.

Connectivity and access to services

Households in Moray are generally more likely to be able to access services in their local area, such as a primary school (82%), a secondary school (60%), a hall/function room (74%), a convenience store (77%), a supermarket (53%), an evening bus service (48%), and a recycling centre (48%), compared to households in the Highlands and Islands region overall. However, 61% do not have access to a cottage or community hospital, 49% a recycling centre and 47% a bank/mobile bank within their local area.

Households in Moray are more likely to be able to access key health services than those in the region overall. Of those who know about service availability, the majority can access a GP (99%), midwife/health visitor (98%), homecare services (96%), a physiotherapist (93%), a dentist (92%), or mental health services (90%) within a 20-minute drive or online.

Residents in Moray are more likely to find it easy to withdraw money (75%) or have a takeaway delivered (64%) than regionally (70% and 50%). One in five households in Moray (19%) find it difficult to stream a TV programme or feature film online.

Housing

Most households in Moray feel their own housing situation meets their needs. Despite this, 42% say their home is expensive to heat and 13% that it is difficult to heat (lower than the region overall – 50% and 17%). Households in Moray are less likely than average to report housing issues in their local area, although more than three fifths still say the right types of housing aren't available for locals (64%), there is a lack of houses to rent at a reasonable price (64%), there is a shortage of housing (61%), and that locals can't afford housing (60%).

Employment and training

Around one in ten (12%) of those in work in Moray have more than one job, in line with the regional average (13%). Fewer than in the region overall are self-employed (14% vs 19%), while 11% would like to start their own business (12% regionally).

Around one in five (17%) of those in Moray who have not accessed training say they find it difficult to access courses or training in person, fewer than the Highlands and Islands overall (30%).

Impact of Covid-19 and transport

The pandemic has impacted on people's access to goods and services in Moray: 86% say goods and services are more expensive in their local area now than pre-pandemic. Residents are more likely than average to say that businesses closed because of lockdown haven't reopened (63% vs 56%).

87% of residents in Moray rely on cars/vans, 18% on buses and 13% on trains, in line with the region overall. Levels of satisfaction with bus reliability and frequency are higher than average, but fewer in Moray are satisfied with the cost of train services (57% dissatisfied).

Participation, pride and local decision making

Half (51%) of residents in Moray take part in activities in their local community, slightly lower than regionally (55%). Most commonly these are attending local community events, local groups or sports clubs or volunteering.

84% of residents express pride in their local community (88% regionally). However, they are split about whether local people can influence local decision-making, although fewer disagree than regionally (28% vs 33%).

Towards net zero

34% of households in Moray are planning to make energy efficiency improvements in the next two to three years, most commonly installing a smart meter (14%), a new boiler/heating system (11%) and/or draught proofing (9%).

45% of those in work in Moray say that their job would be affected by the need to reduce carbon emissions, in line with the region overall (46%).

Priorities for communities to thrive

Residents in Moray are more likely than average to be pessimistic about their community (13% vs 16% regionally), although around half are optimistic (49%). The top priorities for communities in Moray to thrive are: more job opportunities, housing for local families, and local businesses and trades. Local businesses and trades (30%) is a higher priority, while housing for local families (32%) and more working age people moving into the area (14%) are lower priorities, relative to the region overall (24%, 47% and 19% respectively).

ACCESS TO FACILITIES AND SERVICES (1)

Most households in Moray (82%) have a primary school available within a 15-20 minute walk of their home, and around three quarters have a convenience store (77%), a daytime bus (76%), a hall/function room that can be rented (74%) and a post office (73%) available within this distance. However other key services and facilities are less accessible. For example, 61% do not have access to a cottage or community hospital, 49% a recycling centre, 47% a bank/mobile bank and 45% a supermarket within their local area.

19% OF HOUSEHOLDS SAY IT IS DIFFICULT TO STREAM A TV PROGRAMME OR FILM in line with the region overall (21%)

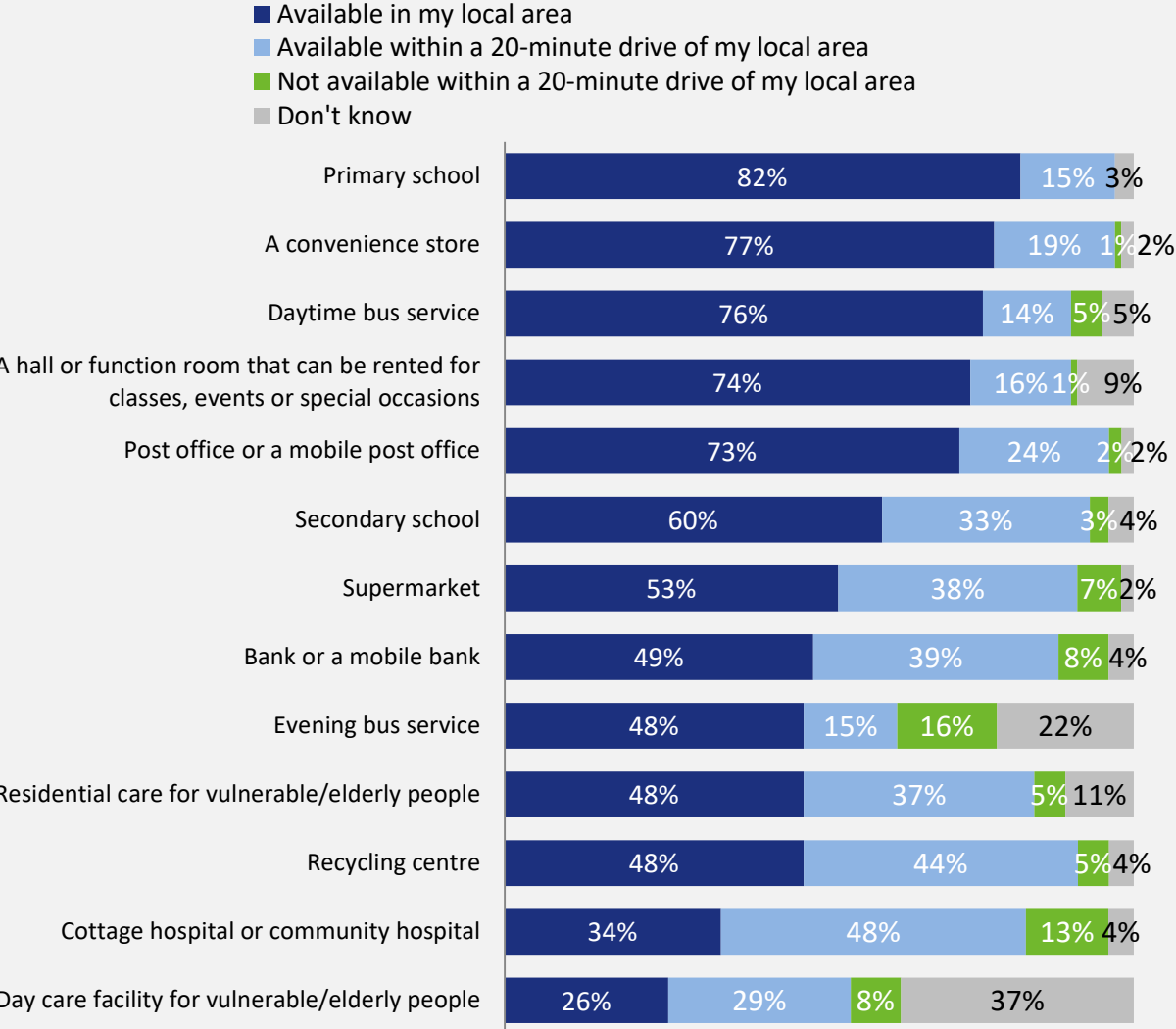
75% OF HOUSEHOLDS SAY IT IS EASY TO WITHDRAW MONEY FROM A CASH MACHINE, higher than in the region overall (70%)

