

Moray Citizens' Panel
Survey 2: Travel and Transport

Draft Report

by

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EXECUTIVE SUMMARY

The survey was issued to all members of the Moray Citizens Panel in March 2006. By late April the survey attracted 1002 responses which represents a response rate of 77% which is an exceptionally high level of response.

Existing Travel Habits

The car was by far the most dominant mode of transport used by respondents for journeys related to work, main grocery and non grocery shopping and for recreational activities. For each type of activity car was used by around 4 in 5 or more. Only 1 in 10 respondents walked for any of these activities and only 1 in 20 took public transport.

Over 4 in 5 travel more than 5 miles one way for their main grocery shopping and 1 in 3 travel more than 11 miles with those living in the Speyside and to a lesser extent Keith and Buckie areas likely to travel the longest distances.

Car ownership is high with 9 in 10 households having access to at least one car; only 1 in 10 do not. This is higher than car ownership in Moray as a whole where it is known that just over 8 in 10 households have a car.

The vast majority see their car as being 'very important' to them, although less so in the Elgin area. The typical monthly amount spent on fuel varies widely although 1 in 4 spend over £100 per month.

Public Transport

The vast majority of Panel members live within 1 mile of a bus stop although 1 in 10 live 3 or more miles away. Those living in the Speyside and Keith areas tend to live further away than in other areas.

The majority of residents in the Elgin and Forres areas report living within 2 miles of a rail station but in other areas the majority do not including in the Keith area.

The use of public transport is infrequent with very few using it daily and only 1 in 10 saying they use it at least once per week. Over 2 in 5 report never using public transport, not even now and again.

The availability of travel concessions, especially among the over 60s, is the most common motivating factor to use public transport followed by being less stressful than driving. In order to address difficulties in using public transport having more bus stops or rail stations near their home was the most commonly mentioned solutions.

It is only in the case of occasional longer distance journeys that the majority people would consider using public transport. For other journey types such as town centre shopping, visits to health and public services and in particular supermarket shopping those unlikely to use public transport, even if appropriate services were available, far outnumber those who would not consider it.

The introduction of more affordable fares, better service integration, more frequent bus services and better routing bus services were the most commonly cited improvements that could be made to encourage greater public transport use.

The majority of Panel members had never heard of the Fair Travel Scheme or the Access Moray Card although a substantial minority (2 in 5) had heard at least something about it. Only 1 in 10 felt that they knew a lot about it. The majority view was that the Scheme/Card was important although over 1 in 3 felt that they could not comment.

Travel to Work, School and College

The distances travelled to work vary considerably among respondents although over 1 in 3 travel over 40 miles per day there and back. Respondents in Speyside, Keith and Buckie areas tend to travel longer distances and those in the Elgin and Lossiemouth areas shorter distances. Very few people find their journey to work too far.

The (in)frequency of bus services and the lack of an appropriate services were the most commonly mentioned barriers to using public transport to work and to a lesser extent the cost of such services. For 2 in 5 respondents having to have a car for their work and public transport not suiting the hours of their work are important.

Very few currently take part in car sharing arrangements (only 6% of respondents) although almost half would consider doing so. Having a work colleague living nearby was by far the most likely motivating factor to consider such arrangements while there was considerably less interest in more formal arrangements including financial incentives which were potentially attractive to only 1 in 4.

The most common form of travelling to school or college is to walk (by 2 in 5) followed by the school bus (1 in 4) and by car (1 in 5). Very few cycle or take public transport. For secondary school children the school bus is more common carrying over 2 in 5 pupils.

The profile of transport modes used varies considerably by area across Moray for example relatively more are likely to walk in the Lossiemouth area, to take the school bus in the Fochabers area and to get there by car in the Forres and Buckie areas compared to Moray as a whole.

1 in 2 of those whose children do not walk or cycle felt that nothing could be done to encourage them to do so. Walking /cycling buses, the influence of friends and more traffic calming measures were possible incentives identified but not enthusiastically so.

There are concerns regarding pupil safety when walking or cycling with a high level of support for car free zones and speed restrictions around schools. These are considered to be much more important than for example more school buses.

The lack of availability of public transport services, their infrequency and the cost of such services were considered a barrier to accessing Moray College by between 1 in 4 and 1 in 5 respondents.

Parking

The majority (2 in 3) are satisfied with current parking provision in Moray although more are satisfied with 'off street' rather than 'on street' facilities.

It is when visiting hospital that the most severe car parking problems are encountered while in comparison most find town centre parking easy, although many would like to see provision further improved.

There is considerable support for local parking regulations and for more strict enforcement of these as many feel they are currently being abused.

Road Safety and Drink Driving

Improvements to the standard of existing roads is by far regarded as the most important measure that could be taken to improve road safety. More restricted speed areas and pedestrian zones were the next most popular but considerably less so.

The vast majority of Panel members think that the drink driving limit is less than it actually is. Notwithstanding this over 1 in 2 Panel members would like to see the limit reduced to zero. Views are split as to whether Moray has more or of a drink driving problem than elsewhere, although very few believe that it less of a problem. However a majority feel that not enough is known about the scale of the issue in Moray.

The vast majority would report anyone they knew to be drink driving and even where they suspected this to be the case, although somewhat less so. Lenient sentencing was regarded as the biggest contributory factor undermining the effectiveness of anti drink driving campaigns.

Outdoor Access, Transport and the Environment

Almost everyone had heard of the Speyside Way although it was only those in the Speyside and Fochabers areas that were likely to know a lot about it. Most had always known about it or heard about it through others – few had heard about it through publicity, internet or the visitor's centre.

Most had not heard about the Moray Core Paths Plan. In terms of selecting core paths people felt that it was most important to focus on routes used by local people and those linking communities. While those used by tourist were also considered important this was to a lesser extent.

Views on possible measures to reduce the environmental impact of transport were very much assessed by respondents in terms of their potential impact. Using rail rather than road for goods distribution and making more use of local producers were by far the most popular in terms of positive impact and being a good idea.

Integrating transport with the planning process and the provision of more cycle and walkways were also popular. The introduction of car charging in cities was the least popular of the measures listed in the survey.

Improvements to local travel information were more likely to be considered a good idea than necessarily having a great impact.

Very few respondents had used alternative forms of transport to their car in the past year for travelling to work, shop or for recreation – indeed considerably less than 1 in 10 had done so. Almost 9 in 10 had never taken public transport to work and 2 in 3 had never done so for either shopping or leisure. 1 in 4 reported ‘occasionally’ using public transport instead of their car but only in relation to shopping and leisure activities.

In order to encourage greater use of cycling the most popular suggestion was the creation of more cycle lanes/paths but preferably segregated from main traffic. 1 in 3 feel that nothing can be done to increase use as far as they are concerned.

Overall Views

When presented with a range of views about transport and travel in Moray the most strongly felt by a substantial majority of Panel members (3 in 5 or more) were that:

- Road links to Inverness and Aberdeen are poor
- It is easy to get a taxi in Moray
- Road maintenance of minor roads in Moray had not improved in recent years
- There were poor road links to the South of Scotland.

In terms of future investment priorities for the Council the most popular in rank order were:

- 1 The maintenance of existing roads and parking facilities
- 2 Ensuring that improved road and rail links out of Moray are included in Scottish Executive investment plans
- 3 The development of new roads and parking facilities
- 4 The improvement of local public transport services.

1. INTRODUCTION

Background and Study Objectives

- 1.1. The Moray Citizens' Panel was established by the Moray Community Planning Partnership (MCP) during April and May 2005, and the MCP are also responsible for the ongoing management of the Panel. Current MCP members are:
- The Moray Council;
 - Communities Scotland;
 - Grampian Fire and Rescue;
 - Grampian Police;
 - NHS Grampian;
 - Highlands and Islands Moray (formerly Moray Badenoch and Strathspey Enterprise);
 - Joint Community Councils;
 - Moray Citizens Advice Bureau;
 - Moray Chamber of Commerce;
 - Moray College;
 - Moray Volunteer Service Organisation;
 - Royal Air Force; and
 - The Volunteer Centre Moray.
- 1.2. A total of 1329 Moray residents joined the Panel as a result of the recruitment process. There have been a small number of deletions since the initial recruitment; at the time of the survey the total Panel membership stood at 1294, spread across each of the seven main administrative areas:
- Buckie;
 - Elgin;
 - Fochabers;
 - Forres;
 - Keith;
 - Lossiemouth; and
 - Speyside.
- 1.3. As a result of responses to this survey, current Panel membership has reduced slightly to 1273 (21 deletions).

Methodology

- 1.4. Craigforth Consultancy and Research undertook this survey on behalf of Moray Community Planning Partnership during March and April 2006. The survey was issued to the full sample of Panel members; postal self-completion questionnaires were issued to all 1294 members in the week beginning 13 March 2006. Reminder letters were sent to all non-respondents in the week beginning 3 April 2006.

1.5. The aim of the survey was to gauge Panel members' experience of and views on a range of travel and transport issues. In particular, the following areas were explored:

- Panel members' travel habits;
- Public transport facilities in Moray;
- Travel to work, training and school;
- Parking facilities in Moray;
- Drink driving and road safety;
- Outdoor access; and
- Transport and the environment.

1.6. A copy of the questionnaire used in the survey is provided at Appendix 1 to this report.

Response

1.7. A total of 1002 returns were received by cut off in late April 2006, representing an overall survey response rate of 77%¹. This is a very good level of response, and is similar to that achieved in the first survey. In addition, the response rate compares extremely favourably with other postal survey exercises.

1.8. The profile of survey respondents in terms of gender, age, housing tenure and administrative area is provided in Table 1 below.

1.9. The achieved sample was broadly representative of the Panel as a whole in terms of the five main indicators presented. Any under or over representation of specific sectors of the wider Moray population were due to differences in the profile of the wider population and that of the current Panel. The most notable differences were:

- There was a small over-representation of females in the achieved sample, and corresponding under-representation of males;
- Those in the middle to older age groups are over-represented, particularly those aged 45-59. In contrast, there was a significant under-representation of those aged under 30;
- Owners are significantly over-represented, and households in social rented and private rented/other accommodation correspondingly under-represented; and
- The Panel was constructed to maintain a relatively even number of members across the seven geographic areas in order to produce robust survey findings at a sub local authority level. This results in an over-representation of Speyside area residents under-representation of Elgin residents in relation to their share of Moray's population.

