Moray Council

Moray Citizens' Panel
2012 Survey

Final Report

Craigforth

November 2012

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SUMMARY FINDINGS

The 2012 survey covered a broad range of topics including:
- community planning;
- health, and health and social care services;
- children and young people;
- community safety;
- the economy (including transport and infrastructure, and sustainability);
- employment and training; and
- partnership working.

The survey was undertaken during July and August 2012, with the 504 responses (a 52% response rate) providing a robust basis for survey analysis (a 95% confidence interval of ±4.4%).

In relation to **community planning**, the main points of note are:
- *Employability and employment skills*, and a *growing & diverse economy* were seen as the most important priorities for Moray. These were scored around 1.8-1.9 out of 7 (a lower score indicating higher importance).
- Other priorities: healthier citizens; ambitious and confident children & young people; and, adults living healthier, sustainable independent lives, were all scored around 2.3-2.4 out of 7. This suggests that respondents saw all five themes as highly important for Moray.

In relation to **healthier citizens**, the main points of note are:
- All health themes were seen as significant priorities for Moray. The most significant priority for respondents was *hazardous and harmful drinking* (scored 2.01), with *ageing population* (2.21), *obesity* (2.3), *mental health and wellbeing* (2.35) and *balance of care* (2.37) also seen as priorities.
- *More education/awareness raising*, and *encouraging healthier lifestyles and a positive outlook* were consistently identified as potentially effective approaches to tackling a range of health-related priorities. In addition, confidential specialist advice was highlighted in relation to sexual health and mental health. Services working more effectively together and focusing more specifically on vulnerable people were also highlighted in relation to mental health.

In relation to **ambitious and confident children & young people**, the main points of note are:
- All stages of a child's life was seen as an important focus for services, but it is notable that respondents scored primary and secondary school years as the most important (scores of around 1.8, compared to 2.1 for pre-school years and 2.3 for pregnancy).

- In terms of more specific priorities, *teenage pregnancies*, *smoking during pregnancy*, and *ensuring sufficient services for children with Additional Support Needs* were seen as the highest priorities for local services.

- On pupil attainment in Moray, respondents had generally seen no real change in attainment over the last 5 years (more than half suggested this), and generally felt that attainment levels in Moray were broadly similar to other parts of Scotland (more than 3 in 4 suggested this). Respondents scored exam based attainment as the most important aspect of school attainment (scored 1.7), although vocational qualifications and other experience were also scored very highly.

- In relation to improving school attainment, *encouraging pupils and their families to have high expectations*, and *improving the quality of secondary school provision* were seen as likely to have the most significant impact.

In relation to **post-school education**, the main points of note are:

- The *quality of colleges and universities elsewhere*, *lack of availability of courses in Moray*, and *lack of well-paid employment opportunities in Moray* were seen as the main reasons for high numbers of young people leaving school to take further education out of the area.

- *Offers of full university courses in Moray* was seen as somewhat more likely than other options to encourage school leavers to remain in Moray, although relatively few respondents felt that any of the options would make school leavers "much more likely" to stay.

In relation to **self-directed support**, the main points of note are:

- In terms of telecare and telehealth, respondents were most likely to have heard of smoke detectors and community alarm services. However, a substantial proportion indicated that they may be willing to use other services if needed – most notably *fall detectors* (75%), *wandering alert*s (72%) and *temperature sensors* (70%).

- A large majority of respondents had used the internet for *information or advice on a specific condition*, and this was also seen as the area where websites can have the most benefit. Other uses for the internet (e.g. information to help carers, and to access services) were less commonly used by respondents, although most felt that these could have some significant benefit.

In relation to **community safety and antisocial behaviour**, the main points of note are:

- *Antisocial behaviour* and *tackling alcohol as a cause of crime and safety issues* were scored as the most important community safety areas for Moray.

- In relation to work already undertaken to tackle community safety issues, *fire and home safety* was scored as having the most significant impact.

In relation to **adult protection**, the main points of note are:

- Around 2 in 5 respondents indicated that they and/or a member of their family had been subjected to bullying or harassment.

- Around 1 in 5 of those who had (or whose family member had) experienced bullying or harassment indicated that they had not spoken to anyone about this. In terms of those that had spoken to someone about the issue, this was most commonly parents or family, and teachers. This may suggest that a large proportion of these incidents involved bullying or harassment of children.

In relation to **Moray's economy, employability and employment skills**, the main points of note are:

- *Low wages* was most commonly identified as an economic weakness in Moray, although other issues were also seen as a weakness by the majority of respondents (a *high concentration of public sector jobs*, *an ageing population* and *young people leaving the area*).

- In terms of priorities for Moray's economy *tourism*, and to a lesser extent *food and drink* and *energy* were seen as the most important areas.

- The full range of organisations and communities were seen as having a role in developing Moray's economy. However it is notable that *Moray Council* was most likely to be identified as having a lead role (around half suggested this), while the *business community*, *HIE* and *the local population* were most likely to be seen as having a significant role. *Developing the tourism sector* and *innovation in business and technology* were seen as the most important approaches to develop the economy.

- *Lack of aspiration and ambition* and *lack of interest in further education* amongst Moray's children were seen as the main reasons for the smaller proportion of Moray's young people going into further education. However, while most would like to see some increase in this, it was also noted that "further education is not right for everyone".

In relation to **climate change, renewable energy and sustainable transport**, the main points of note are:

- Respondents felt that *making homes more energy efficient* would have the most impact in reducing carbon emissions. This was also the measure that respondents would be most willing to try, although most would also consider *doing more to recycle waste* and *buying more local produce*.

- In relation to investing in renewable energy, more than 9 in 10 respondents agreed with *supporting developments that contribute most to the local economy and employment*. In addition, a large majority agreed that supporting the development of renewable energy should be a major local priority, with a focus on supporting developments which minimise the impact on the local environment.

- In terms of types of renewable energy, *hydropower* and *solar energy* were rated as the best options for Moray.

- Respondents would be most likely to consider using sustainable transport (public transport, cycling or walking) for *travel to school/education* or *travel for shopping/banks/etc.* The *ease of using a car* and *lack of buses/trains at convenient times* were the most common reasons for people not using sustainable transport, while *more frequent services* and *cheaper fares* would be most likely to encourage more public transport use.

In relation to **transport and infrastructure**, the main points of note are:

- *Excessive speed*, *inexperienced/young drivers* and *alcohol/drug use* were seen as having the greatest impact on road safety in Moray.

- In terms of tackling excessive speed, *20mph speed limits in residential areas*, *more use of mobile speed cameras*, and *more use of speed indicator signs* were seen as the most effective approaches.

In relation to **waste and recycling**, the main points of note are:

- An overwhelming majority of respondents agreed that *reducing waste is important for the people of Moray* and that *the development of recycling services should be a major local priority*. Most also agreed that *people could be persuaded to recycle more with the right kind of encouragement*.

- The majority of respondents agreed that *there is sufficient information to help people to reduce their waste*, but there remained around 1 in 5 who disagreed with this. Moreover, the majority agreed that *publicity and awareness raising campaigns could help change attitudes to waste and recycling*.

In relation to **partnership working**, the main points of note are:

- *Leaflets and posters in libraries, GP surgeries and other public spaces* were most likely to be identified as the means of communication for the Community Planning Partnership. However, it is notable that most communication options were supported by a substantial proportion of respondents.

- Nearly half of respondents indicated that they had done or would be interested in giving their views/ helping to tackle local issues (outwith the Citizens' Panel). Taking part in surveys was by far the most widely preferred option for giving views or helping to tackle local issues (by around 3 in 4).

1.   INTRODUCTION

1.1.   The 2012 survey covered a broad range of topics including:

- community planning;

- health, and health and social care services;

- children and young people;

- community safety;

- the economy (including transport and infrastructure, and sustainability);

- employment and training; and

- partnership working.

1.2.   The survey was undertaken during July and August 2012, with 504 responses (a 52% response rate) received by consultation close in late August. This level of response provides a robust basis for survey analysis, and as a guide on a random sample basis this volume of responses would equate to a 95% confidence interval of around ±4.4%.