64% OF HOUSEHOLDS SAY IT IS EASY TO HAVE A TAKEAWAY DELIVERED higher than in the region overall (50%)

Households in Moray are more likely to say they can access certain services within their local area, compared to the Highlands and Islands overall:

- a **primary school** (82% vs 77%)
- a **secondary school** (60% vs 51%)
- a **hall/function room that can be rented** (74% vs 70%)
- a **convenience store** (77% vs 74%)
- a **supermarket** (53% vs 47%)
- an **evening bus service** (48% vs 43%), and
- a **recycling centre** (48% vs 41%)

Q. For each of the following facilities or services, please indicate whether each is currently available within your local area or within a 20-minute drive of your local area. By local area we mean the area within a 15-20 minute walk from your home.



Base: All households in Moray (736); fieldwork = 28 January – 25 March 2022

ACCESS TO FACILITIES AND SERVICES (2)

A majority of households in Moray have access to a GP (87%) and a dentist (75%) permanently located within a 20-minute drive of their local area. Around three in five say they can access a permanent or a visiting physiotherapist (63%) and a midwife or health visitor (61%). 38% say they can access mental health services either in person or online, while 51% don't know.

Excluding those who don't know whether the service is available locally, **access to health services (either within a 20-minute drive or online) is higher among households in Moray than across the region overall:**

- GP (99% vs 97%)
- midwife or health visitor (98% vs 95%)
- home care services (96% vs 94%)
- physiotherapist (93% vs 89%)
- dental services (92% vs 85%)
- mental health services (90% vs 80%).

Reliance on and satisfaction with transport services

The majority of households own at least one vehicle (90%), with almost half (46%) owning two or more (in line with the region overall at 87% and 44% respectively).

- 87% rely on a car or van, in line with the region overall at 87%
- 18% rely on buses, in line with the region overall at 20%
- 13% rely on trains, in line with the region overall at 12%
- 11% rely on air transport, lower than regionally at 17%
- 2% rely on ferries, lower than in the region overall at 23%

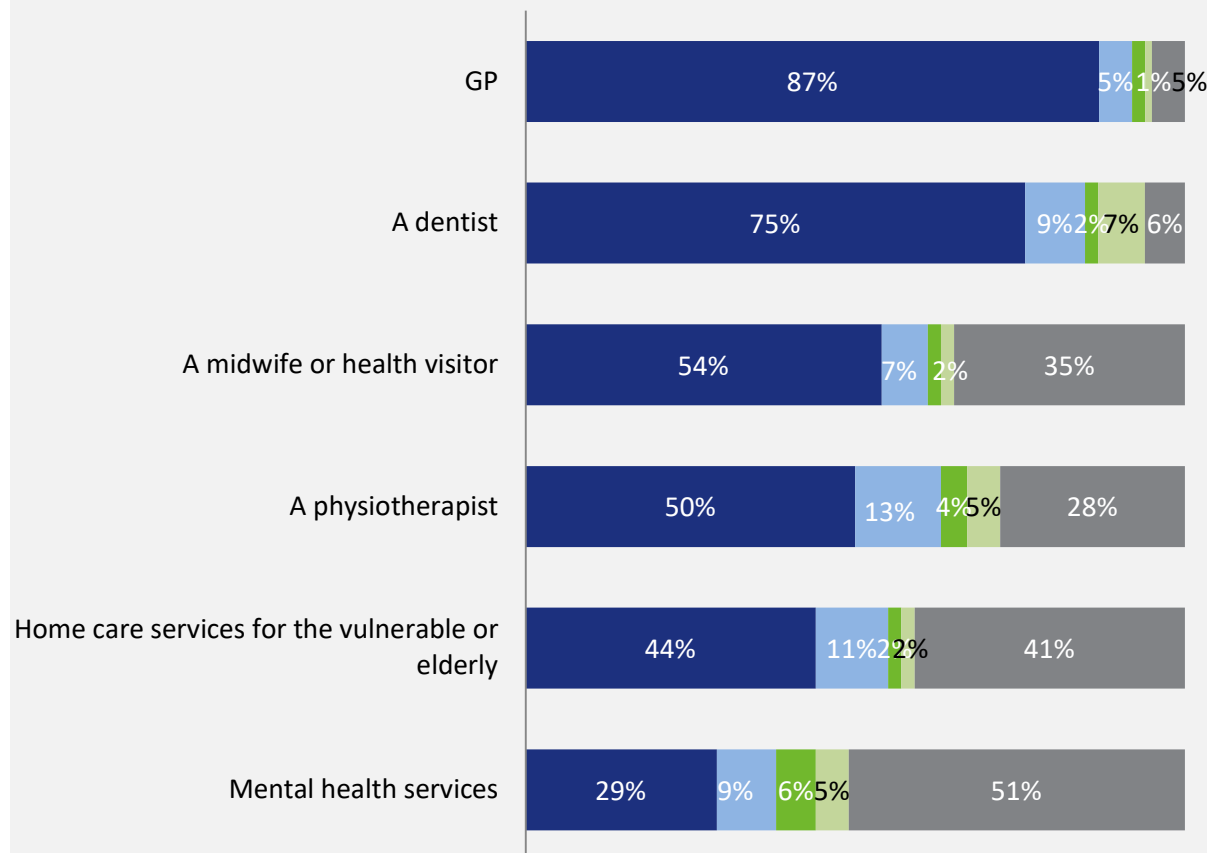
Satisfaction with bus reliability (59% satisfied) and frequency (55%) is higher than in the region overall (52% and 47%).