¹ Analysis presented in this report is based on 982 analysable responses received by the survey cut-off date, representing a response rate of 76%.

Table 1: Profile of Survey Respondents, Panel Members and Moray overall

	Survey Respondents (Total 982)		Panel Members (Total 1294)		Moray ²
	Num	%	Num	%	%
GENDER					
Male	436	44%	587	45%	50%
Female	546	56%	707	55%	50%
BASE	982		1294		-
AGE					
18-30	54	6%	105	8%	16%
30-44	269	28%	385	30%	29%
45-59	353	36%	452	35%	26%
60+	302	31%	346	27%	29%
BASE	978		1288		-
HOUSING TENURE					
Owner occupied	796	81%	1008	78%	65%
Social rented	106	11%	161	13%	21%
Private rented/ Other	76	8%	118	9%	14%
BASE	978		1287		-
GEOGRAPHIC AREA					
Buckie	114	12%	151	12%	16%
Elgin	116	12%	151	12%	24%
Fochabers	148	15%	188	15%	11%
Forres	157	16%	216	17%	18%
Keith	132	13%	178	14%	8%
Lossiemouth	126	13%	172	13%	14%
Speyside	189	19%	238	18%	9%
BASE	982		1294		-

Reporting Conventions

- 1.10. In the analysis we have focused on the questions asked in the survey form. Overall frequency counts and percentages are presented for each question, with the exception of open-ended questions where the main issues and suggestions are highlighted in the text of the report. Additional tables with data on questions not presented in tabulated form within the main report are included at Appendix 2.

² Gender and age based on GRO(S) population estimates as at 30 June 2004; housing tenure based on the 2001 Census; geographic area based on the 2004 Moray Community Health Index (therefore not directly comparable to 2001 Census or GRO(S) population estimates).

- 1.11. We also conducted crosstabulations of some questions by key demographic indicators, including gender, age and the residential location of respondents (based on the seven community planning areas in Moray). These variables offer helpful ways of understanding the survey data in greater detail and where significant differences between these groups were evident, these are highlighted in the report text.
- 1.12. However, because of the relatively low sample numbers in some of the categories being used we must be cautious about generalising from some of the crosstabulated data. Overall numbers of respondents are sufficiently high to provide reliable analysis, and crosstabulations are only presented and reported on where numbers are high enough to ensure that results are reasonably robust.
- 1.13. Similarly, where the base number of responses is less than 30, percentage values are not provided. Where appropriate, the missing value is replaced by “*” throughout the report. Where presented, percentage values are rounded up or down to the nearest whole number. Consequently, for some questions this means that percentages may not sum to 100%.

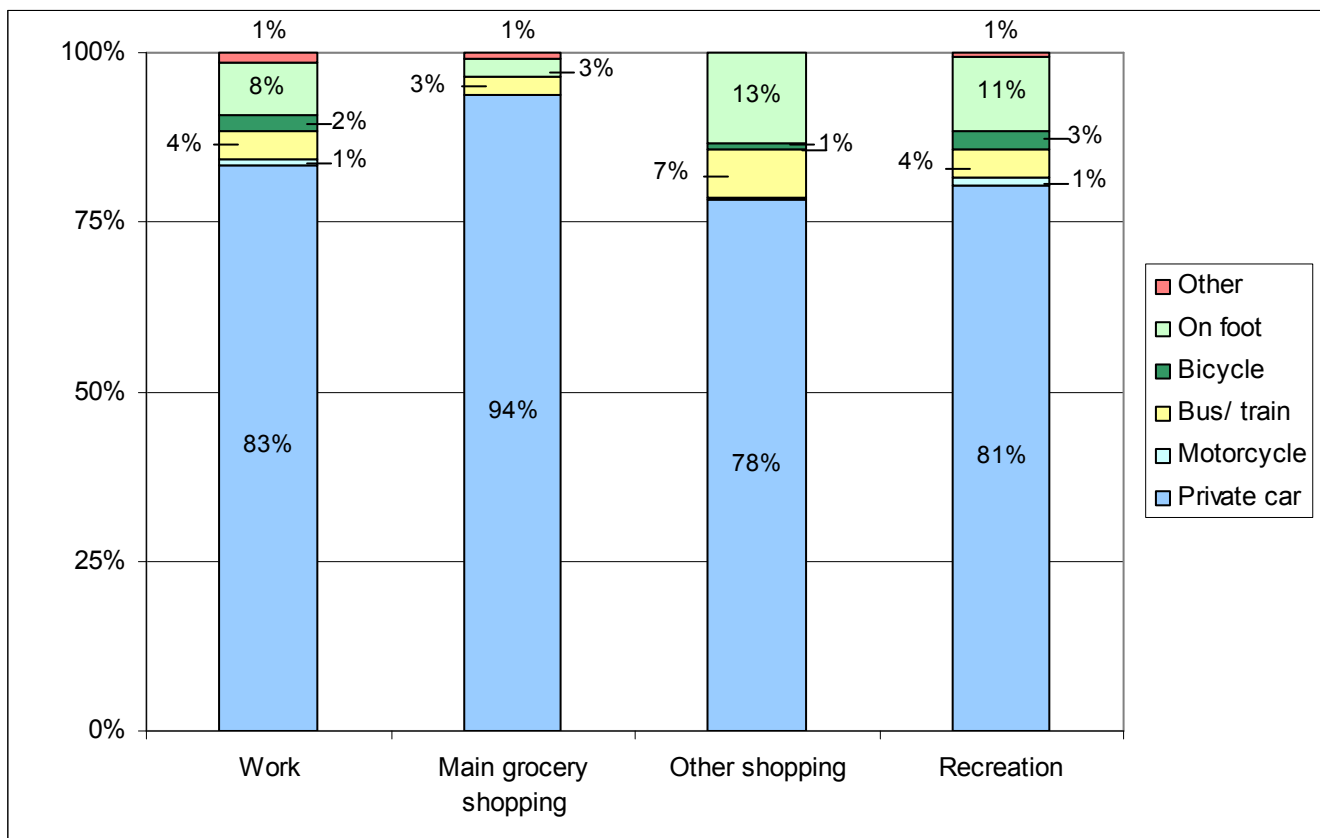
2. TRAVEL HABITS

- 2.1. Firstly respondents were asked a series of questions relating to their use of transport services for a range of journeys e.g. to work, to shop etc and supplementary questions on use of a private car and travel for main grocery shopping.

Modes of Transport Used

- 2.2. First respondents were asked about the mode of transport that they *normally* used for travel to work, grocery shopping, other shopping and recreation (Figure 1).
- 2.3. Unsurprisingly, private car was by far the most commonly used mode of transport for all types of journey; around 4 in 5 normally used a car to travel for work (83%), non grocery shopping (78%) and recreation (81%). Car use was most common for main grocery shopping, with more than 9 in 10 normally using a car for this.
- 2.4. In terms of other forms of transport, walking and public transport (bus or train) were the most common but much less so. Nearly 1 in 10 respondents normally walked to work and just under 1 in 20 took public transport. Very few walked or used public transport for their main grocery shopping, but these modes were more common for other shopping; nearly 1 in 8 travelled to other shopping on foot and just over 1 in 20 took public transport. Walking was the second most common mode used for accessing leisure and recreation activity by just over 1 in 10.

Figure 1: Mode of transport normally used for work, shopping, recreation



- 2.5. Although private car was the primary mode of transport across all demographic groups - particularly for main grocery shopping - a number of significant variations in transport use were evident:
- Elgin, and to some extent Buckie area respondents were less likely than others to use a car for work, non-grocery shopping and recreation. For example, just over 7 in 10 of those in the Elgin area normally travel to work by car, compared to more than 9 in 10 in the more rural areas of Fochabers and Speyside.
 - Elgin area respondents were also much more likely than others to travel on foot; these respondents were twice as likely to walk to work than those in the Forres, Speyside, Fochabers and Lossiemouth areas.
 - Older respondents (aged 60+) were less likely than others to use a private car, particularly to access non-grocery shopping and recreation facilities. Although this age group were somewhat more likely than younger respondents to walk for these services, the lower level of car use appears to be associated primarily with a greater use of public transport. Over 60s were typically 2-3 times more likely than others to use bus or train to access shopping and recreation facilities.
 - There were very few variations in transport usage by gender. It is notable that female respondents were less likely than males to use car to access non-grocery shopping, and correspondingly more likely to use bus or train. It is also interesting that females were more than twice as likely as males to travel by car as passengers.

Distance Travelled for Main Grocery Shopping

- 2.6. As shown below the vast majority of Moray residents (over 4 in 5) travel more than 5 miles to do their main grocery shopping and indeed over 1 in 3 travel more than 11 miles with 1 in 10 travelling more than 20 miles.

Table 2: Distance travelled for main grocery shopping

	Num	%
Don't travel for shopping (eg shop online/from home)	18	2%
Under a mile	135	14%
1 to 5 miles	217	22%
6 to 10 miles	269	28%
11 to 20 miles	236	24%
More than 20 miles	101	10%
Don't know/ can't say	0	0%
BASE	976	

- 2.7. There was substantial differences in the profile of responses depending on what area respondents came from:
- Only in the Elgin and Forres areas do the majority of people travel less than 5 miles to do their main grocery shopping – 96% and 68% respectively;
 - In the Fochabers and Lossiemouth areas the most common travel distance is 6-10 miles – 67% and 76% respectively;
 - In the Speyside area over 4 in 5 (84%) travel over 11 miles; with 2 in 5 (38%) travelling distances of 20 miles or more;
 - Substantial numbers in the Keith and Buckie areas also travel over 11 miles – 46% and 55% respectively.

Private Cars

- 2.8. Car ownership was high amongst respondents; the great majority indicated that there was a car available for use in their household - nearly 9 in 10 (87%); only just over 1 in 10 (13%) did not have a car at their disposal. Moreover, as many as 1 in 3 respondents indicated that there were two or more cars in their household (33%).