1.3.   Figure 1 over the page provides an overview of the profile of survey respondents.

Figure 1: Profile of Survey Respondents

Gender

Male, 49%

Female, 51%

Age

45-64, 57%

65+, 24%

Under 45, 20%

Area

Keith, 11%

Lossiemouth, 14%

Forres, 16%

Speyside, 16%

Fochabers, 16%

Buckie, 14%

Elgin, 13%
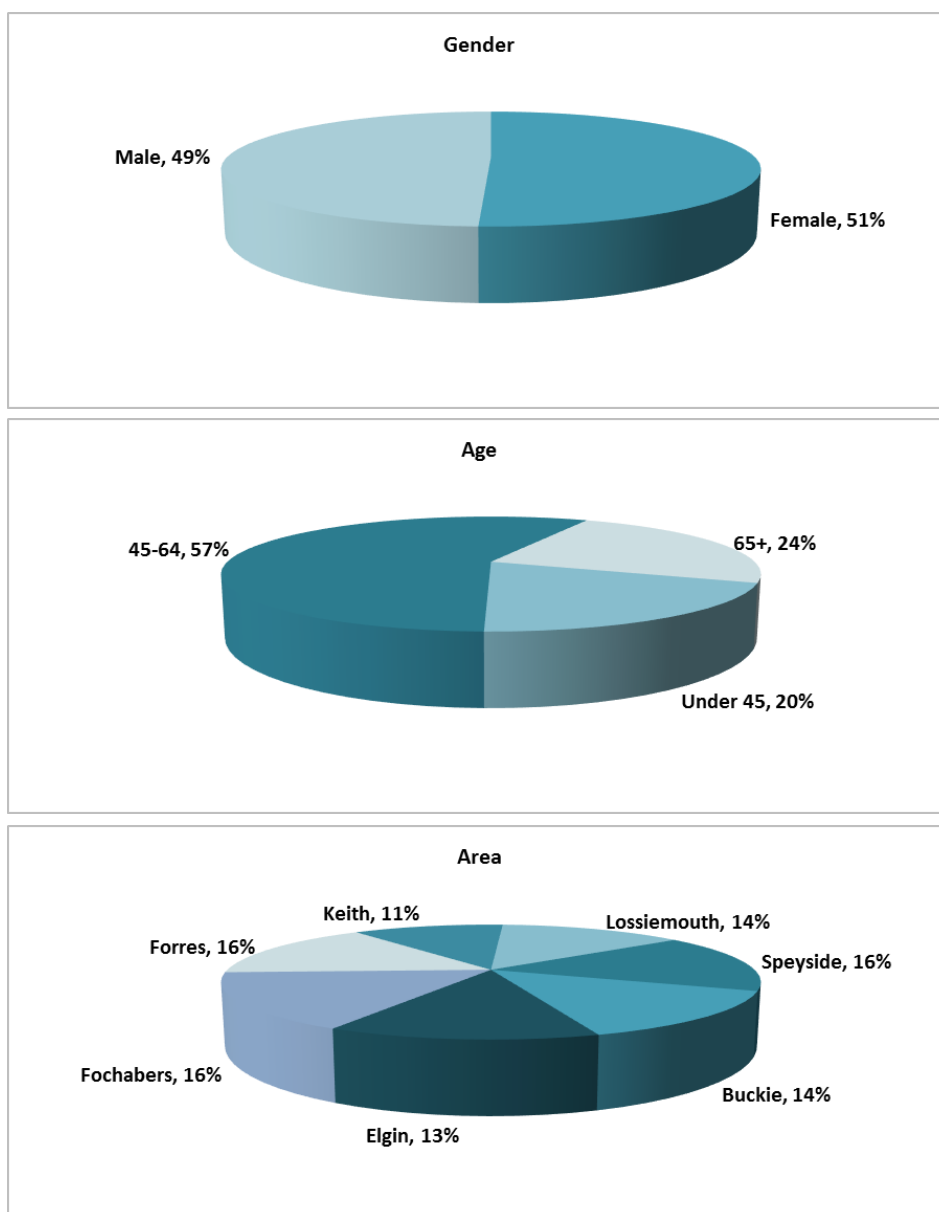
1.4.   This report provides a full account of survey findings, focusing primarily on the overall balance of views in relation to each of the key themes. However, analysis has also considered the extent of variation in views expressed across key groups including age, location and gender.   This report highlights significant variations in views across these groups, based on 95% confidence interval statistical significance tests.

2. COMMUNITY PLANNING THEMES

2.1. The survey began by asking Panel members for their views on the five key community planning themes identified for Moray, around which Moray's draft Single Outcome Agreement is based. Figure 2 summarises respondents' rating of these five themes, with each having been scored out of 7 and a lower score indicating greater importance:
- healthier citizens;
- ambitious and confident children & young people;
- adults living healthier, sustainable independent lives;
- a growing and diverse economy; and
- employability & employment skills.

2.2. Moray's economy and employment emerged as the key theme for survey respondents, with *employability & employment skills* and *a growing & diverse economy* rated as the most important priorities (respective scores of 1.78 and 1.88 out of 7).

2.3. The other three priorities: *healthier citizens*; *ambitious & confident children & young people*; and *adults living healthier, sustainable independent lives*, were rated as notably less important than employability and economy. Nevertheless, with scores of 2.3 to 2.4 out of 7 survey results suggest that respondents see all five themes as highly important for Moray.

2.4. Survey results suggest there is no significant variation across key socio-demographic groups in respondents' views on the importance of these themes – perhaps surprising given some themes are likely to be of more direct relevance to specific age groups than others, for example.

Figure 2: To what extent do you feel that these are important themes for Moray?
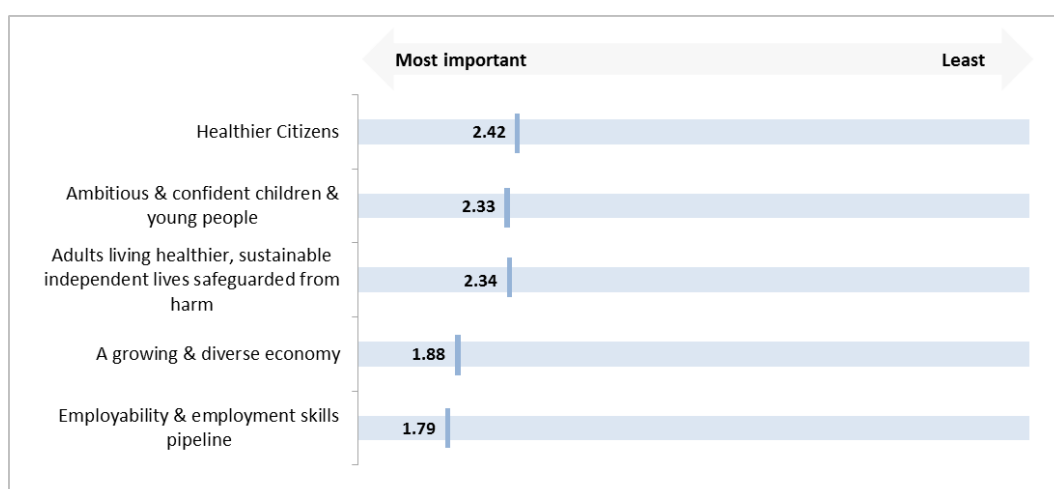
2.5. Sections 3 to 7 of this report consider Panel members' views on specific issues within each of these five Community Planning themes in turn.

3.   HEALTHIER CITIZENS

3.1.   *Healthier citizens* was the first of the five community planning themes considered by the survey, and here the survey sought to gather views on the importance of a range of specific health issues in Moray, and potential approaches to tackling these issues.

3.2.   Looking first at views on health priorities for Moray, as Figure 3 indicates all health themes were seen as significant priorities for Moray. Indeed each of the listed themes were scored between 2 and 3 (out of 7). Nevertheless, some themes emerged as particular priorities with the following being scored as the highest priorities: *hazardous and harmful drinking* (scored 2.01); *ageing population* (2.21); *obesity* (2.3); *mental health and wellbeing* (2.35), and, *balance of care* (2.37).

3.3.   In terms of other health issues, *sexual health and blood borne diseases* was given the lowest average score (2.93 out of 7). However, it should be noted that 2 in 5 respondents scored this issue as 1 or 2 out of 7, suggesting that a substantial proportion of respondents still saw *sexual health and blood borne diseases* as a significant health priority for Moray.

Figure 3: Do you feel that tackling the following health issues should be priorities for Moray?
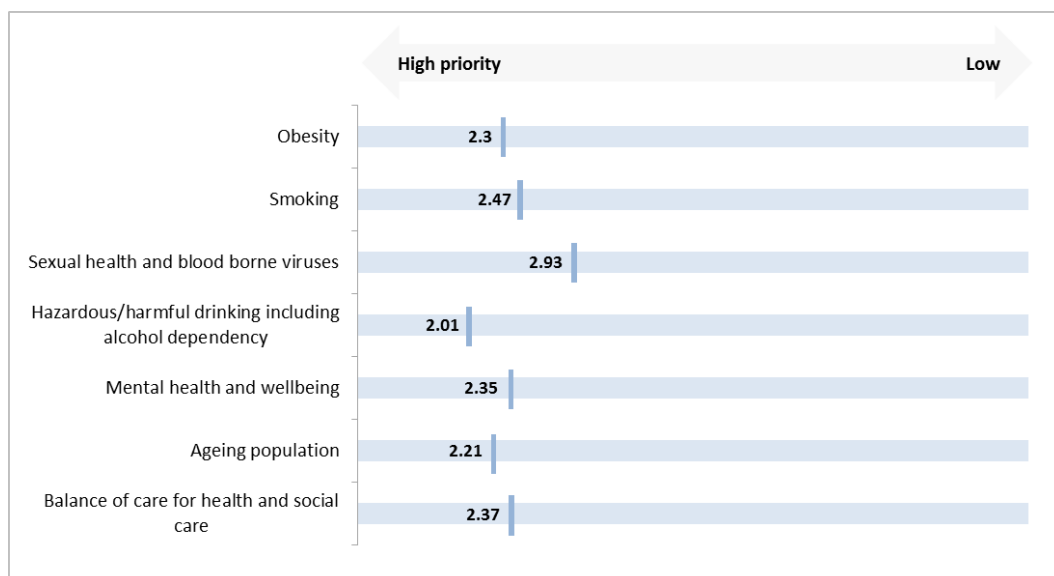
3.4.   In addition to views on health priorities for Moray, the survey also sought to gauge views on potential approaches to tackling each of five health issues:

- obesity;
- smoking;
- sexual health;
- mental health and wellbeing; and

- alcohol dependency.