Levels of satisfaction with the cost of train services (16% satisfied) are lower than in the region overall (21%), with more than half being dissatisfied (57%).

More are satisfied with the cost of air services than in the region overall (34% vs 28%), while fewer express dissatisfaction with the reliability of air services (11% vs 17%).

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



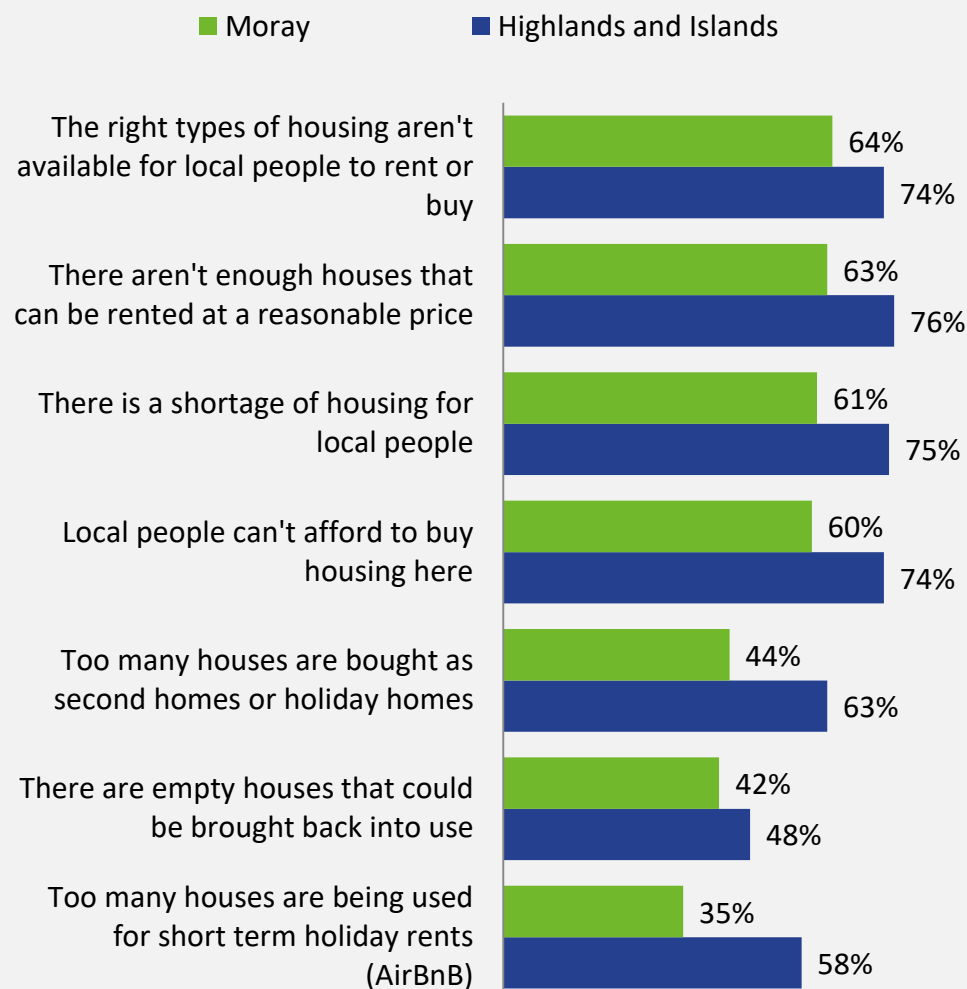
Base: All households in Moray (736); fieldwork = 28 January – 25 March 2022

HOUSING SITUATION

Most households in Moray (91%) say their housing situation meets their needs well (90% regionally). Despite this, 42% say their home is expensive to heat and 13% that it is difficult to heat (both lower than for the region overall – 50% and 17% respectively). Households in Moray are less likely than average to report any of the issues listed below about housing in their local area, although around six in ten households do report concerns related to the availability and affordability of housing locally.

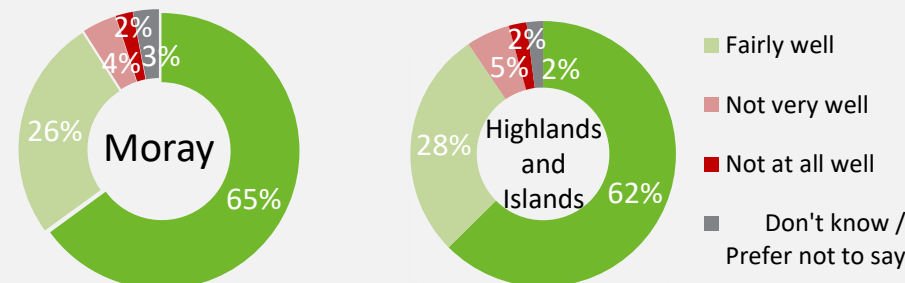
Q. To what extent does each of these describe the housing situation in your local area?