Table 3: Number of cars, importance of car, monthly fuel cost for car

	Num	%
Number of cars in household		
None	128	13%
One	521	53%
Two	288	29%
Three or more	42	4%
BASE	979	
How important is car for household?		
Very important	767	79%
Fairly important	123	13%
Neither/ nor	24	2%
Fairly unimportant	8	1%
Very unimportant	36	4%
Don't know/ Can't say	7	1%
BASE	965	
Monthly household spend on fuel for cars		
£0 - £25	88	9%
£25 - £50	226	24%
£50 - £75	210	22%
£75 - £100	183	19%
£100+	216	23%
Don't know/ can't say	24	3%
BASE	947	

- 2.9. This is not too dissimilar in profile to the findings of the Scottish Household Survey in 2003/04 when it was found that in Moray 18% had no car while only 25% had 2 cars, the other figures being the same. This is likely to be consistent with the under representation of lower income social rented Sector tenants on the Panel.
- 2.10. As in the case of other age groups the majority of over 60 households (76%) have a car but car ownership tends to be lower than in the case of under 45s and 45-59s (both over 90% ownership). 1 in 4 over 60 households do not have a car and are much less likely to have two or more. Only 17% of over 60 households have 2 or more cars compared to 40% or more in the other age groups.
- 2.11. For the vast majority of respondents (79%) their car is considered to be 'very important to their household with very few reporting that it was unimportant (5%). There are no significant variations by gender or by age in how important cars are considered.
- 2.12. In almost all areas the vast majority of respondents felt that their car was 'very important' to them; this range from 74% of respondents in Buckie to 89% in the case of Speyside. Only in the Elgin area was there a substantial difference with 60% saying that their car was 'very' important but with 26% saying that it was only 'fairly important'.
- 2.13. As shown in the above table the amount spent on fuel varied quite considerably across Moray. Less than 1 in 10 spent fewer than £25 per month, although 1 in 4 spent over £100 per month, with similar proportions spending the banded amounts in between these extremes.
- 2.14. There are some variations in the pattern of amount spent on fuel between different areas but perhaps not to the extent that may have been expected. In all areas for example only a minority of households spend under £50 per month. However people are less likely to spend over £100 per month of the live in the Elgin area with only 12% doing so; on the other hand this increases to a high of 33% in the Speyside area.

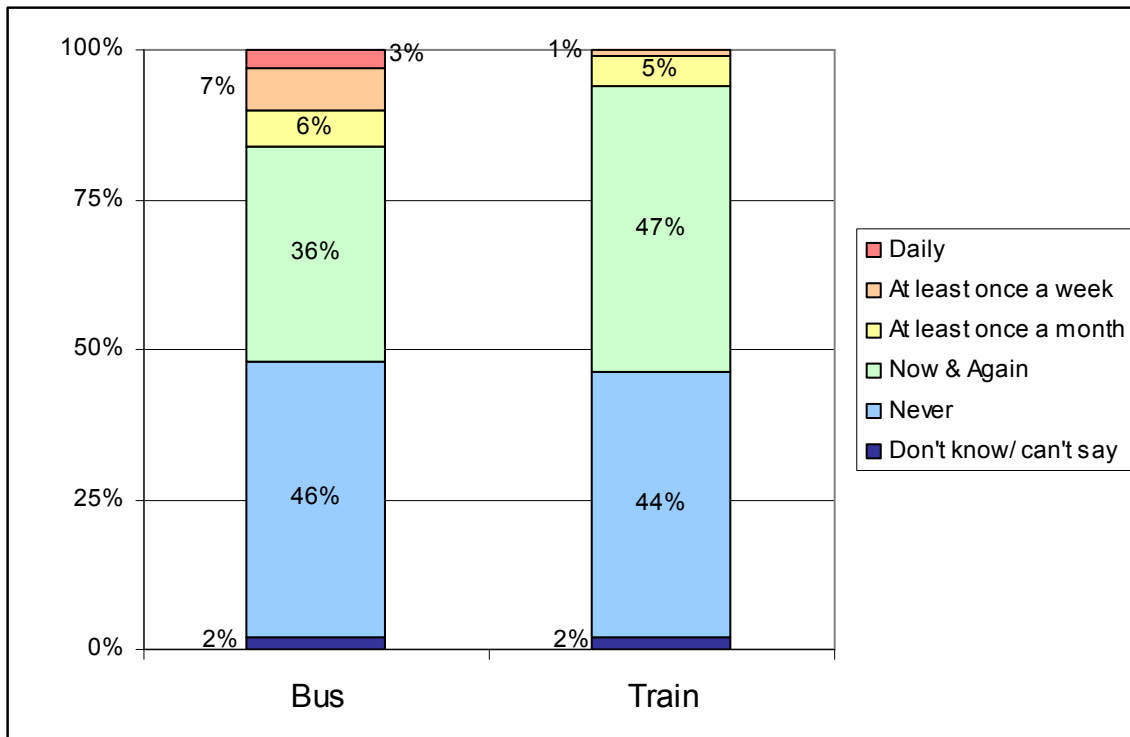
3. PUBLIC TRANSPORT

- 3.1. Respondents were then asked a series of questions about their use of and access to public transport facilities.
- 3.2. 4 in 5 respondents live within 1 mile of their nearest bus stop; 1 in 10 live 3 or more miles from one. Over 2 in 3 live more than 5 miles away from their nearest train station and over 4 in 5 live 5 or more miles from their nearest main bus station.
- 3.3. Proximity to the nearest bus stop is less than 1 mile for the majority of residents with levels highest in Elgin, Buckie, Lossiemouth at around 90% or more. However access is notably more difficult in the Speyside and Keith areas where only around 60% are within such a distance. Over 20% of respondents in these latter areas report being 5 or more miles from their nearest stop.
- 3.4. Only in the Elgin area is access to a main bus station within easy reach while this applies to rail services too with almost 9 in 10 (86%) reporting being within 2 miles of a rail station. Residents in the Forres and Keith areas also report a significant proportion being within 2 miles of a train station but not to the same extent (67% and 46% respectively). This is likely to reflect the greater geographical spread of the population in these areas compared to Elgin. In the Buckie, Fochabers and Speyside areas almost all people are 5 or more miles from a train station.

Table 4: Distance to bus and train stops/ stations

	Less than 1 mile	1-2 miles	3-4 miles	5 or more miles
The nearest bus stop	79%	10%	5%	6%
The nearest main bus station	5%	10%	2%	82%
The nearest train station	10%	17%	4%	68%

- 3.5. Among Panel members use of public transport is infrequent. Very few use it daily and only 1 in 10 use it at least once a week. In most cases buses rather than trains are used. However a substantial minority use bus or train services at least 'now and again' with over 1 in 3 (36%) using the bus this way and almost 1 in 2 using the train this way (47%). However well over 40% never use a bus nor a train.
- 3.6. Those living in the Elgin and Lossiemouth areas are less likely to say they never use public transport while those in Speyside are more likely to say this. However there is little difference among the proportions using it frequently. For example those in the Elgin area with most access to public transport services do not report significantly higher levels of regular usage. (It must be borne in mind that only 13% of respondents overall reported not having a car).

Figure 2: Frequency of use of public transport in past 12 months

- 3.7. In terms of identifying reasons why people might want to use public transport, the availability of travel concessions (for older and disabled people) and being less stressful than driving are the most commonly cited - each selected by around 2 in 5 respondents. Having no access to a car (for the majority this will only be at times) and saving money are the next most common mentioned by around 1 in 4. Less than 1 in 5 report environmental concerns as being a motivating factor for public transport use.

Table 5: Motivations for using public transport

	Num	%
No access to private car	200	27%
It is cheaper than running a car	185	25%
No driving licence	82	11%
It is less stressful than driving	272	36%
It is quicker than other forms of transport	61	8%
Eligible for travel concession	287	38%
Environmental concerns	135	18%
Other	128	17%
BASE	747	

- 3.8. Those who answered 'other' in this question tended to mention existing barriers to using public transport that would need to be overcome. In the main these related to poor frequency, timing and routing of services, poor integration between bus and rail travel, difficulties getting on and off buses (e.g. disabled, young mum's with more than one child etc) as inadequate storage spaces on board.

- 3.9. Over 60s are likely to be motivated by the availability of travel concessions with 78% citing this as a reason but they are also likely to be motivated by cost considerations with 36% seeing public transport as a cheaper option. Under 45s are much less likely to be motivated by cost with only 16% seeing public transport being cheaper as a reason to use bus or train services.
- 3.10. For the vast majority there are no physical barriers to being able to access public transport. Only 1 in 10 at most report difficulties in getting on and off public transport and these will be older or disabled people with mobility problems. While distance from facilities is a more significant barrier, around 7 in 10 (69%) do not see this as a difficulty.

Table 6: Difficulty using public transport

	YOURSELF		SOMEONE ELSE		No difficulty
	Great difficulty	Some difficulty	Great difficulty	Some difficulty	
Getting on/off buses	2%	8%	4%	5%	83%
Getting on/off train	2%	6%	4%	5%	86%
Getting to/ accessing bus	7%	10%	7%	8%	78%
Getting to/ accessing bus or train stations	10%	15%	10%	10%	69%