3.5. Looking across the range of approaches listed at Figure 4, it is clear that *more education/awareness raising through schools* is seen as a key means of addressing health issues in Moray. Indeed this emerged as one of the most commonly suggested approaches in relation to four of the five health issues. Nevertheless, there was some significant variation in the kinds of approaches that respondents felt would be effective in tackling specific health issues, and views are summarised below:

- *More education/awareness raising through schools* and *encouraging healthier lifestyles and a more positive outlook* were the most commonly suggested approaches to tackle obesity and smoking.

- In relation to sexual health, *more education/awareness raising through schools* and *confidential specialist advice for people affected* were the most commonly suggested approaches.

- In relation to mental health and wellbeing suggested approaches centred on specific service approaches rather than, for example, more general education or health promotion. In particular, the most common suggestions to tackle mental health and wellbeing were *confidential specialist advice for people affected*, *services working more effectively together* and s*ervices focusing more specifically on vulnerable people at risk*.

- In relation to alcohol dependency, *tackling excessive alcohol consumption and alcohol misuse*, and *more education/awareness raising through schools* were the most commonly suggested approaches.

Figure 4: Which of the following do you think could help to tackle each of these issues in Moray?

	Obesity	Smoking	Sexual health	Mental health/ Wellbeing	Alcohol dependency
More education/awareness raising in Moray	46%	44%	43%	35%	36%
More education/awareness raising at an early stage through schools	63%	68%	65%	25%	54%
More classes/support services in Moray	22%	20%	16%	30%	23%
Confidential specialist advice for people affected	36%	22%	56%	61%	43%
Services working more effectively together to tackle issues	32%	28%	27%	52%	34%
Services focusing more specifically on vulnerable people at risk	17%	13%	30%	50%	24%
Tackling excessive alcohol consumption/ alcohol misuse in Moray	17%	8%	12%	13%	67%
Encouraging healthier lifestyles and a more positive outlook in Moray	64%	58%	22%	27%	32%

4.   AMBITIOUS AND CONFIDENT CHILDREN & YOUNG PEOPLE

4.1.   The survey moved on to gauge views in relation to the theme of *ambitious and confident children & young people*. Here the survey sought views on key service priorities under the theme, and also considers specific issues around pupil attainment and post-school education in Moray.

4.2.   This section of the survey began by asking about service priorities across key stages of a child's life, from pregnancy through to secondary school age (Figure 5). Survey results suggest that all stages of a child's life are seen as an important focus for services, but it is notable that *primary and secondary school years* were scored as particularly important (scores of 1.79 for secondary school and 1.81 for primary school). This compares to 2.1 for *pre-school years* and 2.3 for *during pregnancy*.

Figure 5: In relation to pregnancy and pre-school years, where do you think local services should focus?
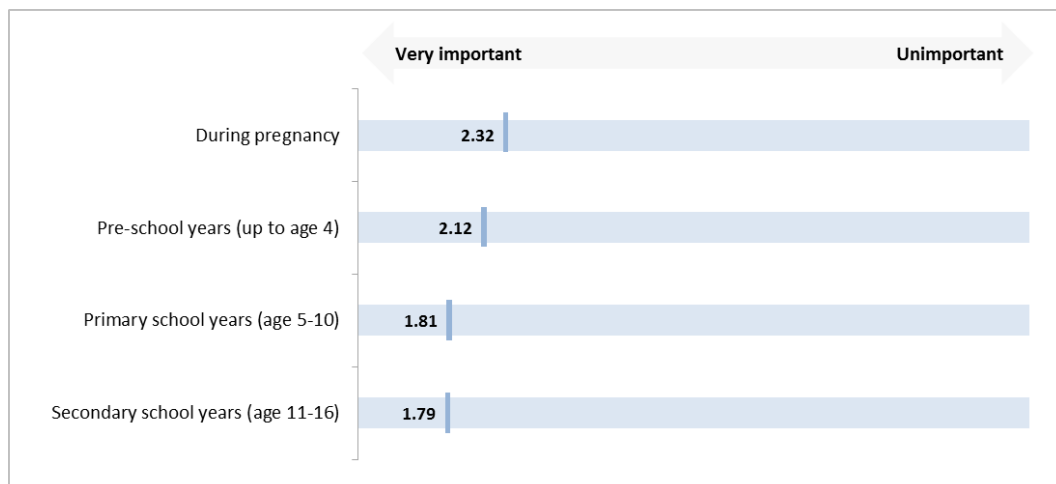
4.3.   The survey also sought views on the importance of specific issues affecting children's home environment (which has been shown to have a significant impact on a child's education and life prospects). All three of the issues listed at Figure 6 were seen as important priorities for services, with ratings of around 1.8 out of 7 for each of *helping families provide the right home environment for children*, *providing good quality pre-school education*, and *providing children starting primary school with the support they need*.

Figure 6: In relation to home environment, where do you think local services should focus?
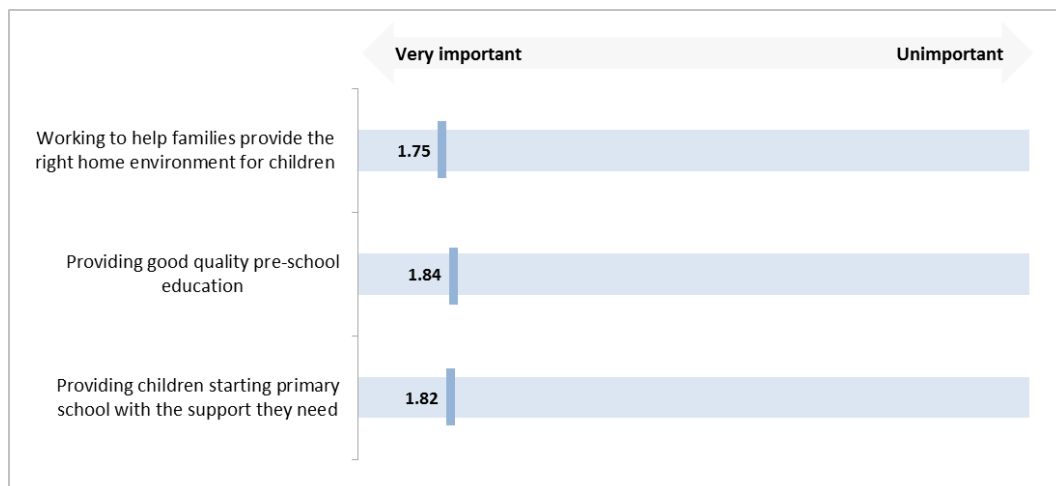
4.4.   Looking across the range of issues affecting children and young people in Moray, *teenage pregnancies*, *smoking during pregnancy*, and *services for children with Additional Support Needs* were identified as the main priorities for local services. These were significantly more likely than other issues to be rated as a "high priority" (by 64%, 62% and 62% of respondents respectively). Nevertheless, the following issues were also rated as priorities by a significant proportion of respondents:

- parents smoking during child's early years (54% rating as "high priority");

- availability of nursery places (50%); and

- availability and quality of playgroups and parent & toddler groups (46%).

4.5.   Survey results suggest some significant variation across key socio-demographic groups in the priority attached to the issues listed at Figure 7. In terms of age, it is notable that older respondents (aged 65+) assigned higher priority to smoking during pregnancy and parents smoking during child's early years, with those aged under 45 less likely to identify these as a high priority. Significant variations were also evident across areas including teenage pregnancies being a higher priority for Lossiemouth respondents, and the availability of playgroups/parent & toddler groups/nursery places being a higher priority for Elgin and Keith.

Figure 7: To what extent do you think the following should be priorities for local services?

	High priority	Some priority	Little/No priority	Don't know
Teenage pregnancies	64%	28%	6%	1%
Smoking during pregnancy	62%	29%	9%	1%
Ensuring sufficient services for children with Additional Support Needs	62%	32%	5%	1%
Parents smoking during child's early years	54%	38%	8%	1%
Availability of nursery places	50%	41%	8%	1%
Availability and quality of playgroups and parent & toddler groups	46%	45%	9%	1%
Availability and quality of childcare	40%	49%	9%	1%
Parenting classes	35%	47%	16%	2%
Support for breastfeeding	25%	50%	22%	3%

Pupil Attainment

4.6. The survey included a series of questions specifically related to pupil attainment in Moray. In particular, this section sought views on how pupil attainment has changed over recent years and compares to other parts of Scotland, views on the key elements that influence pupil attainment, and views on the changes that would have the greatest impact on pupil attainment in Moray.

4.7. Survey respondents had generally seen no real change in pupil attainment over the last 5 years; up to around 3 in 5 suggested that attainment levels were "about the same" as 5 years ago (59% for primary schools and 55% for secondary – see Figure 8). Amongst those who felt that there had been a change in pupil attainment, views were somewhat divided on whether attainment was better or worse than 5 years ago. On primary school attainment, respondents who had seen an improvement (25%) outnumbered those who felt that pupil attainment is worse than 5 years ago (17%). On secondary school attainment, views were more balanced (24% felt attainment was better, and 21% worse).