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



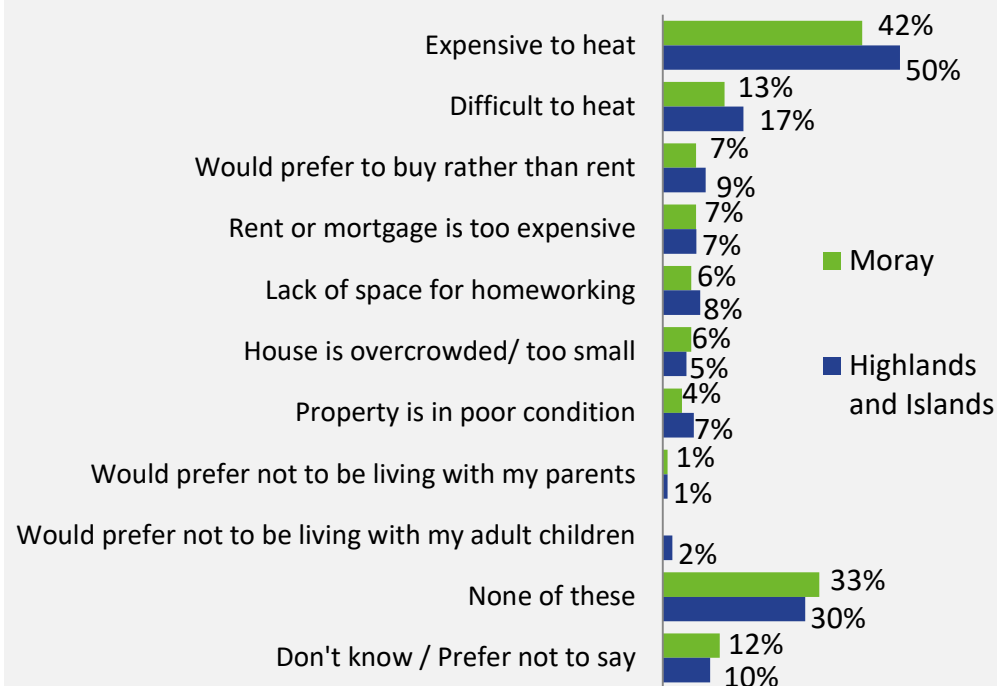
Base: All households in Moray (736); fieldwork = 28 January - 25 March 2022

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



Base: All households in Moray (736) 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 Moray (736) and in Highlands and Islands (4,442); fieldwork = 28 January – 25 March 2022

EMPLOYMENT, ENTREPRENEURSHIP AND TRAINING

Fewer of those in work in Moray are self-employed than regionally (14% compared with 19%), and just over one in ten would like to start their own business. In line with regionally, 67% of those in work say they are happy in their current job. Regarding training opportunities, fewer in Moray say they find it difficult to access courses or training in person compared to the Highlands and Islands overall.

49% work in the private sector

(in line with the region overall at 49%)

45% work in the public sector

(similar to the region overall at 42%)

4% work for a charity/voluntary organisation

(in line with the region overall at 6%)

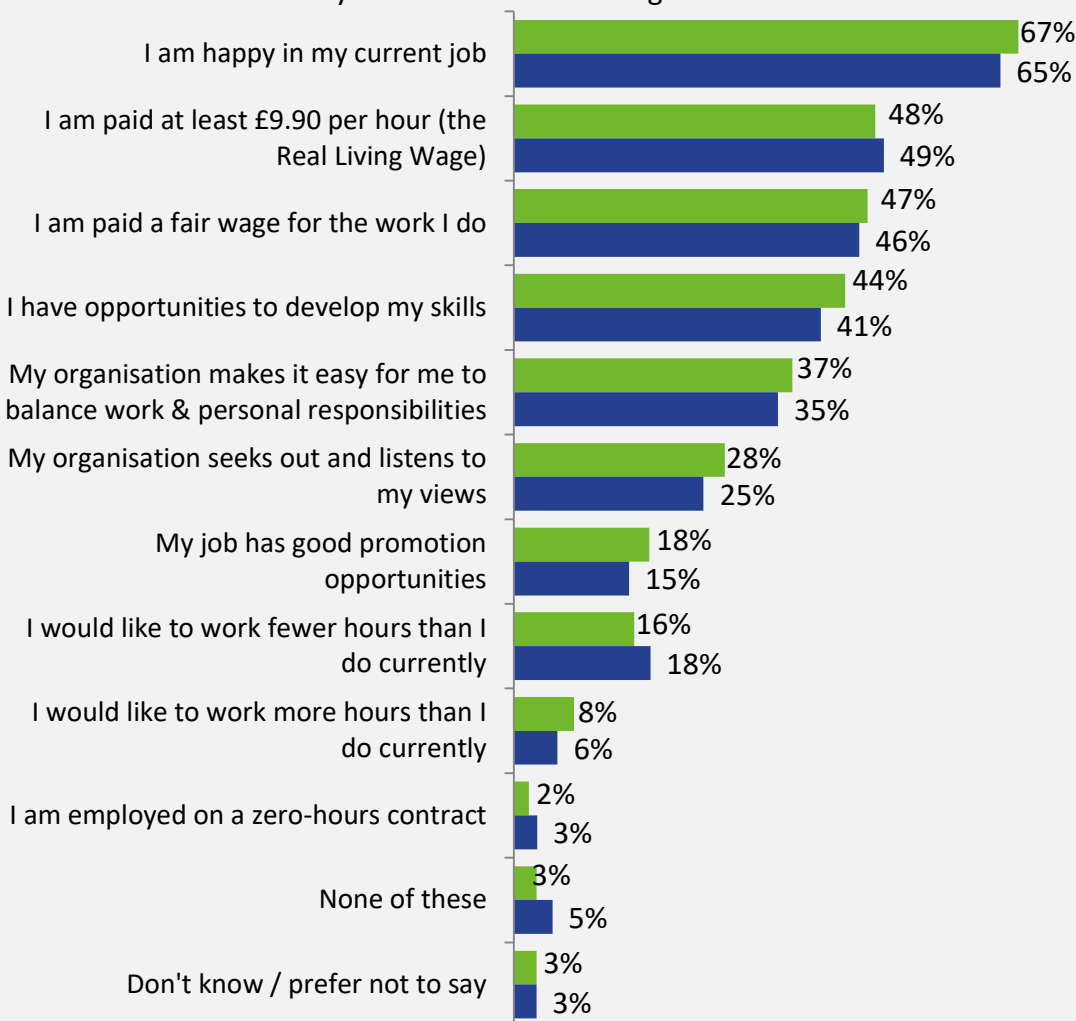
14% are self-employed

(similar to the region overall at 19%)

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

■ Moray

■ Highlands and Islands



Base: all in work, aged 16+ in Moray (396) and Highlands and Islands (2,240); fieldwork = 28 January - 25 March 2022

12% of those in work in Moray do more than one job, in line with the region overall at 13%.