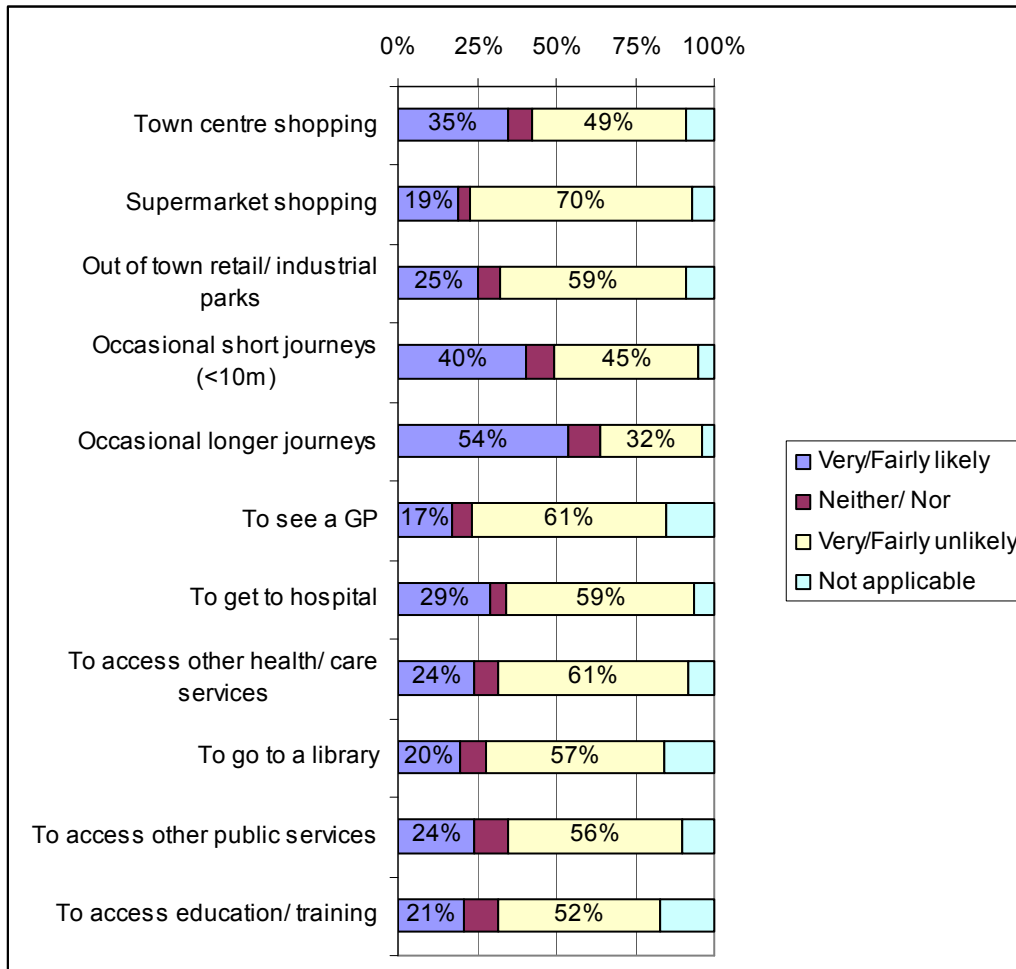
- 3.11. Those that reported any difficulty in the previous question were then invited to consider what could be done to address these difficulties (although some who reported having no difficulties also answered). By far the most popular solutions suggested were to have train stations and bus stops nearer to their home mentioned by 50% and 41% of respondents respectively. Improving forms of disabled access both at stations and on buses or trains were also selected by 20-30% of respondents as was the extension of the existing dial-a-bus scheme. Over 60s were more likely to be keen on seeing improved disabled access on buses in particular.

Table 7: Solutions to difficulty using public transport

	Num	%
Bus stops/ stations closer to your home	133	41%
Train stations closer to your home	164	50%
Better disabled access to bus and train stations	66	20%
Better disabled access to buses (eg lower floors, ramps)	94	29%
Better disabled access to trains (eg pull out ramps)	76	23%
More space on buses/ trains for wheelchairs and walking aids	60	18%
Extension of the dial-a-bus scheme	65	20%
Other	42	13%
BASE	328	

- 3.12. Panel members were next asked what kind of journeys they might consider making by public transport on the proviso that sufficient bus and train services were available.

- 3.13. Notwithstanding the wide range of types of journey provided for people to respond to (11 in total) in only one case did the number of people likely to use public transport outnumber those who were unlikely to. It is only in the case of occasional longer distance journeys that public transport seems attractive to a majority (remembering the proviso of sufficient services being available) with over half (54%) saying that they would consider this. Occasional shorter trips of under 10 miles by public transport was the next most common as a possibility, mentioned by 2 in 5 (40%). In both cases however they thought it 'fairly' rather than 'very' likely that they would use public transport in these instances.
- 3.14. Supermarket shopping is the type of journey where people are least likely to consider using public transport with 70% saying it is unlikely and most of these saying it is 'very unlikely'; only 19% would consider such a journey. Interestingly those living in the Elgin and Forres areas – those with major supermarkets – are even less likely than others to consider it.
- 3.15. Around 3 in 5 (around 60%) or more would be unlikely to use public transport to access health services – be it GPs, hospital or other health/care services – nor services such as libraries, public services etc .
- 3.16. Around half (49%) of respondents also thought it unlikely they would use public transport for town centre shopping, although 1 in 3 (35%) thought it likely although again more 'fairly' than 'very'. Again it is interesting to note that those living in Elgin and Forres where there are the best developed town centre shopping facilities would be less likely than others to use a bus or train for such shopping.
- 3.17. Interestingly it is those in the Speyside area, who are most likely to say currently that they never use public transport, who show most interest in the prospect of using it for different types of journey. For example almost half (46%) in this area said they would be likely to consider it for town centre shopping with over half of these saying that they would be 'very likely' to do so.
- 3.18. The response profile to this question underlines the difficulties faced by UK, Scottish and local governments, transport agencies and providers in adapting the public's dependence on cars over buses and trains particularly in predominantly rural areas such as Moray.
- 3.19. While over 60s are more likely to consider future use of the bus or train for some trips such as town centre shopping, supermarket shopping and visits to hospital for example, it perhaps underlines the nature of the policy challenge ahead that it's the under 45s who are least likely to consider use of public transport for most of the journey types mentioned.

Figure 3 : Likelihood of using public transport for specific types of journey

- 3.20. Respondents were then asked to consider what could be done to encourage them to make greater use of public transport services – again a wide range of options was presented for their consideration.
- 3.21. The most commonly selected incentives to make more use of public transport and each mentioned by around 2 in 5 respondents were:
- more affordable fares
 - better integration of public transport services
 - more frequent bus services
 - more convenient/better routed services.

Table 8: Changes which would encourage greater use of public transport

	Num	%
More frequent bus services	380	40%
More frequent train services	125	13%
More reliable public transport services	248	26%
More convenient services (ie along the routes that you are interested in)	346	37%
More affordable fares	409	43%
Better integration of public transport services (ie bus and train times linked)	383	41%
More bus stops along routes	104	11%
More buses/ trains in evenings/ weekends	325	34%
More accessible bus and train stops/ stations (eg more footpaths)	94	10%
More through-ticketing	121	13%
Extension of the dial-a-bus scheme	99	10%
More buses with lower floors to enable access for older people and young children	144	15%
Better disabled access to buses/ trains and their stations	109	12%
Better public transport information	294	31%
Better safety on buses/ trains and their stations (eg CCTV, better lighting)	182	19%
Buses fitted with seatbelts	146	15%
Buses/ trains with more storage space	186	20%
Other	65	7%
Nothing	147	16%
BASE	945	

- 3.22. The next most common were greater frequency of service at night/weekend and better information on services each mentioned by around 1 in 3 and more reliable services mentioned by 1 in 4. Under 45s were considerably more likely to mention more affordable fares as a potential encouragement than other age groups.
- 3.23. It should be noted that again few people were likely to select options that were associated with access to public transport with only 1 in 10 choosing for example more bus stops along routes or more accessible bus stops or stations.
- 3.24. Finally 1 in 6 respondents (16%) felt that nothing could be done to encourage them to use public transport.
- 3.25. When asked which of the proposed changes would be the most important in encouraging use of public transport the answers given were very diverse. However the most commonly mentioned were consistent with those previously – more affordable fares, more frequent bus services and more convenient/better routed services. Although not among those regarded as the most important or second most important, access to better information on public transport was the most commonly selected third most important.

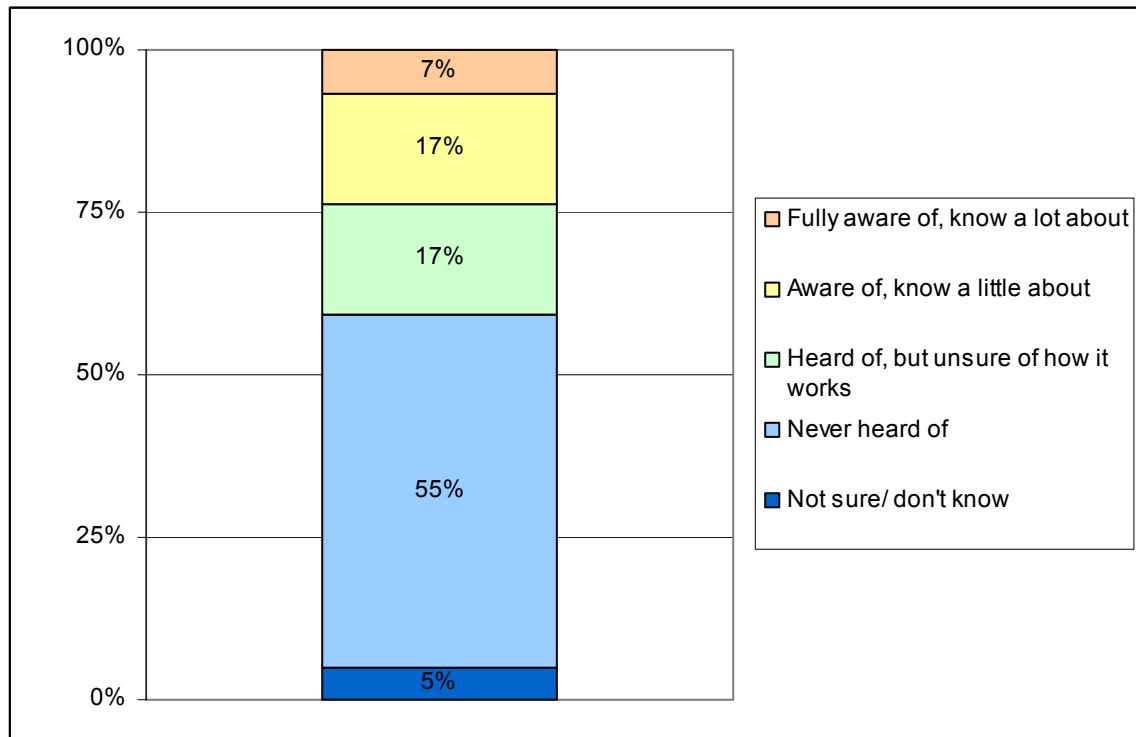
- 3.26. When asked where they would like to be able to access information on public transport services most options were each selected by just under half of respondents suggesting no unanimous view about what's best or most preferred. The ability to access such information by phone, online, through leaflets that are widely available including beyond bus and train stations and through direct contact at bus or train stations are all considered equally important.
- 3.27. Not surprisingly over 60s are considerably less than likely to prefer to access such information through online/e mail services with only 25% selecting this method compared to over 50% in the case of both 45-59s and under 45s. However even among these younger groups there was a lot of support for other forms of access too.