4.8. Respondents also generally agreed that pupil attainment levels in Moray are broadly similar to other parts of Scotland, with around three quarters suggesting this (77% for primary and 75% for secondary – see Figure 9). Amongst those who did see a difference in attainment views were again clearer in relation to primary schools; those who felt primary attainment in Moray was better than elsewhere (17%) outnumbered those who felt attainment was worse in Moray than elsewhere (5%).

Figure 8: How do you think pupil attainment in Moray compares to 5 years ago?

	Better than 5 years ago	About the same as 5 years ago	Worse than 5 years ago
Primary schools in Moray are…	25%	59%	17%
Secondary schools in Moray are…	24%	55%	21%

Excludes "don't know" responses

Figure 9: How do you think pupil attainment in Moray compares to other parts of Scotland?

	Better than elsewhere	About the same as elsewhere	Worse than elsewhere
Primary schools in Moray are…	17%	77%	5%
Secondary schools in Moray are…	14%	75%	11%

Excludes "don't know" responses

4.9. As Figure 10 below indicates, *exam-based attainment* was generally rated as the most important aspect of school attainment (scored 1.7 out of 7). However, it is important to note that *vocational qualifications* - and to a lesser extent *other vocational or volunteering experience* - were also clearly seen as important aspects of pupil attainment (scored 1.89 and 2.09 respectively).

Figure 10: How would you rate the importance of the following parts of school attainment?
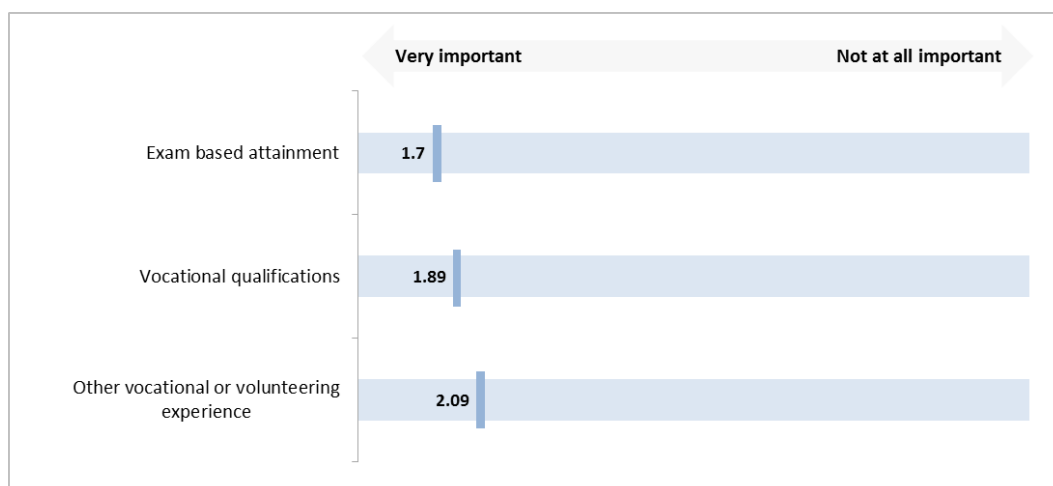
4.10.   Finally on pupil attainment, the survey sought views on potential measures that could improve attainment in Moray's schools (Figure 11). *Encouraging pupils and their families to have high expectations*, and *improving the quality of secondary school provision* emerged as the measures which respondents felt would have the most significant impact on pupil attainment in Moray (respectively scored 1.82 and 1.88 out of 7). These were by some margin the highest rated potential changes, but it should be noted that the following changes were also seen as having a potentially significant positive impact on pupil attainment in Moray:

- improve quality of primary school provision (scored 2.11 out of 7);

- provide children starting primary school with support they need (2.13);

- ensure sufficient services for children with Additional Support Needs (2.14); and,

- work to help families provide the right home environment for children (2.15).

Figure 11: Which of the following changes do you think would have the greatest impact on pupil attainment in Moray's schools?
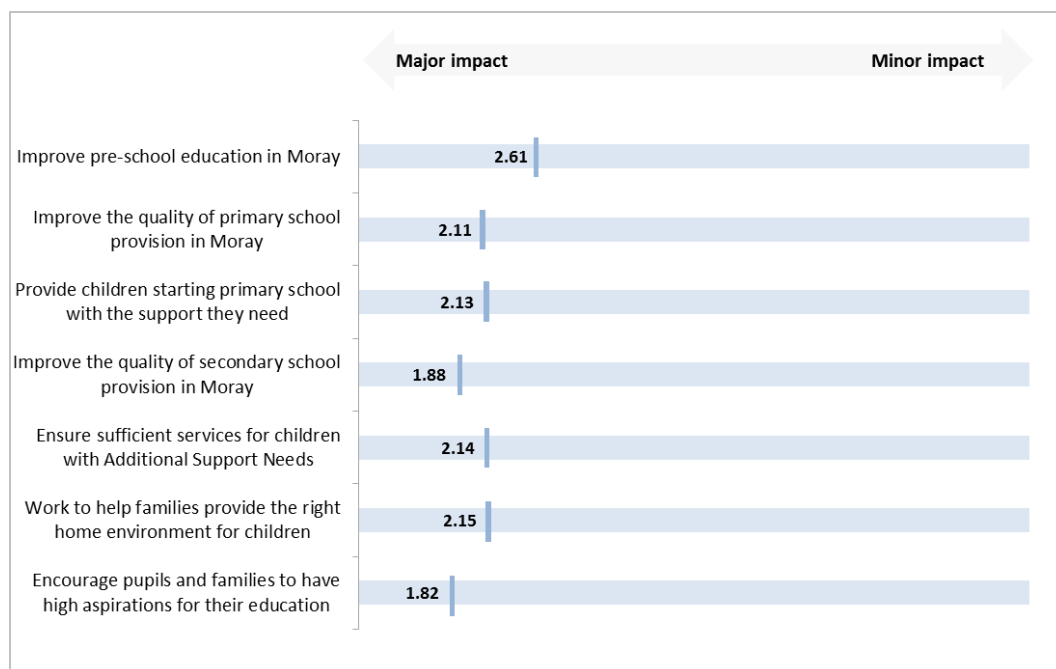
Post-School Education

4.11.   The survey also sought views on post-school education in Moray, and specifically in relation to the trend for substantial numbers of young people taking up further education out of Moray.

4.12.   In terms of the potential reasons for this trend, the *better quality of colleges and universities elsewhere* was the most commonly mentioned factor (by 75%). Moreover, this was the most likely to be identified by respondents as the most important factor influencing young people taking further education out of Moray (around 2 in 5 suggesting this, 43%).

4.13.   Looking at other potential reasons for the trend, *lack of employment opportunities in Moray*, a *lack of well-paid employment in Moray*, and young people taking the *opportunity to experience a new place* were also commonly suggested factors (respectively by 68%, 65% and 65%). In addition, it is notable that while *lack of availability of college or university courses in Moray* was not particularly commonly mentioned overall, this was the second most common factor in terms of the "most important" reasons for young people taking further education out of Moray.

4.14.   Some variation was evident across key socio-demographic groups in the reasons suggested for young people taking up further education out of Moray. Most notably, in terms of geographic area Elgin respondents were most likely to highlight a lack of local employment opportunities, while Keith respondents were most likely to mention a lack of transport or high transport costs.

Figure 12: What do you think are the main reasons for the high number of young people leaving school to take further education out of Moray?

	All reasons	Most important reason
Better quality/more prestigious colleges or universities elsewhere	75%	43%
Lack of employment opportunities in Moray	68%	14%
Lack of well-paid jobs in Moray	65%	7%
Opportunity to experience a new place	65%	7%
Lack of availability of college or university courses in Moray	48%	24%
Lack of transport/high transport costs in Moray	32%	2%
Lack of opportunities for socialising and night life in Moray	31%	1%
Lack of amenities/recreational opportunities in Moray	30%	1%
To be further away from family/friends	13%	1%
Better availability of affordable accommodation elsewhere	10%	1%
Other	4%	-

4.15.   Finally for this section of the survey, views were sought on the potential impact of three specific measures to encourage more school leavers to remain in Moray (Figure 13).

4.16.   There was relatively little variation in views on the three measures, with around 7 in 10 respondents suggesting that each would have some impact in terms of making school leavers more likely to remain in Moray. However it is worth noting that *offers of full university courses in Moray* was rated as somewhat more likely than other options to encourage school leavers to remain in Moray; 39% suggested this would make school leavers "much more likely" to stay, compared to 23% for the *option to complete part of a university course in Moray*.

Figure 13: To what extent do you think the following would make school leavers more likely to remain in Moray?

	Much more likely	Somewhat more likely	No change	Don't know
Making university education available in Moray	32%	38%	22%	8%
Option to complete part of university course in Moray, with the remainder of the course completed elsewhere	23%	49%	19%	9%
Offer of a full university course in Moray	39%	33%	19%	9%

5.   ADULTS LIVING HEALTHIER, SUSTAINABLE INDEPENDENT LIVES

5.1.   The next section of the survey asked a series of questions relating to the theme of *adults living healthier, sustainable independent lives safeguarded from harm*. This included questions on self-directed support, community safety and antisocial behaviour, and adult protection.

Self-Directed Support

5.2.   In relation to self-directed support, the survey first asked whether individuals had heard of a series of telecare and telehealth services.