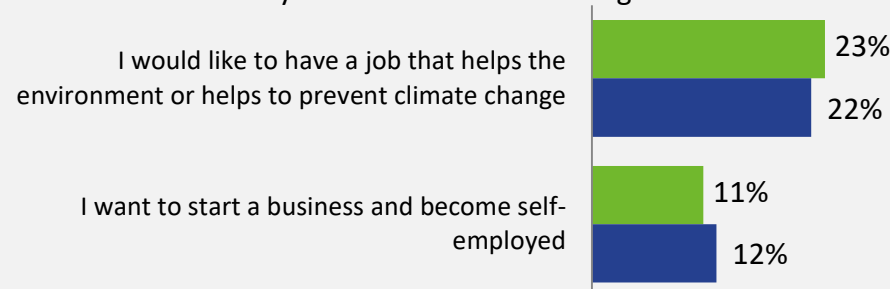
10% of those aged 65+ are still in work, similar to the region overall at 13%.

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?

■ Moray

■ Highlands and Islands



Base: all who are employees, looking for work or studying, aged 16+ in Moray (363) and Highlands and Islands (2,031); fieldwork = 28 January - 25 March 2022

45% 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%).

17% of those who have not accessed training in Moray say they find it difficult to access courses or training in person, lower than the region overall (30%) and 6% find it difficult to do so online (9% regionally). The main barriers to accessing training are: having to spend time away from home (32%), the broadband connection not being reliable enough (27%) and the cost not being affordable (25%).

IMPACT OF COVID-19 ON ACCESSING GOODS AND SERVICES

There is consensus among residents of Moray that it is more expensive to buy goods and services now than it was pre-pandemic, with 86% saying this is the case in their local area (in line with regionally) and a higher number than average say that businesses closed because of lockdown haven't reopened (63%). However, fewer than average say it has been more difficult to access tradespeople to do work around residents' houses (61%), that it is more difficult to get hold of goods needed now than it was before the pandemic (53%), that people have been moving to live here because they can work from home (33%), and that increased numbers of tourists have made it hard for local people to access ferry or air services (6%).



86% 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 it has been more difficult for households in Moray to get tradespeople to do work around residents' houses, lower than the region overall (67%).



69% say community events have been cancelled and haven't restarted, in line with the region overall (72%).



53% of households say it is more difficult to get hold of goods needed now than it was before the pandemic, lower than the region overall (61%).



64% of households say people are supporting local businesses more than they used to, in line with the region overall (67%).



33% say people have been moving to live here because they can work from home, lower than the region overall (45%).



63% of households say some businesses that closed because of lockdown haven't reopened, higher than the region overall (56%).



6% 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

Half (51%) of Moray residents report taking part in activities in their local community, 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, although levels of disagreement (at 28%) are lower than in the region overall (33%).

Participation

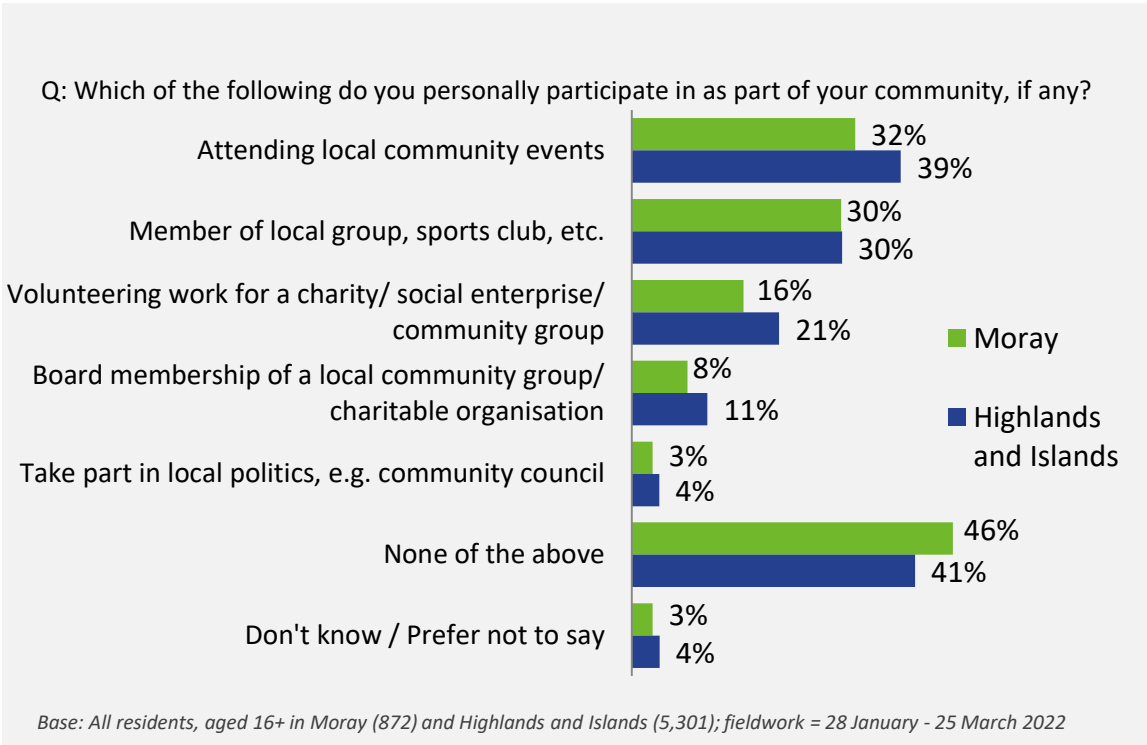
 **32%** ATTEND LOCAL COMMUNITY EVENTS, lower than the region overall (39%)

 **30%** ARE MEMBERS OF LOCAL GROUPS OR SPORTS CLUBS

 **16%** VOLUNTEER lower than the region overall (21%)

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

Pride
84% ARE PROUD TO LIVE IN MORAY lower than the region overall (88%), although still high