Table 9: Preferred points of access for information on public transport services

	Num	%
Speaking to a person at a bus or train station	451	48%
Leaflets available at bus/ train stations	442	47%
Leaflets available in other public places (eg Council offices, libraries)	467	49%
By telephone	452	48%
Online or by email	439	46%
By text message	39	4%
Other	31	3%
BASE	948	

Fair Travel Scheme

- 3.28. The Access Moray Card was introduced in early 2005 at Forres Academy and then rolled out to other secondary schools. It offers a range of services including a Fair Travel scheme which enables young people to travel to and access recreation facilities at lower fares. With the introduction of nation wide free transport for all older and disabled people in April 2006 the Access Moray Card will also be used to enable these groups to access concessionary travel.
- 3.29. Fewer Panel members had heard of the Card (41%) than those who had never heard about it (55%) as shown in the table below. Considerably fewer than 1 in 10 respondents (7%) claimed to have a high level of awareness. Around 1 in 3 (34%) had some awareness of it but half of these did not know how it worked in practice.
- 3.30. Levels of awareness of the Card were higher among the over 60s although only 1 in 10 (10%) had a high level of awareness. Around 2 in 5 older people (44%) had never heard of it compared to around 3 in 5 (60%) in other age groups.

Figure 4: Awareness of Fair Travel Scheme/ Access Moray Card

- 3.31. Notwithstanding the low level of detailed awareness of the scheme 1 in 5 respondents (20%) thought that they or their children would be eligible for using the Card. A half of all respondents did not think themselves to be eligible but a substantial minority, 1 in 3, did not know whether they were eligible or not.
- 3.32. Reported level of usage of the Card at 12% was also above the level of reported detailed knowledge of the scheme (+5%). Over 4 in 5 respondents (82%) ha made no use of the card.

Table 10: Eligibility for/ use of Fair Travel Scheme/ Access Moray Card

	Num	%
You or Your Children Eligible for Fair Travel/ Access Moray Card?		
Yes	174	20%
No	416	47%
Don't know	286	33%
BASE	876	
You or Your Children used Fair Travel/ Access Moray Card?		
Yes, regularly	20	2%
Yes, occasionally	83	10%
No, never	709	82%
Don't know	57	7%
BASE	869	

- 3.33. Around 2 in 3 respondents had a view on the Scheme's effectiveness, with more than 1 in 3 selecting Don't know/Can't say as their answer - unsurprising given the relatively high proportion of respondents who had not heard of the scheme. The responses for those who did have a view are shown below.
- 3.34. The great majority of respondents (84%) consider the Access Moray Scheme to be important, split equally between those who think it 'very' and 'fairly' important. Only 6% specifically thought it unimportant.
- 3.35. There was major variation in views of perceived importance by age groups with older people no more likely than other groups to consider it important although they were a little more likely to consider it 'very' important as opposed to 'fairly'.
- 3.36. Respondents from the Fochabers, Buckie and Lossiemouth areas were more likely to consider the Scheme important than in other areas.

Table 11: Perceived importance of Fair Travel Scheme/ Access Moray Scheme

	Num	%
Very important	241	42%
Fairly important	238	42%
Neither/ nor	58	10%
Fairly unimportant	19	3%
Very unimportant	17	3%
BASE	573	

Note: 317 selected "don't know/ can't say"

- 3.37. Only 1 in 4 respondents had a view on the Scheme's effectiveness, the majority selecting Don't know/Can't say as their answer. The responses for those who did have a view are shown below. Over half (55%) felt that the Scheme was effective although the majority of these found it only 'fairly' so. Fewer than 1 in 5 of those with a view considered the Scheme to be 'very' effective.

Table 12: Perceived effectiveness of Fair Travel Scheme/ Access Moray Scheme

	Num	%
Very effective	42	18%
Fairly effective	84	37%
Neither/ nor	63	28%
Fairly ineffective	24	11%
Very ineffective	15	7%
BASE	228	

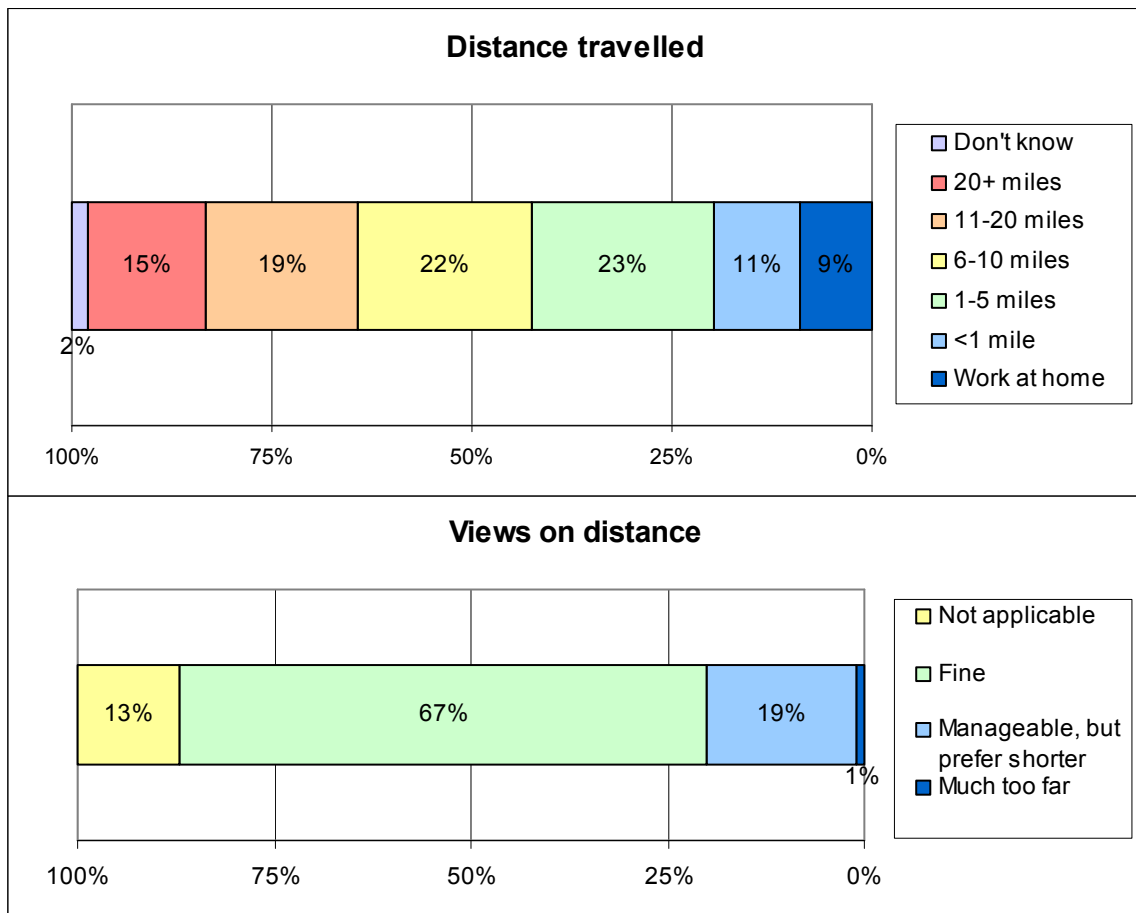
Note: 662 selected "don't know/ can't say"

4. TRAVEL TO WORK, SCHOOL AND COLLEGE

Travel to Work

- 4.1. Those who were in employment or work related training/education were then asked a series of questions about how they travel to and from their place of work. These questions were answered by around 70% of Panel members.
- 4.2. In terms of distance travelled the profile of people's experience is quite evenly distributed between those that undertake short distance, medium distance and long distance journeys. Based on a single one way journey for example 1 in 5 work at home or within 1 mile of their place of work, 1 in 5 travel between 1 and 5 miles, 1 in 5 travel 6 to 10 miles and 1 in 5 travel 11 to 20 miles. Around 1 in 7 travel longer distances of over 20 miles. When return trips are considered this means that over 1 in 3 respondents are travelling over 40 miles on a daily basis.
- 4.3. Those in the Elgin and Lossiemouth areas are less likely to travel more than 11 miles each way to work 22-23% compared to 34% across the whole of Moray. Those living in the Speyside, Keith and Buckie areas are more likely to travel long distances with around 2 in 5 travelling more than 11 miles each way. However interestingly it is the Buckie area (not Speyside) where people are more likely to travel over 20 miles each way with 1 in 4 respondents from this area saying that they travel these long distances.

Figure 5: Distance travelled to work



- 4.4. For most Panel members (2 in every 3) the distance they travel to work is quite acceptable and manageable. While 1 in 5 would prefer a shorter journey, hardly anyone finds their journey to work 'much too far'.
- 4.5. When asked why they did not use public transport for travel to work the most commonly cited reasons were the infrequency of services and the lack of an appropriate service e.g. in terms of routing. People were much more likely to refer to bus services than train services in this regard but this is likely to reflect the fact that train services are less immediately relevant to many due to them being distant from their home. In summary:
- 2 in 5 felt bus services were not sufficiently frequent
 - 1 in 3 reported that existing bus services were not appropriate
 - 1 in 5 felt that bus travel was too expensive.
- 4.6. There were similar types of concerns re rail services regarding frequency of service and timing although there appear to be relatively fewer concerns regarding comfort and reliability than in the case of buses.
- 4.7. There were a few key variations in view by area including:
- Those in the Elgin and Fochabers areas were more likely to comment on the infrequency or wrong timing of bus services
 - Those in the Lossiemouth area more likely to comment on the expense of bus travel
 - Those in the (most rural) Speyside area more likely to comment on the lack of an appropriate service.

Table 13: Reasons for not taking public transport to work

	Num	%
Buses not frequent enough/ not at right times	220	39%
Trains not frequent enough/ not at right times	67	12%
Lack of appropriate service	178	32%
Buses are not reliable enough	56	10%
Trains are not reliable enough	19	3%
Buses are not comfortable enough	16	3%
Trains are not comfortable enough	6	1%
Buses are too expensive	109	19%
Trains are too expensive	61	11%
Not enough information on available services	22	4%
Length of travel time	86	15%
Other	210	37%
I do use public transport to travel to work	65	12%
BASE	565	

- 4.8. Other reasons for not using public transport were given by 2 in 5 respondents (37%). These mostly related to 4 subjects:

- the need to have a car for carrying out their work including availability of company vehicles
- The lack of service to suit the journey required
- The fact that people live nearby their work and walk
- Hours of work not accommodated by public transport.