5.3.   As Figure 14 indicates, and perhaps unsurprisingly, respondents were most likely to have heard of smoke detectors (nearly all aware of these, 98%) and community alarms (around two thirds heard of these, 67%). These were the only services of which a majority of respondents were aware, with around a quarter to a half of respondents having heard of other services. However, a substantial proportion of respondents indicated that they may be willing to use other services if they would help; most notably fall detectors (75%), wandering alerts (72%) and temperature sensors (70%).

5.4.   Perhaps surprisingly, there was no significant variation across age groups in awareness of telecare and telehealth services. However, it is notable that Elgin area respondents showed higher awareness of community alarm services than those in other areas.

Figure 14: Which of the following have you heard of, and which might you be willing to use if they would help you?

	I know all about this	**Might be willing to use if needed**
Smoke detectors	98%	40%
Community alarm	67%	59%
Fall detector	46%	75%
Temperature sensors	34%	70%
Wandering alert	28%	72%
Bed occupancy detector	25%	67%

5.5.   The survey also asked about the extent to which individuals had used the internet to access health-related information or services (Figure 15), and how useful Panel members felt websites were in this area (Figure 16).

5.6.   In terms of using the internet for health-related information services, *information or advice on a specific condition* was by far the most common with nearly 9 in 10 having done this (87%). It is notable that this was also seen as the area where websites can have the most benefit (rated 2.6 out of 7 – Figure 16).

5.7. Other uses for the internet: *information on healthy lifestyles*; *information to help carers*; and, *accessing health services*, were less commonly used by respondents. Around 40-50% of respondents indicated that they had used the internet for these purposes. Nevertheless most respondents felt that websites could have significant benefits in these areas; around two thirds of respondents felt that websites can have significant benefits in these areas, with average ratings of 2.8 to 3.1 out of 7).

Figure 15: Have you used the internet for any of the following?

Information or advice about a specific condition	87%
Information on healthy lifestyles	50%
Information or advice to help you care for someone else	41%
To access health services	42%

Figure 16: How useful do you think websites are for the following?
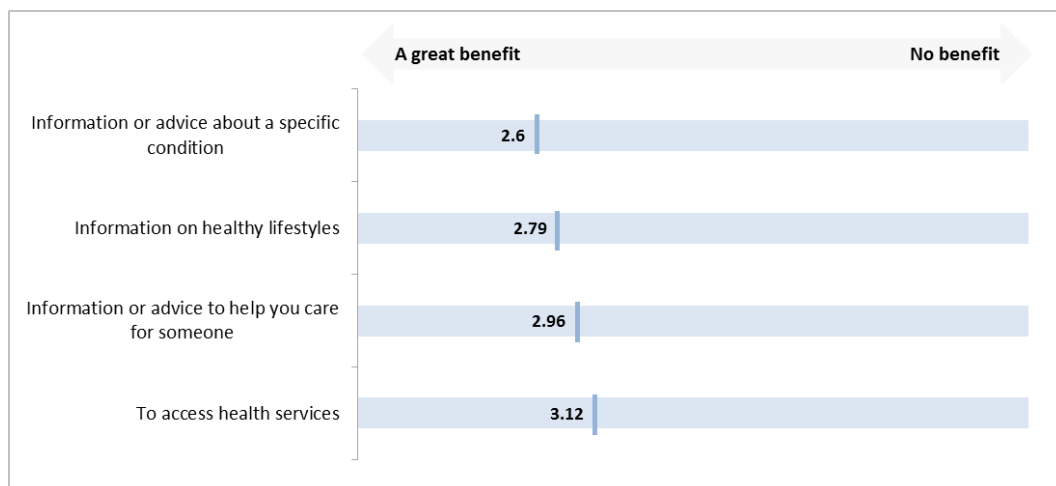
Community Safety & Antisocial Behaviour

5.8. In relation to community safety and antisocial behaviour, the survey first asked Panel members to rate the importance of a range of community safety issues for Moray (Figure 17).

5.9. *Antisocial behaviour* and *tackling alcohol as a cause of crime and safety issues* emerged by some margin as the most important issues for respondents. These issues were scored at around 1.6 out of 7, and it is notable that around two thirds of respondents gave the top "1" score (compared to around 40-50% for most other community safety issues).

5.10.   Notwithstanding the prominence ascribed to antisocial behaviour and tackling alcohol, it is clear that most of the issues listed at Figure 17 are seen by respondents as highly important for Moray. Issues such as *reducing violence*, *improving road safety*, and *fire and home safety* in particular were scored at around 1.8 to 2.1 (out of 7), with up to around half giving the top score.

5.11.   It is also interesting to note that the only issue not directly related to reducing crime and community safety issues, *reassuring and communicating with people*, was rated as less important than other issues. This issue was scored 2.5 out of 7, with around a quarter of respondents giving the top score.

Figure 17: Looking at the following community safety areas, which do you feel are most important for Moray?
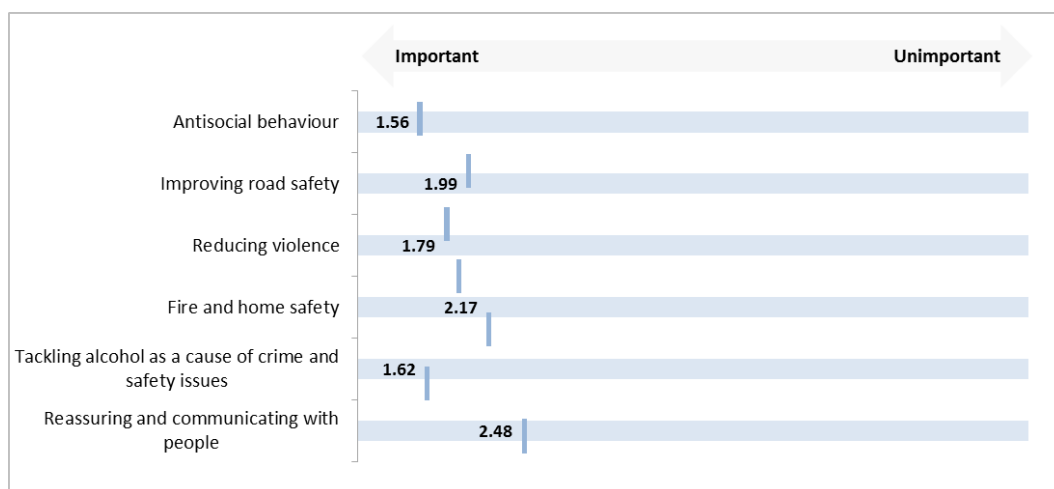
5.12.   The survey also asked for Panel members' views on how effective local partners have been in tackling these community safety issues. Figure 18 summarises responses.

5.13.   *Fire and home safety* was clearly seen by respondents as the area where partners have had the most positive impact. This was given a notably higher score than other issues (3.1 out of 7), and around two thirds of respondents clearly felt that partners had a positive impact on the issue (66% rated 1-3 out of 7).

5.14.   There was relatively little variation in the rating of partners' impact on other issues listed at Figure 18, with each scored at 3.5 to 4 out of 7. This suggests that while respondents feel that partners have had some positive impact in these areas, there is more work for partners to do in tackling these issues, with only a few respondents suggesting that there is a "lot more work needed" in these areas.

Figure 18: Thinking now about work already carried out in Moray to tackle these community safety issues, how would you rank the following areas?
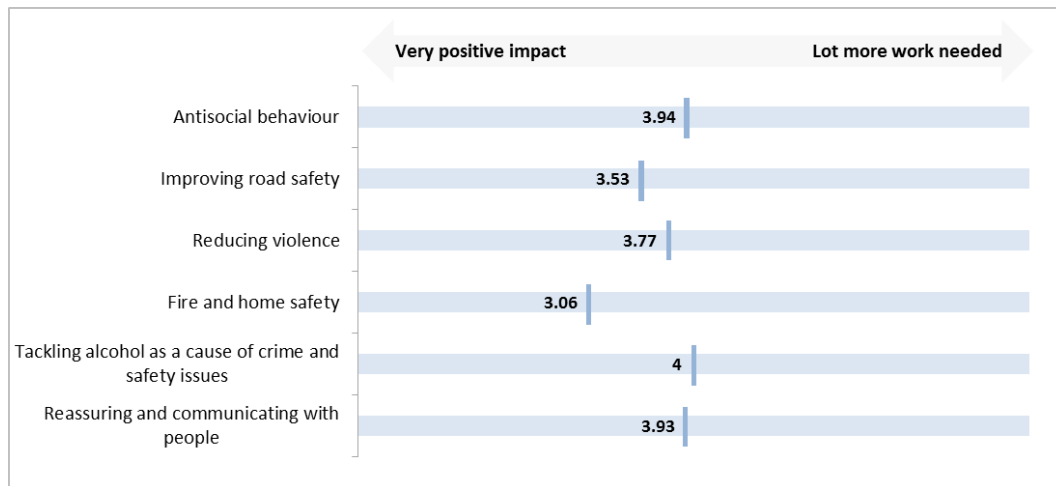
Adult Protection

5.15.   Finally for this section, the survey asked about Panel members' experience or awareness of bullying and harassment.

5.16.   As Figure 19 indicates, a substantial proportion had some experience of bullying or harassment. Indeed nearly half of respondents indicated that they and/or a member of their family had been subjected to bullying or harassment (45%), including nearly 1 in 10 who indicated that this was "frequent" (8%).