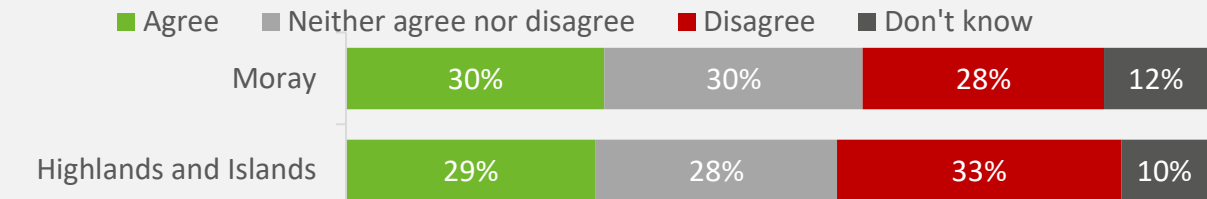


Local decision making

 **30%** AGREE THAT LOCAL PEOPLE CAN INFLUENCE DECISION MAKING IN THEIR LOCAL AREA

28% DISAGREE lower than the region overall (33%)

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



TOWARDS NET ZERO – ENERGY SOURCES AND ELECTRIC VEHICLES

The most commonly used energy sources for heating homes in Moray are gas, electricity and wood/other biomass. The use of gas in Moray is higher than in the Highlands and Islands overall, with varied levels of access to the gas grid across the rest of the region. Solar panels (4%) are the most used green technology for home heating, while air source heat pumps are less common in Moray than in the region overall. Relatively few households currently have, or plan to buy or lease an electric or hybrid car.



Dwelling types

Households in Moray are most likely to live in a detached house (44%), similar to the average regionally (47%). More households than in the regional overall live in a semi-detached house (30% compared to 26%).



Electric cars

8% of households in Moray own or have leased 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 or leasing an electric/hybrid car and decided against it, and 22% have not yet made a decision (26% and 24% regionally).

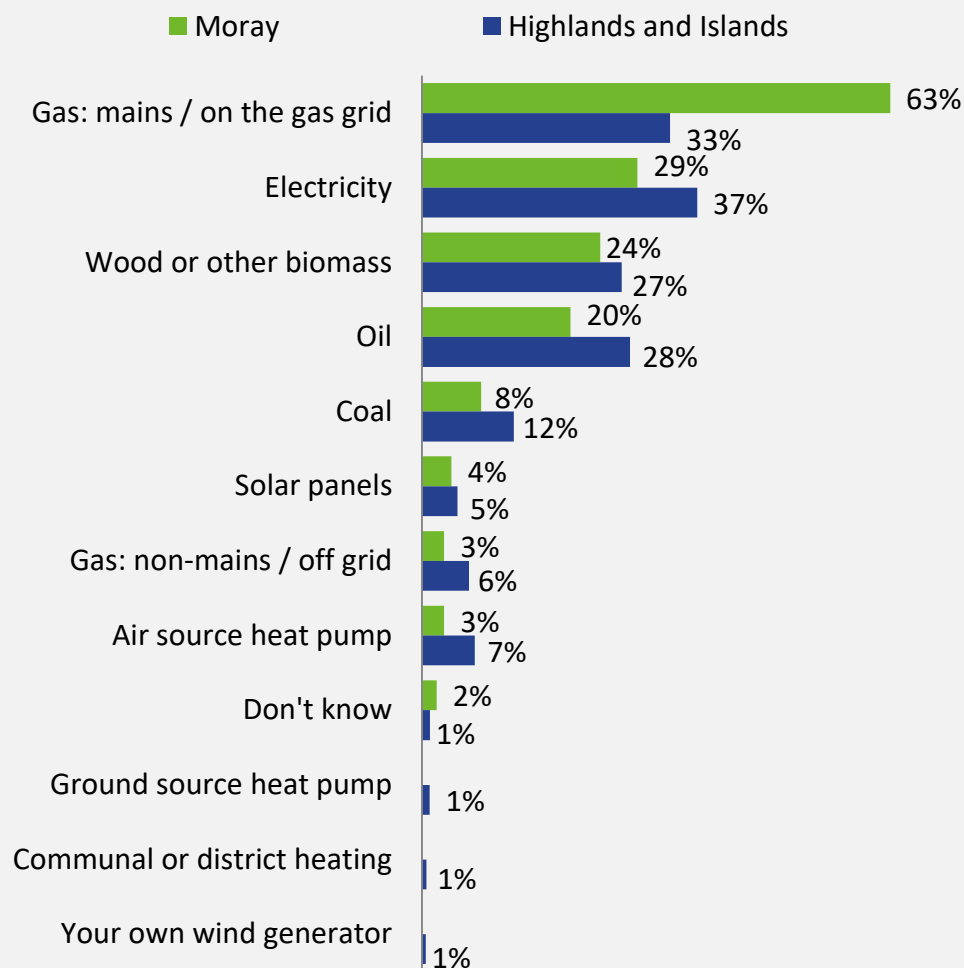
Consistent with the region overall, cost (83%), range (80%) and availability of public charging points (77%) are key concerns that need addressing in relation to buying or leasing an electric or hybrid car (85%, 80% and 76% respectively regionally).

28% of households would find it easy to charge an electric vehicle on-street or at a car park, and 55% would find it difficult, similar to the region overall (26% and 57% respectively).

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 Moray (736) and Highlands and Islands (4,442); fieldwork = 28 January - 25 March 2022