4.9. When asked to consider whether they would consider sharing a car to work if a colleague lived nearby more than twice as many said that this was likely (45%) as opposed to unlikely (22%). As many as 1 in 4 (26%) said that it would be 'very likely'. However among those unlikely to share views also tended to be strong with the number saying 'very unlikely' more than twice those saying 'fairly unlikely'.

4.10. Very few already take part in car sharing arrangements – 6% of respondents.

Table 14: Likelihood of sharing a car to work if colleague lived nearby

	Num	%
Very likely	163	26%
Fairly likely	120	19%
Neither/ nor	37	6%
Fairly unlikely	46	7%
Very unlikely	94	15%
I already share a car with a work colleague or another person	39	6%
Not applicable (ie don't travel to work by car/ not in work)	125	20%
BASE	624	

4.11. Among those who had a view having a work colleague living nearby is by far seen as the biggest incentive to encourage people to share cars to work – this was identified by more than 2 in 3 respondents as something that would encourage them to do so. Other potential incentives such as car sharing routes with designated points on route appealed to only 1 in 4 as did direct financial incentives.

4.12. People appear to be much more interested in making their own sharing arrangements than for this to be arranged through employers. This is likely to reflect the perceived importance of having some control over whether they share and who with e.g. someone they would feel comfortable with etc.

Table 15: Factors which would encourage greater car sharing

	Num	%
If a colleague lived nearby	277	68%
If your employer helped in arranging car sharing	34	8%
If there were designated drop-off/ pick-up points en route	106	26%
If financial incentives were available (from employer/ government)	98	24%
Other	54	13%
BASE	410	

4.13. Respondents were asked to disclose whether they had ever experienced a range of travel and transport related barriers in relation to getting to work. They were asked firstly to consider all the barriers and then the single most

important they had experienced. It should be noted that this question was answered by only around two thirds of those respondents who answered earlier questions in this section (i.e. about those who travel to work).

- 4.14. There was great deal of consistency between those barriers most commonly experienced and those that were considered most important. These are:
- 1 (Restricted) availability of public transport services (mentioned by 49%; 22% most important)
 - 2 Cost of fuel (44%; 21% most important)
 - 3 Traffic congestion (36%; 21% most important).
- 4.15. Interestingly the cost of public transport services was the next most commonly mentioned by 30% although few saw this as the single most important reason (only 9%). The full set of responses to this question are set out in the table below.

Table 16: Barriers to finding or getting to work

	ALL		MOST IMPORTANT	
	Num	%	Num	%
Traffic congestion	153	36%	85	21%
Poor road links	74	18%	24	6%
Poor rail links	46	11%	1	0%
Cost of fuel	186	44%	87	21%
Availability of public transport services (bus and rail)	206	49%	91	22%
Quality of public transport services (bus and rail)	55	13%	2	0%
Cost of public transport services (bus and rail)	125	30%	36	9%
Availability of information on public transport services	48	11%	7	2%
Delays or cancellations to public transport	60	14%	12	3%
Using more than one form of transport	44	10%	2	0%
Your journey to work involving two or more stages	85	20%	23	6%
Other	47	11%	39	10%
BASE	420		409	

Travel to School and College

- 4.16. Those respondents with dependent children at either nursery, school or college were asked a series of questions about their travel to these facilities from their home. Over 1 in 4 of the survey respondents answered this section. The majority of children involved (4 in 5) were either at primary or secondary school; the remaining 1 in 5 were either at nursery or college with 1 in 10 at each .
- 4.17. Overall 2 in 5 (40%) walk to their education facility mostly walking on their own although some with younger children are accompanied by parents or other adults. Travelling by school bus is the next most common used by over 1 in 4 (27%) while cars are used to transport over 1 in 5 (22%). Few take ordinary public transport and almost none cycle.

- 4.18. For primary school children the majority walk either on their own or with adults (55%) but a substantial minority are either driven by car (22%) or take the school bus (22%). For secondary school children the school bus is the most common mode (44%) although a substantial number also walk (36%); only 11% of secondary school children are driven by car.

Table 17: Eldest child's travel to nursery, school, college

	Num	%
Which of the following does your child attend?		
Nursery school	29	11%
Primary school	93	34%
Secondary school	121	44%
College	32	12%
None of the above	-	-
BASE	275	
And how does your eldest child usually travel to nursery, school etc?		
Walk on own	77	28%
Walk with you/ other adults	34	12%
Bicycle	3	1%
Car	60	22%
School bus	73	27%
Public transport	14	5%
Other	13	5%
BASE	274	

- 4.19. There are important variations in the most common modes of travel used by area including:
- In the Lossiemouth area pupils are much more likely to walk than elsewhere (56%); fewer take the school bus (10%);
 - In the Forres area pupils are also more likely to walk (45%) but are also more likely to go by car (33%); fewer take the school bus (13%);
 - In the Fochabers area pupils are much more likely to take the school bus (46%) but less likely to be taken by car (10%);
 - In the Speyside area fewer walk (28%) and more take the school bus (37%) but not to the same extent as in Fochabers;
 - In the Buckie fewer walk (31%) or take the school bus (17%) but more use the car (35%);
 - In the Keith area relatively more take normal public transport but only 12% do so;
 - In the Elgin areas the profile is much the same as for Moray as a whole shown in the table above.

- 4.20. When asked what could be done to encourage children to walk or cycle to school or college, ignoring those that already walk/cycle, perhaps surprisingly the most common answer was 'nothing' selected by around 1 in 3 respondents but by almost 1 in 2 of those whose children do not currently walk or cycle.
- 4.21. There was little common view about how best to encourage walking and cycling with similar numbers choosing buses or groups of pupils walking or cycling together, more traffic calming measures and if friends walked or cycled (peer acceptance, it being 'cool'). Among those who selected 'other' the most common forms of response related to the distance of education facilities (too far away) or to the suggestion of cycle paths although ideally for some these should be away from the main traffic.

Table 18: Changes which would encourage child(ren) to walk/ cycle to school

	Num	%
More level crossings	14	5%
Walking/ cycling buses (groups of children walked/ cycled to school by adults)	32	12%
More crossing patrols	19	7%
More traffic calming measures	37	14%
If their friends also walked/cycled	34	13%
Other	42	16%
Nothing	79	31%
Child already walks/ cycles to school	91	35%
BASE	258	

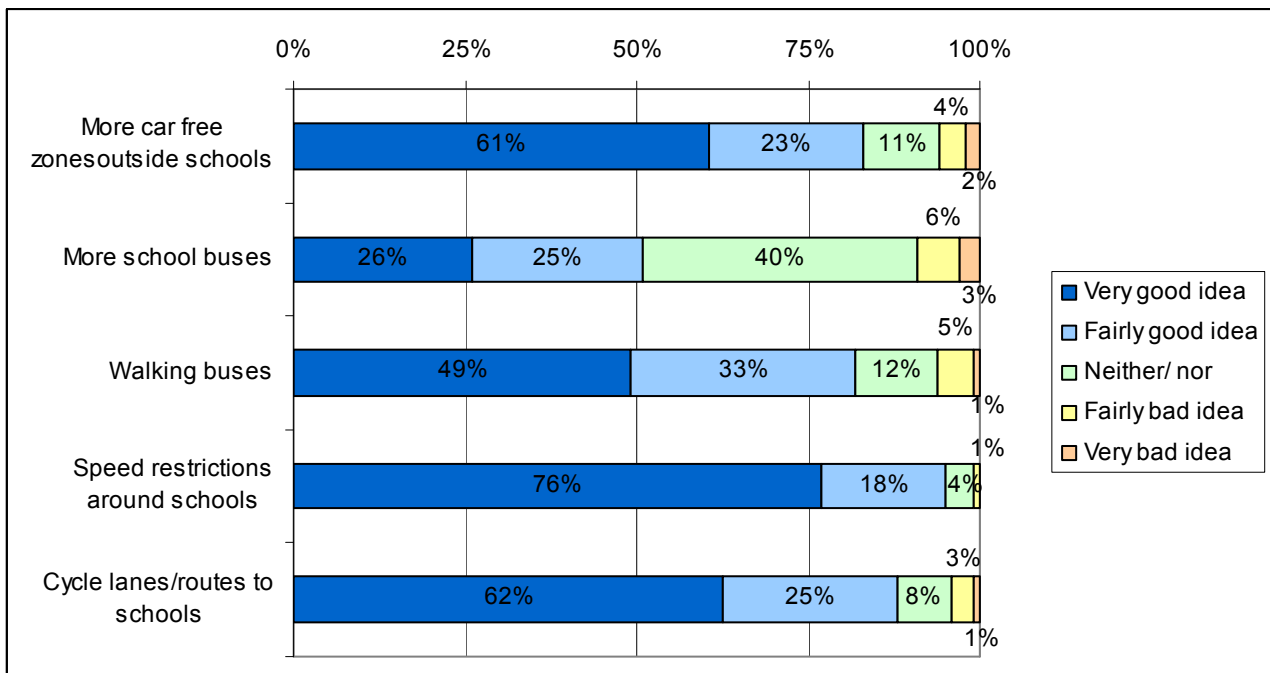
- 4.22. A significant proportion of those attending or with children attending educational facilities did not express a view about satisfaction with public transport links (over 2 in 5). For these people public transport would seem to be an irrelevance or not a viable option.
- 4.23. Of the remainder most are satisfied with existing services although 1 in 7 are dissatisfied.

Table 19: Satisfaction with public transport links between home and school

	Num	%
Very Satisfied	27	10%
Fairly Satisfied	47	17%
Neither/ Nor	39	14%
Fairly Dissatisfied	17	6%
Very Dissatisfied	24	9%
Don't know/ Not applicable	120	44%
BASE	274	

4.24. When all respondents were asked about potential school related initiatives in relation to pupils travel (not just parents with children at school or college) concerns about child safety and the ability of the child to walk/cycle to school come out strongly. For example the level of support for pedestrian/car free zones around schools, speed restrictions around schools, cycle routes to schools (80-95%) are more than twice the level of support for more school buses. There is most interest in speed restrictions and removing cars altogether from the immediate vicinity of schools and nurseries.