Figure 19: Are/have you or a member of your family ever been subjected to bullying or harassment?

	No, never	Yes, sometimes	Yes, frequently
You	72%	24%	4%
A family member	60%	34%	6%

5.17.   The majority of those who had, or whose family member had, experienced bullying or harassment indicated that they had spoken to someone about this (80%). This most commonly involved speaking to parents/family (65% of those affected by bullying/harassment) or teachers (59%), which may suggest that a large proportion of these incidents involved bullying or harassment of children.

5.18.   Parents/family and teachers also emerged as significant positive factors in helping to stop bullying/harassment (Figure 21).   These were the most commonly mentioned positive factors with 38% suggesting that parents/family helped, and 31% that teachers helped to stop bullying/harassment. In part this reflects the fact that parents/family and teachers were the groups most commonly contacted about bullying or harassment. Survey data also suggests that a substantial proportion of those who had contacted parents/family or teachers about bullying/harassment felt that this had a positive impact with around 3 in 5 of those who had contacted parents/family or teachers indicating that this had helped to stop the bullying.

5.19.   While a large majority of those affected by bullying or harassment indicate that they had contacted someone about this, it is also important to note that there remained around 1 in 5 who had not contacted anyone about this.

Figure 20: If you or a family member have been subject to bullying or harassment, did you or a family member speak to someone about it?

	Never contacted	Contacted once	Contacted more than once
Parents or family	35%	25%	40%
Teachers	41%	26%	33%
Police	53%	27%	19%
Social workers	93%	3%	4%
Housing officers	87%	2%	11%

Figure 21: If the bullying/harassment has stopped, did any of the following help with this?

Parents or family	38%
Teachers	31%
Police	27%
Social workers	3%
Housing officers	3%
Other	27%

6.   A GROWING AND DIVERSE ECONOMY

6.1.   The next section of the survey considered Panel members' views on a range of aspects under the theme of *a growing and diverse economy*.   This included questions relating to Moray's economy and employment, issues around climate change and sustainability, transport and infrastructure, and waste and recycling.

Moray's Economy

6.2.   In relation to Moray's economy, the survey first asked for views on potential weaknesses (Figure 22) and priorities (Figure 23).

6.3.   *Low wages* was the most commonly identified economic weakness for Moray, with around three quarters of respondents agreeing that this is a weakness for the area (76%). However, it is also clear that Panel members also see the other issues listed in the survey as areas of weakness; *young people leaving the area*, *an ageing population* and a *high concentration of public sector jobs* were all rated as weaknesses by a majority of respondents.

Figure 22: To what extent do you agree or disagree that the following are economic weaknesses in Moray?

	AGREE	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
High concentration public sector jobs	**63%**	28%	35%	19%	7%	11%
Low wages	**76%**	36%	40%	16%	1%	7%
An ageing population	**64%**	21%	43%	24%	6%	7%
Young people leaving the area	**67%**	27%	40%	20%	3%	11%

6.4.   In terms of priorities for Moray's economy (Figure 23 over the page), *tourism* emerged as the most important for respondents. This was scored 1.6 out of 7 – higher than other priorities by some margin - and more than half of respondents gave the top "1" score.

6.5.   It is worth noting that *food and drink* and *energy* were also rated as important economic priorities for Moray, with respective scores of 2.1 and 2.2 out of 7. In contrast, creative industries was rated as significantly less important than other economic priorities (score of 3.3).

Figure 23: To what extent do you feel that these are priorities for Moray's economy?
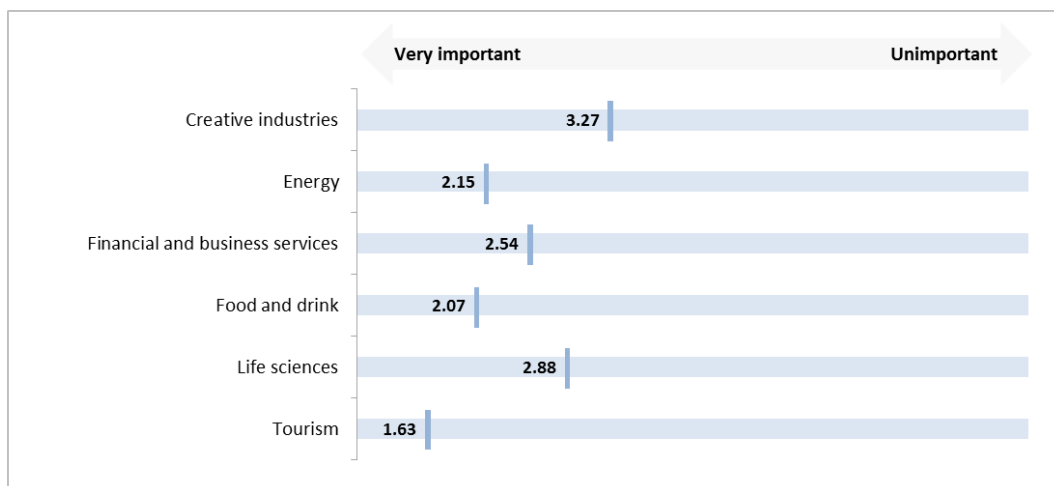
6.6. As Figure 24 below makes clear, the full range of organisations and communities were seen as having a role in developing Moray's economy. While most of the listed organisations and communities were seen as having at least a "significant" role to play in developing the economy, it is notable that Moray Council was by some margin the most likely to be identified as having a lead role to play; around half of respondents suggested this (52%). In addition, around 2 in 5 respondents felt that the business community, local population and Scottish Government had a lead role to play in developing the economy (43%, 39% and 36% respectively).

6.7. In terms of organisations that were seen as having a less significant role to play in developing the local economy, the most notable were the voluntary/third sector and Moray College. Up to around half of respondents felt that each of these should have no more than a limited role in developing Moray's economy (53% and 44% respectively).

6.8. Survey results suggest some limited variation across local areas in views on which organisations should take a lead role in developing Moray's economy. In particular Keith area respondents tended to see a stronger role for Moray Council and the Scottish Government, while Fochabers and Speyside respondents generally saw a smaller role for the Council and Government.

Figure 24: What kind of role do you think the following should have in developing Moray's economy?

	Lead role	Significant role	Limited role	No role
Moray Council	52%	40%	7%	1%
Business Community	43%	50%	8%	-
The local population	39%	48%	13%	1%
Scottish Government	36%	46%	16%	2%
Federation of Small Businesses	29%	47%	21%	2%
Highland & Island Enterprise	22%	49%	28%	1%
Chamber of Commerce	21%	46%	29%	4%
Moray College	13%	43%	37%	7%
Voluntary/ Third Sector	8%	39%	48%	5%

6.9.   The survey also asked Panel members about key themes for action in relation to Moray's economy (Figure 25).

6.10.   Tourism was again a prominent priority for respondents with *developing a high profile/high value tourism sector* and *innovation in business and technology* being rated as the most important approaches to develop the economy (each scored 1.8, and around half gave the top score). In contrast, *developing Moray's cultural, heritage and arts assets* was rated as less important, scored 2.6 out of 7 and only around 1 in 5 giving the top score.

Figure 25: Which of these themes are most important for you?
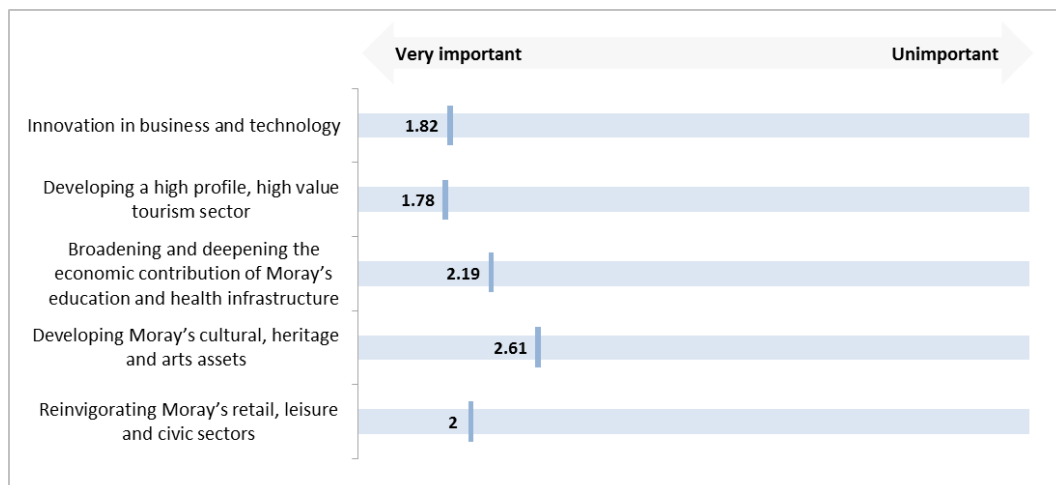
Climate Change, Renewable Energy & Sustainable Transport

6.11. The survey next considered views on a range of issues relating to sustainability, including measures to tackle climate change, development of renewable energy in Moray, and sustainable transport.

6.12. First, in relation to tackling climate change, respondents clearly rated *making your home more energy efficient* as the measure that would have the most impact in reducing carbon emissions; more than three quarters rated this measure amongst the three most effective (78%). It is interesting to note that this was also the measure that respondents would be most willing to try, with around 4 in5 indicating that they would "definitely" consider making their home more energy efficient (81%).