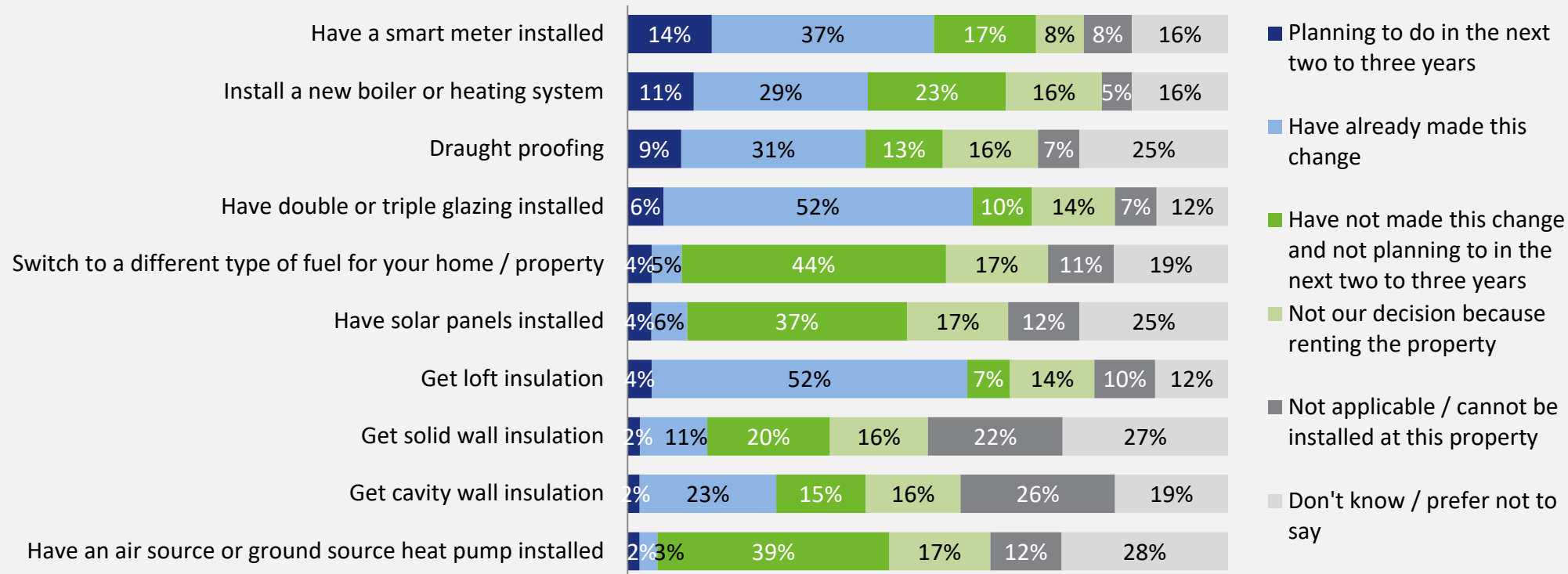
TOWARDS NET ZERO – ENERGY EFFICIENCY IMPROVEMENTS

About a third of households in Moray (34%) are planning to make energy efficiency improvements in the next two to three years, in line with the region overall (36%). The most commonly planned actions are having a smart meter installed (14%), installing a new boiler/heating system (11%) and/or draught proofing (9%). Households in Moray are less likely than average to be planning to have an air source or ground source heat pump installed (2% vs 4% overall).

Among households who are not planning to switch fuel type, the main reasons are: because it is too expensive (53%), not wanting to change (36%), and there is not enough financial support (31%).

34% 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 (36%)

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



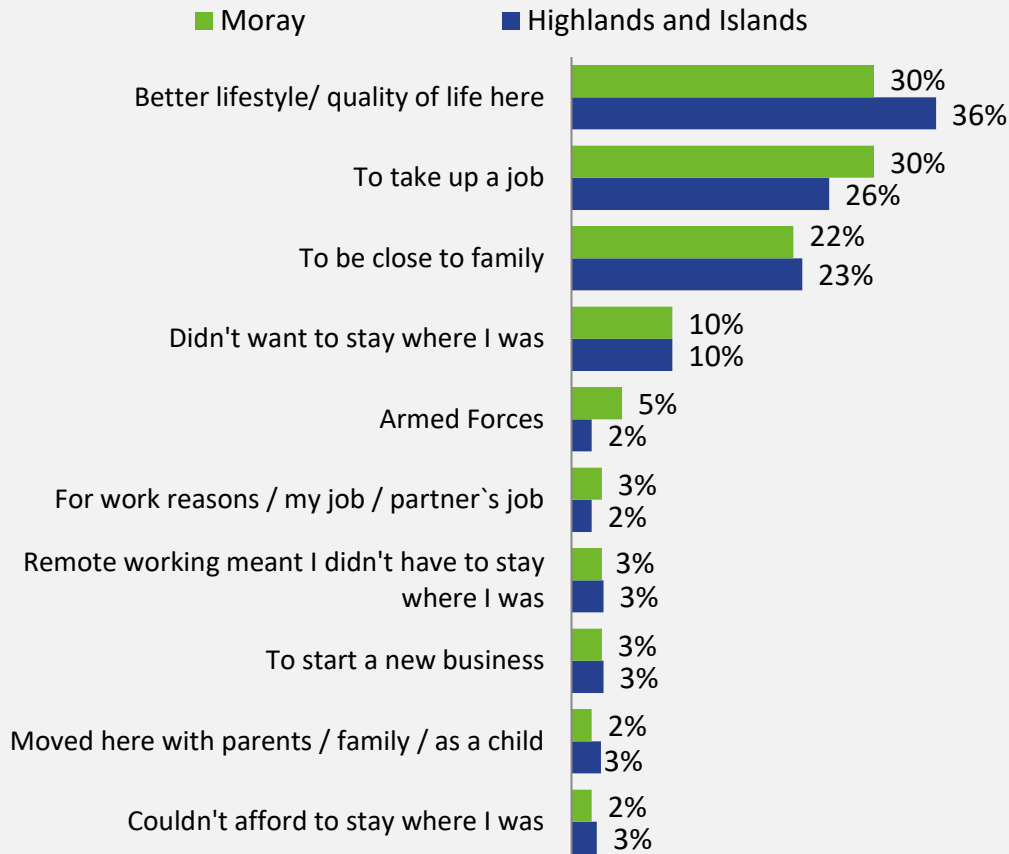
Base: All households in Moray (736); fieldwork = 28 January - 25 March 2022

REASONS FOR MOVING TO THE AREA

Among those in Moray who have not always lived in the Highlands and Islands, the main reasons for moving to the region were for a better quality of life or to take up a job. However, while a higher proportion than regionally mentioned taking up a job as a key reason for migrating, fewer than average mentioned better quality of life.

Residents in Moray are less likely than those across the region overall to feel that people are leaving their local area because they can't find work or that those that move to the area are retired. They are also less likely to agree that new businesses are starting up or that people are moving to Moray for new job opportunities.

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 Moray (546) and in Highlands and Islands (3,449); fieldwork = 28 January - 25 March 2022

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



30% say they moved there for a better quality of life, lower than the region overall



30% say they moved to take up a job, higher than the region overall (26%)

Among all households in Moray:

38% say people are leaving their local area because they can't find work, lower than the region overall at 47%*

39% say new businesses are starting up, lower than the region overall (46%)

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

24% say more people are moving to their local area for new job opportunities, lower than regionally (29%)

Note: Figures for Moray were revised on 14 October 2022 following initial publication on 13 October 2022.