Figure 6: Views on potential school-related transport initiatives



4.25. All respondents were asked their views on whether any of the factors set out in the table below had or were likely to be a barrier to attending Moray College based in Elgin. While half of respondents had no interest in attending among those who did the common themes were consistent with those noted previously about public transport services in Moray namely:

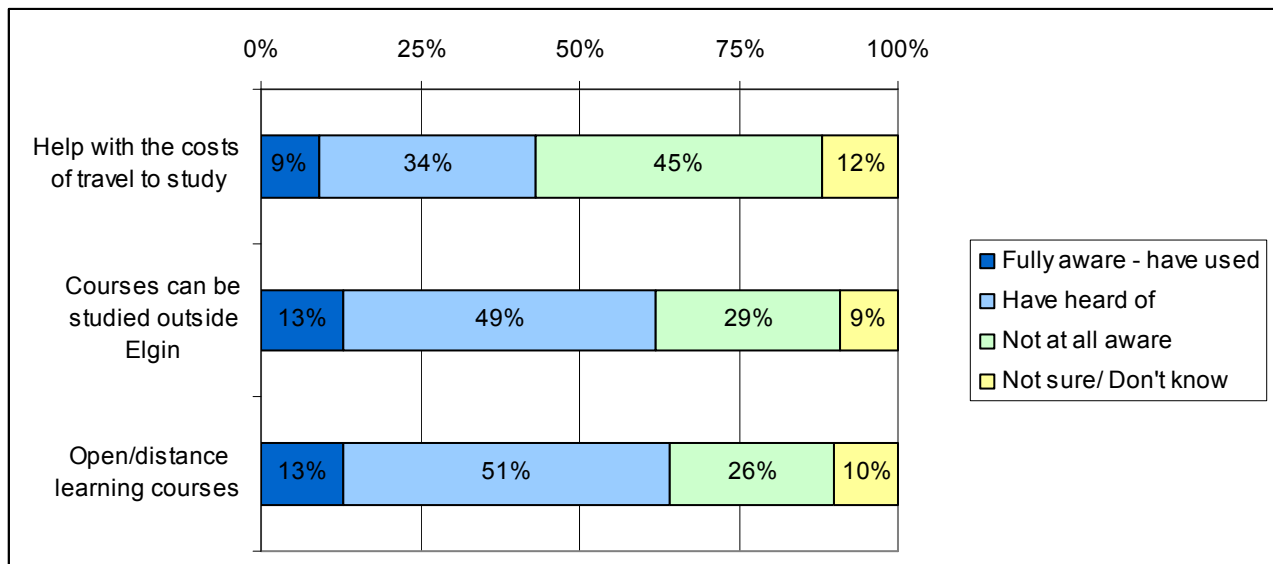
- Lack of service/route available (mentioned by 25%)
- Unsuitable frequency/timing of services (22%)
- Cost of fares (20%).

Table 20: Barriers to attending Moray College

	Num	%
Traffic congestion	73	9%
Poor road links	33	4%
No direct public transport services to Moray College from your home	211	25%
Public transport services too infrequent/ at the wrong times	183	22%
Would take too long to get to Moray College using public transport	147	18%
Cost of fuel	112	13%
Cost of public transport	167	20%
Risk of delays/ cancellation to public transport services	83	10%
Other	32	4%
No barriers to attending Moray College/ Not interested in attending	418	50%
BASE	831	

4.26. While the majority of respondents (around 2 in 3) have some awareness of the availability of courses at centres outside Elgin and of distance learning options not many had any detailed knowledge of these, most had only heard of these possibilities. The fact that students can get assistance in meeting their travel costs to and from college was much less widely known – as many were unaware of this as were aware.

Figure 7: Awareness of Moray College services



5. PARKING

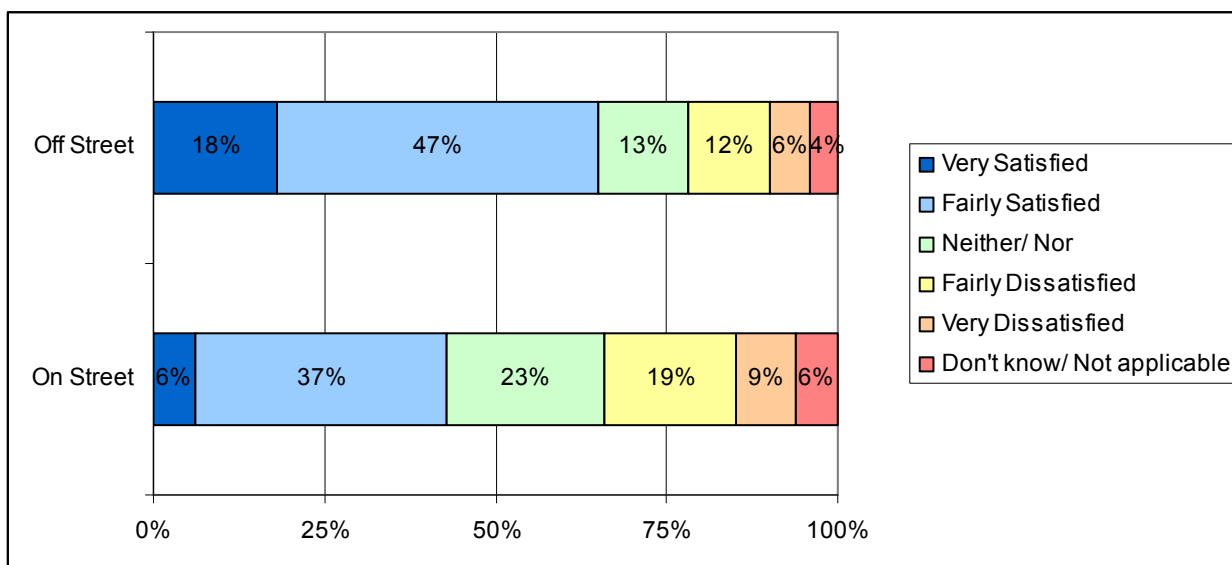
- 5.1. Next Panel members were asked about their experience of car parking in Moray – both in terms of the facilities available and ease of access.
- 5.2. The majority use both on street and off street parking facilities at least once a week, 59% using on street at least once a week rising to 71% in the case of off street. Around 1 in 5 respondents reported using each of on street and off street parking daily. Generally speaking off street parking is used more frequently than on street.

Table 21: Use of on-street and off-street parking in Moray

	ON STREET		OFF STREET	
	Num	%	Num	%
Daily	144	18%	189	21%
At least once a week	340	41%	442	50%
At least once a month	59	7%	104	12%
Now & Again	190	23%	90	10%
Never	79	10%	47	5%
Don't know/ can't say	10	1%	9	1%
BASE	822		881	

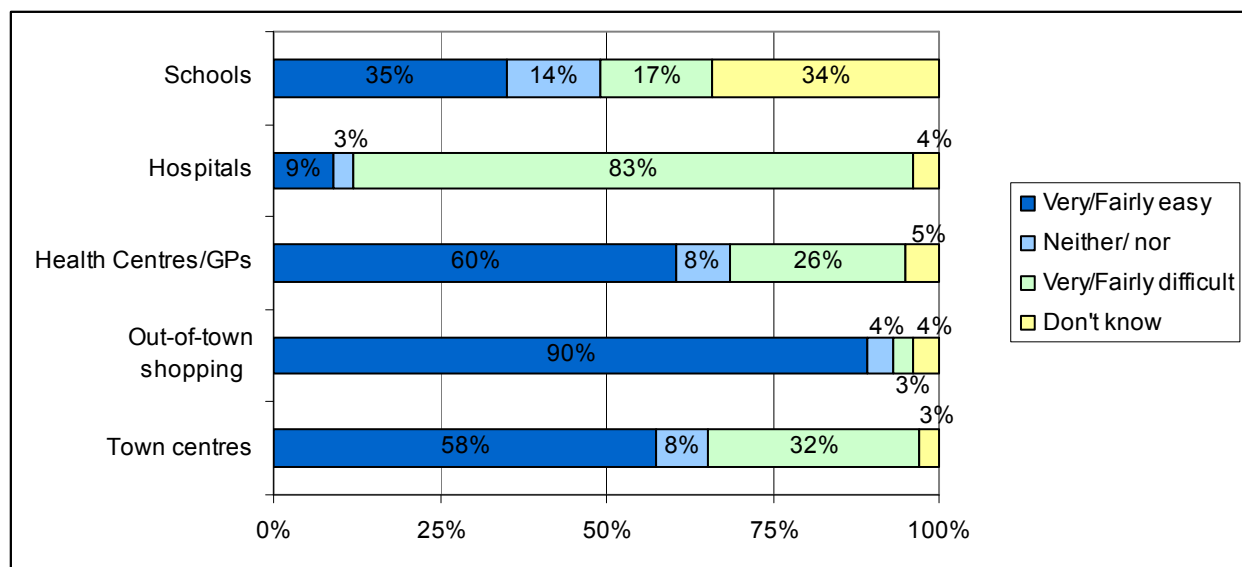
- 5.3. Substantially more people are satisfied with parking facilities in Moray than are dissatisfied. Levels of satisfaction are higher with off street (65% satisfied; 18% 'very') than with on street provision (43% satisfied; 6% 'very'). Around 1 in 4 are dissatisfied with on street provision and 1 in 5 with off street provision. There are no major variations in view by area although respondents in the Forres area are more likely to be content with off street provision compared to elsewhere.

Figure 8: Satisfaction with on-street and off-street parking in Moray



- 5.4. Presented with 5 specific types of location parking difficulties are reported to be most severe when visiting hospitals with as many as 4 in 5 respondents (83%) reporting difficulties; the majority of these report parking here as being 'very' difficult.
- 5.5. The majority of people find parking in town centres easy (3 in 5) rather than difficult (1 in 3), although few find such parking 'very' easy and few find it 'very' difficult. Views of ease of parking at health centres/GPs is much the same although this can be quite straightforward for some people.
- 5.6. Among those who have experience of trying to park at schools or college, people are twice as likely to say that it is easy rather than difficult although again few find it 'very' easy.
- 5.7. 90% of respondents find parking easy at out of town shopping facilities with over half of these finding such parking 'very' easy.