6.13. While *making your home more energy efficient* was rated as the most effective, and most appealing measure by respondents, a number of other measures were also highly rated. In particular *doing more to recycle your waste* and *buying more local produce* were both rated as effective measures to reduce carbon emissions; around half of respondents rated these as one of the top three most effective measures (55% and 49% respectively). Again there was some overlap between measures seen as having the most impact and those that respondents are most likely to consider doing. The majority of respondents indicated that they would "definitely" consider *doing more to recycle your waste* (76%) and *buying more local produce* (67%), and it is notable that together with *making your home more energy efficient* these were the only measures which most respondents would definitely consider doing.

6.14. There was relatively little variation across socio-demographic groups in views on these measures. Indeed the only notable variation appeared in relation to views on the potential impact of using more public transport. Older respondents and those in Buckie and Lossiemouth were more likely than others to feel that this would have a significant impact on carbon emissions.

Figure 26: Which of the following measures do you think would have the greatest impact, and which would you be willing to try?

|	Have the most impact	Would consider doing…			
		Definitely	Possibly	Definitely not	Don't know
Making your home more energy efficient	78%	81%	18%	1%	0%
Doing more to recycle your waste	55%	76%	22%	2%	1%
Buying more local produce	49%	67%	30%	2%	1%
Using renewable energy in the home	43%	48%	45%	5%	2%
Reducing your car use	33%	28%	47%	25%	1%
Using more public transport	27%	32%	39%	27%	2%
Reducing air travel	15%	22%	37%	28%	12%

6.15.   In relation to investing in renewable energy, Panel members were asked to indicate the extent to which they agreed with three statements (Figure 27).

6.16.   There was relatively strong agreement with each of the three statements, but it is notable that respondents showed strongest agreement with a *focus on supporting developments which contribute most to the local economy and employment*. More than 9 in 10 respondents agreed with this (94%), and half of all respondents "strongly" agreed.

Figure 27: To what extent do you agree or disagree with each of the following statements?

	AGREE	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
Supporting the development of renewable energy should be a major local priority	80%	35%	45%	12%	5%	3%
Focus on supporting developments which contribute most to local economy and employment	94%	50%	44%	5%	1%	1%
Focus on supporting developments which minimise the impact on the local environment	86%	37%	49%	8%	2%	3%

6.17.   As Figure 28 below indicates, hydropower was ranked as the best option in terms of pursuing renewable energy in Moray – this was given an average score of 2.2, by some margin the highest rated renewably energy option for Moray. It is notable that solar power was also rated relatively highly as a potential renewable energy option (an average score of 2.7), while in contrast wind power and biomass were rated as less preferable options (averages of 3.3 to 3.4).

6.18.   There was relatively little variation across renewable energy options for Moray, although it is notable that there appeared to be some correlation between views on wind power, and area and age. In particular, under 45s and those in Elgin tended to see wind power as a better option for Moray, than those aged 65+ and those in Fochabers, Forres and Speyside.

Figure 28: Rank the following renewable energy types in order of which should be pursued in Moray
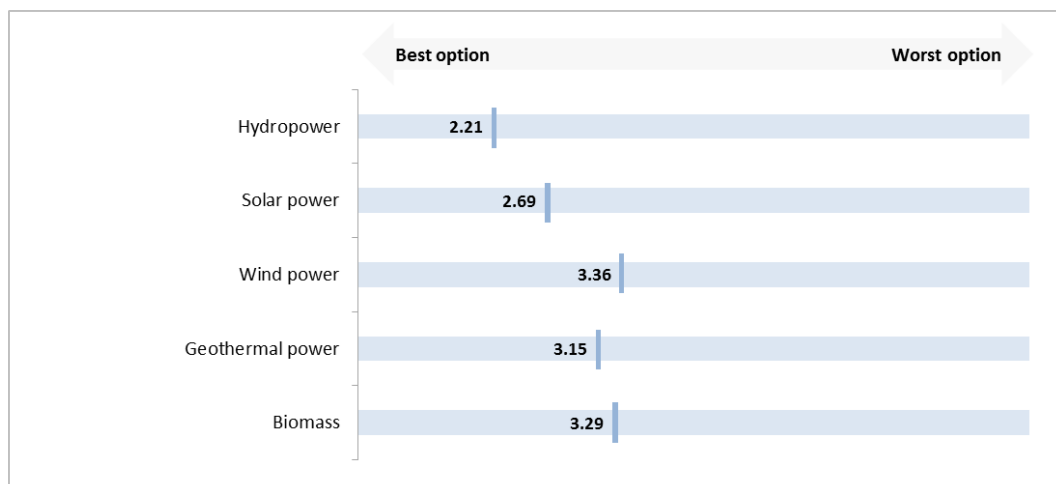
6.19. Finally on sustainability, Panel members were asked for their views on a range of issues relating to sustainable transport (i.e. public transport, cycling and walking).

6.20. The majority of respondents indicated that they would be willing to make regular use of sustainable transport options for a range of journeys (Figure 29). Around two thirds of respondents indicated that they would "definitely" be willing to use sustainable transport for at least one of the listed journey types (64%), and only a little more than 1 in 10 would "definitely not" be willing to do this (13%). This finding was consistent across most socio-demographic groups, but it is notable that Speyside respondents were substantially less likely than others to indicate a willingness to use sustainable transport.

6.21. As Figure 29 indicates, respondents would be most willing to use sustainable transport for *travel to school/education* (40% definitely willing, 15% definitely not) or *travel for shopping/banks/etc* (41% definitely willing, 27% definitely not). It is also notable that most respondents indicated that they would "definitely" or "possibly" be willing to use sustainable transport for *travel to GP/dentist* (65%) or *travel to leisure in the evening* (61%).

6.22. There was some significant variation across geographic areas in respondents' willingness to use sustainable transport, perhaps reflecting differences in journey length and/or availability of public transport services. In particular, those in Elgin were generally more willing to regularly travel by sustainable transport for a range of journey types, while those in the Speyside and Fochabers areas were generally less willing to do this.

Figure 29: Which of the following journeys you would be willing to regularly travel by public transport, cycling or walking?

	Definitely	Possibly	Definitely not	Don't know
Shopping, banks, post offices, etc	41%	30%	27%	2%
Travel to school/education (yourself or children)	40%	29%	15%	16%
Travel to GP, dentist	39%	26%	33%	2%
Travel to work	33%	26%	33%	9%
Travel to hospital	28%	24%	45%	4%
Travel to leisure in evening	24%	37%	35%	5%

6.23. The survey also asked Panel members about any "barriers" that may cause them to rarely or never use sustainable transport. As Figure 30 indicates, the main barriers to use of sustainable transport appear to be *ease of car use* (mentioned by 53%), *inconvenience of bus/train times* (47%), and *walking/cycling being impractical for longer distances* (44%).

6.24. It is interesting to note that only one of these issues is directly related to the standard of public transport provision in Moray, although smaller numbers of respondents also mentioned the relative cost of car and public transport, and a lack of public transport services locally (the latter a particular issue for Speyside respondents). This may suggest that the length and nature of journeys made by individuals may be as much a factor in their preference for car use, as any concerns regarding the standard of public transport services locally.

Figure 30: If you rarely or never use sustainable transport, why is this?

It's easier to use the car	53%
Buses/trains not at convenient times	47%
Too far to walk/cycle	44%
It's cheaper to use the car	31%
No public transport services locally	28%
Journey times are too long	28%
Safety concerns about walking/cycling	19%
Health/fitness issues	13%
Not sure what public transport is available	8%
Other	26%

6.25. As Figure 31 indicates, more frequent and more affordable public transport services are likely to have greatest impact in terms of encouraging greater use of sustainable transport options. Up to around half of respondents indicated that more frequent services (51%) or cheaper fares (45%) would encourage them to use sustainable transport more often, with cheaper fares a particular priority for those aged under 45.

Figure 31: Is there anything that could encourage you to use sustainable transport more often?
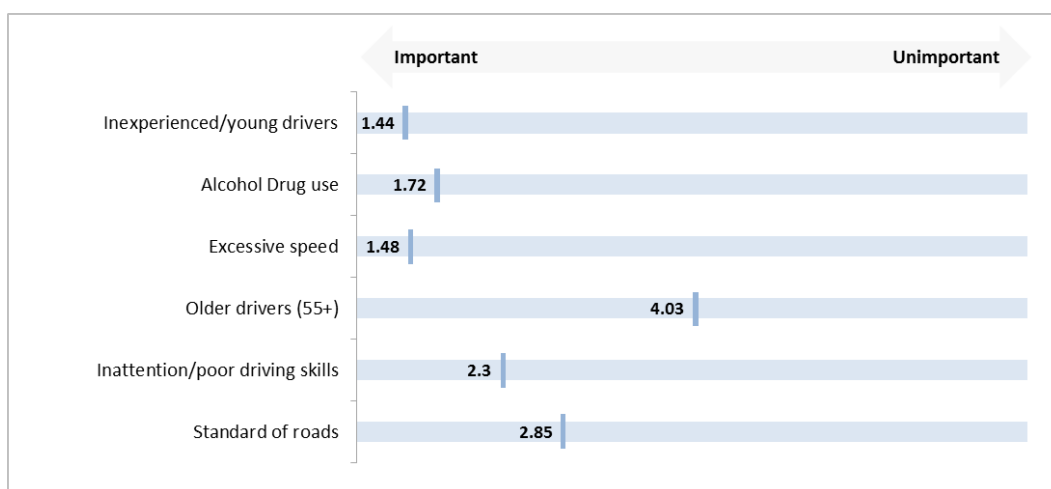
More frequent services	51%
Cheaper fares	45%
More reliable service	31%
More cycle paths	23%
More available timetable information	21%
Better cleanliness of transport	11%
Other	23%

Transport & Infrastructure

6.26. Also in relation to transport in Moray, the survey sought Panel members' views on road safety issues (Figure 32) and potential measures to tackle excessive speed specifically (Figure 33).