PRIORITIES FOR COMMUNITIES TO THRIVE

The top priorities for communities in Moray to thrive are: more job opportunities, housing for local families, and local businesses and trades. More local businesses and trades is a higher priority for Moray than regionally, while housing for local families and more working age people moving into the area are lower priorities.

Optimism

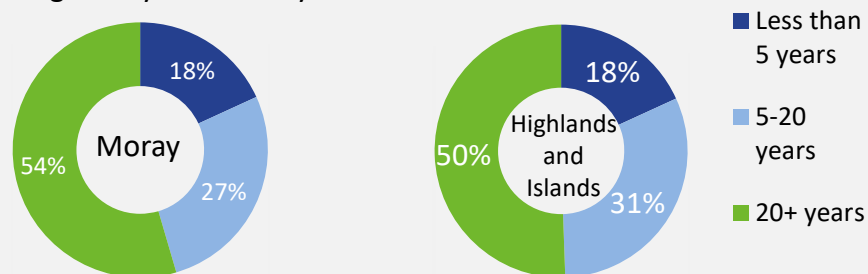
49% of Moray residents are optimistic about their community, in line with the region overall (52%), while 13% are pessimistic, lower than the region overall (16%).

Length of residence and future intentions

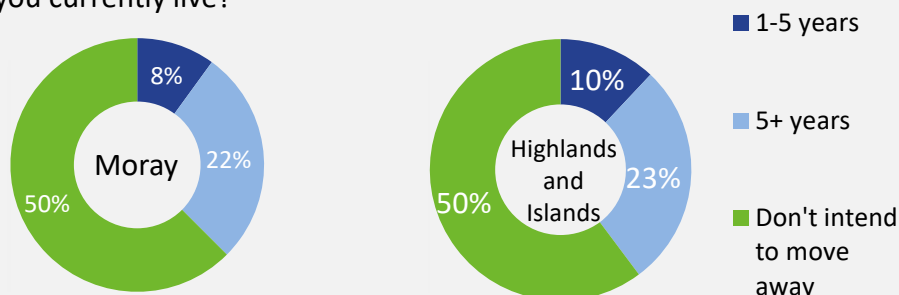
54% of residents have been living in their local area for more than 20 years, compared to 50% in the region overall. 27% have lived in their local area for between 5 and 20 years and 18% for less than five years.

In terms of future intentions, 50% of residents don't intend ever to move away from their local area, the same proportion as in the region overall.

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?

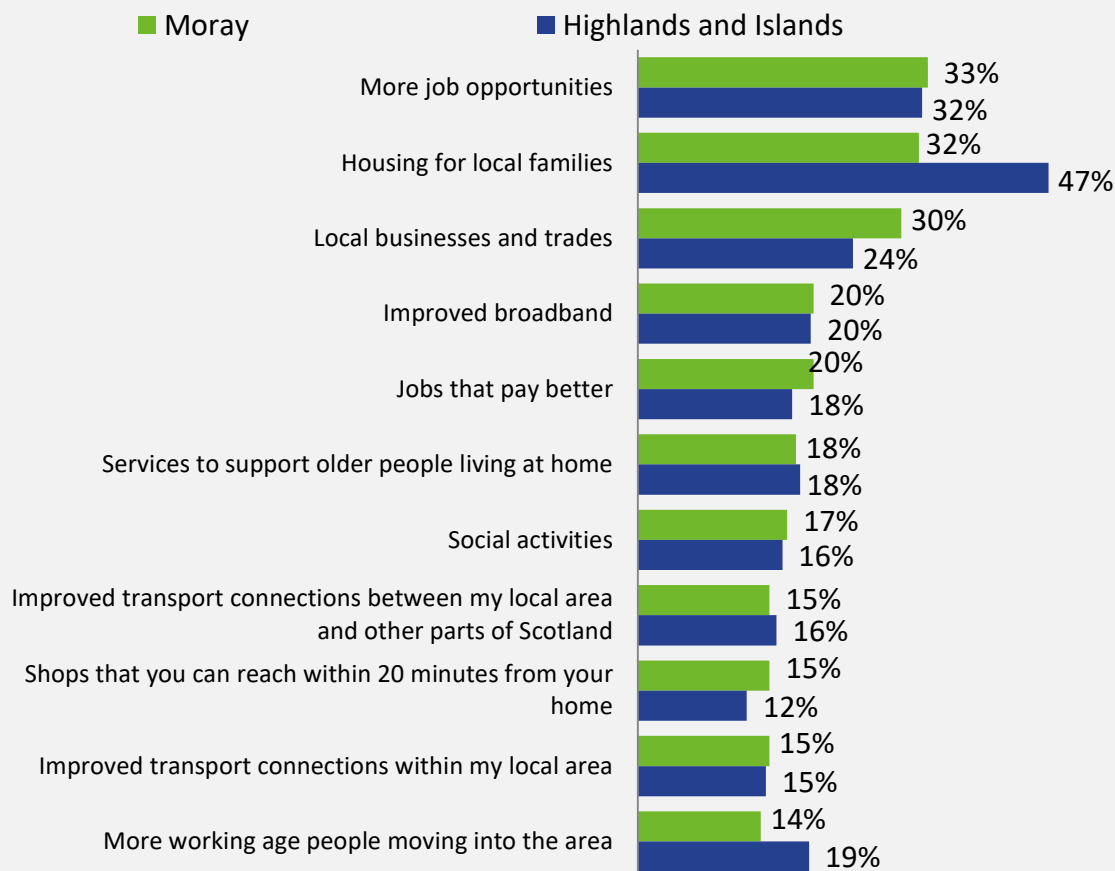


Base: All residents, aged 16+ in Moray (872) and the Highlands and Islands (5,301); fieldwork = 28 January - 25 March 2022

Priorities

Local businesses and trades (30%) are a higher priority for communities in Moray, compared to the region overall (24%). Housing for local families (32%) and more working age people moving into the area (14%) are lower priorities compared to the average (47% and 19% respectively).

Q. Which of these, if any, does your community need to thrive in the future?



Base: All residents, aged 16+ in Moray (872) 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, Inverclyde, 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 Moray, 872 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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