6.27. In terms of road safety in Moray *inexperienced/young drivers*, *excessive speed* and *alcohol/drug use* were seen as having the greatest impact on reducing road safety (scores of 1.4, 1.5 and 1.7 respectively). It is notable that these were rated as substantially more important road safety issues than others listed at Figure 32, and older drivers in particular were seen as a relatively unimportant road safety factor (score of 4.0).

Figure 32: Which factors have the greatest adverse impact on road safety in Moray?

	Important	Unimportant
Inexperienced/young drivers	1.44	
Alcohol Drug use	1.72	
Excessive speed	1.48	
Older drivers (55+)	4.03	
Inattention/poor driving skills	2.3	
Standard of roads	2.85	

6.28. In terms of tackling excessive speed specifically, *20mph speed limits in residential areas*, *more use of mobile speed cameras*, *more use of speed indicator signs* and *physical traffic* calming were seen as the most effective approaches. A substantial majority of respondents felt that each of these measures would be "very" or "fairly" effective in tackling excessive speed in Moray (70%, 70%, 67% and 64% respectively). In contrast, views were somewhat divided in relation to *other traffic calming measures* (such as road markings) with an even balance between those who felt this would be an effective ways of tackling excessive speed, and those who felt this would be ineffective.

6.29. Perhaps surprisingly, there were no significant variations across key socio-demographic groups in views on the importance of road safety factors listed at Figure 32, nor in views on the effectiveness of measures to tackle excessive speed at Figure 33.

Figure 33: How effective or ineffective do you think the following measures would be in tackling excessive speed in Moray?

	VERY/FAIRLY EFFECTIVE	Very effective	Fairly effective	Fairly ineffective	Very ineffective	Don't know
More use of mobile speed cameras	**70%**	26%	44%	18%	10%	1%
20 mph speed limits in residential estates	**70%**	31%	39%	23%	6%	1%
More use of speed indicator display signs	**67%**	26%	41%	25%	7%	1%
Physical traffic calming e.g. road humps	**64%**	24%	40%	24%	10%	1%
More publicity on dangers of speeding	**55%**	22%	33%	31%	12%	1%
Other traffic calming e.g. road markings	**48%**	9%	39%	41%	10%	1%

Waste & Recycling

6.30.   Finally in this section, the survey sought Panel members' views on a series of statements relating to waste reduction and recycling (Figure 34).

6.31.   As Figure 34 indicates, an overwhelming majority agreed that *reducing the amount of waste produced* is important for the people of Moray (97% agreeing), and that the *development of recycling services should be a major local priority* (93% agreeing).   It is also notable that most agreed that *people could be persuaded to recycle more with the right kind of encouragement* (83% agreeing).

6.32.   The majority of respondents also agreed that *there is sufficient information to help people to reduce their waste* (80% agreeing, although this was substantially lower for Keith area respondents), but there remained around 1 in 5 who disagreed with this. Moreover, the majority agreed that *publicity and awareness raising campaigns could help change attitudes to waste and recycling* (79% agreeing).

Figure 34: To what extent do you agree or disagree with each of the following statements?

	AGREE	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
Reducing the amount of waste we produce is important for the people of Moray	**97%**	57%	40%	1%	1%	1%
There is sufficient information to help the public in reducing their waste	**80%**	25%	55%	18%	2%	1%
Supporting the development of recycling services should be a major local priority	**93%**	41%	52%	6%	1%	1%
People could be persuaded to recycle more if they were given the right kind of encouragement/support	**83%**	29%	54%	12%	2%	3%
Publicity/awareness raising campaigns could help to change people's attitude to waste and recycling	**79%**	22%	57%	15%	2%	4%

7. EMPLOYABILITY & EMPLOYMENT SKILLS

7.1. In relation to the *Employability and Employment Skills* theme, the survey focused on gauging Panel members' views on the extent to which partners should seek to increase the number of young people going into further education, and potential reasons for fewer of Moray's young people going into further education than is seen in other parts of Scotland.

7.2. Most respondents would like to see some increase in the proportion of Moray's young people going into further education, with more than 4 in 5 suggesting this (82%). However, it is notable that the great majority of these also cautioned that "further education is not right for everyone"; indeed 71% of all respondents suggested this.

7.3. In terms of factors influencing this trend, *lack of aspiration/ambition* and *lack of interest in further education* amongst Moray's children were seen as the main reasons for the smaller proportion of Moray's young people going into further education (mentioned by 47% and 39% respectively). In addition, around a third of respondents suggested that *young people in Moray just prefer paid employment* (35%) and a *lack of availability of college/university courses in Moray* (33%) as factors. It is interesting to note that amongst these top four influencing factors, three relate to young people's attitudes and preferences rather than issues with further education provision.

7.4. It is interesting to note that, while respondents were consistent in their views on whether partners should be working to increase the number of Moray's young people going into further education, there was some variation in views on the factors that contribute to fewer of Moray's young people taking up this option. In particular, Elgin area respondents were significantly more likely than others to feel that lack of employment opportunities was a factor, while those in Keith were most likely to cite a lack of transport or high transport costs.

Figure 35: Do you think we should be working to increase the number of Moray's young people going into further education?

Would definitely like to see more children going into further education	11%
Would like to see some increase - but further education is not right for everyone	71%
No, there is no problem with the current situation	11%
Don't know/can't say	7%

Figure 36: Why do you think fewer young people leaving school in Moray go into further education than children elsewhere in Scotland?

Lack of aspiration/ambition amongst children in Moray	47%
Lack of interest in further education amongst young people in Moray	39%
Young people in Moray just prefer paid employment	35%
Lack of availability of college or university courses in Moray	33%
Further education unlikely to help young people in Moray improve their quality of life	22%
Lower pupil attainment in Moray than elsewhere in Scotland	12%
Other	22%

8.   PARTNERSHIP WORKING

8.1.   The final section of the survey related to *Partnership Working*. While not a specific theme of Moray's Single Outcome Agreement, partnership working is clearly an important aspect in terms of delivery of local outcomes. In this context, the survey focused on Panel members' views on how the Community Planning Partnership should communicate with local communities, and the extent of individuals' interest in giving their views and helping to tackle local issues.

8.2.   In terms of the Partnership communicating with local communities, *leaflets and posters in public spaces* (libraries, GP surgeries, etc) was by some margin the most common suggestion (by 71%). This suggests that Panel members continue to see a significant role for printed material in terms of how the Partnership communicates with residents. However, it is interesting to note that web-based communication methods were also highlighted by a substantial proportion of respondents, in particular, use of *local websites* (suggested by 45%), *social networking* (37%) and *email mailing lists* (26%).

8.3.   There was some significant variation across socio-demographic groups in views on how the Partnership should communicate with local communities, particularly in relation to age and location. In terms of age, there was significantly stronger interest in communication via *social networking* and *local websites* amongst under 45s (although *leaflets* were still the most commonly preferred option). In contrast the preference amongst those aged 65+ was generally for *leaflets or posters*, although up to around a third of older people also suggested online communication. In terms of area, Keith area respondents showed a stronger interest in local websites than those in other areas.

Figure 37: Are there ways of communicating with local communities that you would like the Partnership to use?

Leaflets/posters elsewhere (e.g. libraries, GP surgery, public spaces)	71%
Local websites (www.yourmoray.org.uk, Council website etc)	45%
Social networking (Facebook, Twitter)	37%
Email mailing list	26%
Leaflets/posters in local Council offices	23%
Text updates	10%
Other	14%

8.4. Nearly half of respondents indicated that they had done, or would be interested in giving their views or helping to tackle local issues (Figure 38 over the page). A total of 45% indicated this, including 15% who have done this previously (note that this does not include giving views through the Citizens' Panel).

8.5. In terms of how individuals would like to give their views or help to tackle local issues, *taking part in surveys* was by far the most widely preferred option (77%); perhaps unsurprising given this is the primary mode of consultation for the Citizens' Panel. In terms of other means of consultation and engagement, *local meetings or discussion groups* (32%) and *local residents or other community groups* (23%) were also notable suggestions.

Figure 38: Aside from the Citizens' Panel, have you or would you be interested in giving your views or contributing in any other r way to tackling issues in Moray?

Yes, have done this	15%
Have not done this, but would be interested	30%
No, not interested in this	42%
Don't know/ Can't say	14%

Figure 39: If you would be interested in giving your views or helping to tackle local issues, how might you prefer to do this?

Taking part in surveys	77%
Local meetings or discussion groups on specific community safety issues	32%
Local residents or other community group	23%
Community Council	20%
Other (e.g. via local website, social networking, via text or phone)	18%
Speaking to local Community Wardens	15%
Other	10%