Figure 9: Ease of parking at specific locations



- 5.8. When presented with a series of statements about parking the following views come through:
- Views are split as to whether there is enough on street parking provision in town/village centres (36% agree;46% disagree)
 - 1 in 2 feel that local on street parking regulations are regularly abused and that there should be more stringent enforcement of these;
 - 3 in 5 feel that the absence of local parking regulations would lead to more congestion than at present, although 1 in 5 disagree;
 - 1 in 2 also feel that there is insufficient off street parking provision across Moray, although 1 in 4 disagree;
 - The vast majority (70%) consider that off street provision is generally of good quality with very few disagreeing that this is the case;

- Views are split on whether off street parking charges are too high or not, although more find them expensive than not.
- 5.9. Those living in the Lossiemouth area are more likely to think there is insufficient on street parking in towns and villages; those in the Buckie area feel more strongly than elsewhere that local parking regulations should be more strictly enforced; and those in the Forres area are more likely to dispute whether there is sufficient off street parking provision.

Table 22: Views on parking in Moray

	Strongly agree	Agree	Neither/nor	Disagree	Strongly disagree	Don't know/Can't say
There are enough on-street parking spaces in central areas of most towns/villages	4%	32%	19%	30%	10%	5%
Drivers regularly ignore on-street parking regulations in my local area	12%	34%	22%	18%	2%	13%
There should be more enforcement of on-street parking restrictions	16%	37%	25%	12%	4%	6%
Traffic congestion would be worse if there were no on-street parking restrictions	19%	42%	15%	13%	5%	6%
There are not enough off-street parking facilities in Moray	12%	34%	23%	24%	2%	4%
Off-street parking facilities in Moray are generally in good condition	4%	66%	18%	6%	1%	4%
Off-street parking charges are too high	16%	27%	26%	24%	3%	6%

6. ROAD SAFETY AND DRINK DRIVING

- 6.1. Panel members were next asked a series of questions about road safety and about drink driving in particular.
- 6.2. When presented with a list of possible road safety measures and asked to consider which they would like to see introduced in Moray, improvements to the standard and condition of existing roads was by far perceived to be the highest priority. This was selected by over 4 in every 5 respondents (83%).
- 6.3. An increase/extension of restricted speed areas eg near schools, town centres etc and pedestrian only zones restricted areas were the next most common mentioned by 50-60%. Educating drivers about the risks of accidents and promoting responsible and safe driving was also considered important by over 2 in 5 while 1 in 3 felt that improved signage would help.

Table 23: Views on potential road safety measures for Moray

	Num	%
Better/ more prominent road signs	294	31%
Higher standard roads (eg road surface, dual carriageway)	782	83%
More speed cameras	202	21%
More advanced driving courses (eg motorway driving)	222	23%
More driver safety education	414	44%
More pedestrian zones (eg in town centres, near schools)	496	52%
More restricted speed areas (eg "20's Plenty")	568	60%
Other measures	148	16%
BASE	945	

- 6.4. When asked which of the above were the most important the most popular answers reflect those above with higher road standards regarded as by far the most important. The top 3 suggestions were:
1. Higher road standards
 2. Restricted speed areas
 3. More pedestrian zones
- 6.5. Although there are no fixed guidelines on when a driver would become over the limit after consuming alcohol (as this depends on body weight, metabolism, taking of food, drink measures etc) it is likely that anything over 4 units at one session for a man and 2 to 3 units for a woman is likely to place them at risk of driving over the legal limit.
- 6.6. Interestingly the vast majority of respondents think the limit is more strict than this with 4 in 5 (79%) respondents thinking that the upper limit is either 1 unit (eg half a glass of wine) or 2 units (1 glass of wine). Encouragingly no one thinks that over 4 units is safe.

Table 24: Awareness/ views on drink driving limit

	Num	%
Amount of alcohol consumed before average person over limit		
Up to 1 unit	414	43%
2 units	344	36%
3 units	86	9%
4 units	21	2%
5+ units	-	-
Don't know/ can't say	91	10%
BASE	956	
Any change to current drink driving limit?		
Remain the same	324	34%
Lowered somewhat	103	11%
Lowered to zero	498	52%
Don't know/ can't say	40	4%
BASE	965	

- 6.7. Notwithstanding this perception a slim majority of Panel members (52%) would like to see the drink driving limit reduced further to zero. While 1 in 10 (11%) feel it should be lowered, 1 in 3 (34%) think it should remain at the level it is.
- 6.8. Males were considerably more likely to say that the limit should remain as it is with equal numbers having this view as those feeling that it should be reduced to zero. On the other hand females were much more likely to want to reduced to zero. There was little variation by main age group.
- 6.9. Perceptions as to whether those living in Moray drink drive anymore than anywhere else are split almost equally between those who think the incidence is higher (35%) and those who think it much the same as elsewhere (36%). However a substantial minority felt unable to comment as they did not know. However very few thought it likely that the incidence was lower than elsewhere.

Table 25: Levels of drink-driving in Moray higher/lower than elsewhere

	Num	%
Much higher	94	10%
A little higher	242	25%
About the same	352	36%
A little lower	36	4%
Much lower	8	1%
Don't know/ can't say	235	24%
BASE	967	

- 6.10. When asked if they would be likely to report someone for suspected or known drink driving the majority found it likely with most saying it would be 'very' likely. As many as 4 in 5 (79%) would report someone if they definitely knew they were drink driving with less than 1 in 10 (8%) saying that they would not.
- 6.11. For suspected (as opposed to known) drink driving the proportion willing to report falls to 3 in 5 (59%) – but still a substantial majority- and those unlikely to do so to 1 in 5 (19%).
- 6.12. Attitudes did not vary by gender nor by age.

Table 26: Likelihood of notifying Police/ Crimestoppers of drink driving

	Very likely	Fairly likely	Neither/ Nor	Fairly unlikely	Very unlikely	Don't know/ Can't say
Suspected an individual was drink driving	31%	28%	13%	13%	6%	8%
Knew an individual was drink driving	52%	27%	6%	5%	3%	7%

- 6.13. When asked to consider a series of statements relating to policing and awareness in relation to drink driving in Moray the following views were expressed:
- The vast majority (4 in 5) agree that road policing should focus on areas where there is community concern whether there is an accident history or not; only a minority (1 in 5) feel that policing should focus on proven accident spots;
 - A majority (3 in 5) feel that not enough is known about the scale of drink driving in Moray and only 1 in 10 disagree;
 - Views are more split on whether the message about the dangers and impact of drink driving is effectively getting across to drivers – while 1 in 2 feel that the message is being effectively put across, a substantial minority (around 1 in 3) disagree.
- 6.14. In responding to this series of statements, people were reluctant to say that they 'strongly' agreed or disagreed which may suggest that they are coming from a not wholly/well informed position.

Table 27: Views on road safety/ drink driving in Moray

	Strongly agree	Agree	Neither/ nor	Disagree	Strongly disagree	Don't know/ Can't say
Road policing should monitor areas where there is a community concern even if there is no accident history	27%	52%	11%	6%	1%	2%
There is not enough awareness of the scale of drink driving in Moray	21%	40%	18%	9%	1%	10%
Road policing should only focus on areas with a proven accident history	7%	14%	16%	52%	10%	2%
The drink drive message is put across effectively	11%	39%	17%	24%	6%	3%

- 6.15. Many more answered the next question which asked why they thought the anti drink driving message was not getting across than actually believed that it wasn't (as featured above).
- 6.16. By far the most commonly held view was that sentencing in such cases was too lenient (over 7 in 10 held this view). Around 2 in 5 felt that campaigns were either not strong enough or were not targeted at the right people. A minority although a fairly substantial one (1 in 3) felt that there was not enough media coverage.

Table 28: Why is drink driving message not put across effectively enough?

	Num	%
Not enough press/media coverage or publicity	194	32%
Campaigns are not strong enough	254	42%
Campaigns are not targeted at the right people	272	45%
Sentences are too lenient	436	72%
Other	75	12%
BASE	603	

7. OUTDOOR ACCESS AND THE ENVIRONMENT

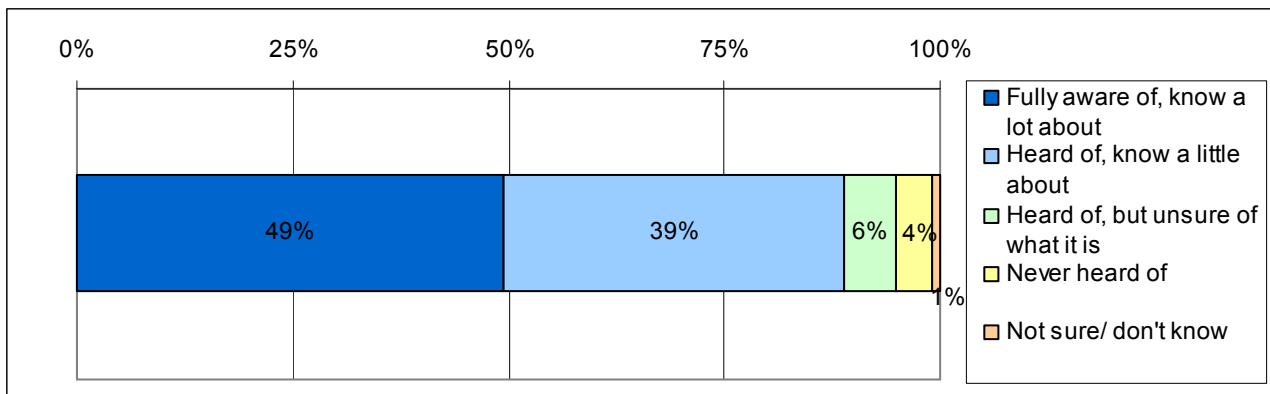
7.1. Next respondents were asked to answer a set of questions about access and the countryside focusing on walkways.

Outdoor Access

7.2. Almost all Panel members had heard of the Speyside Way (94%) and over half of these reported being very aware of, or knowing a lot about, it. Not surprisingly those living in the Speyside area had the highest level of familiarity (81% fully aware/know a lot about) followed by those from the Fochabers area (71% fully aware etc).

7.3. While the majority of those living in other areas were aware of the Way those living in the Forres, Buckie and Lossiemouth areas are considerably less likely to know a lot about it than in other areas.

Figure 10: Awareness of Speyside Way



7.4. When asked to choose how they had heard of the Way 1 in 2 respondents said that they had always known about it and another 1 in 4 thought that they knew about it through word of mouth.

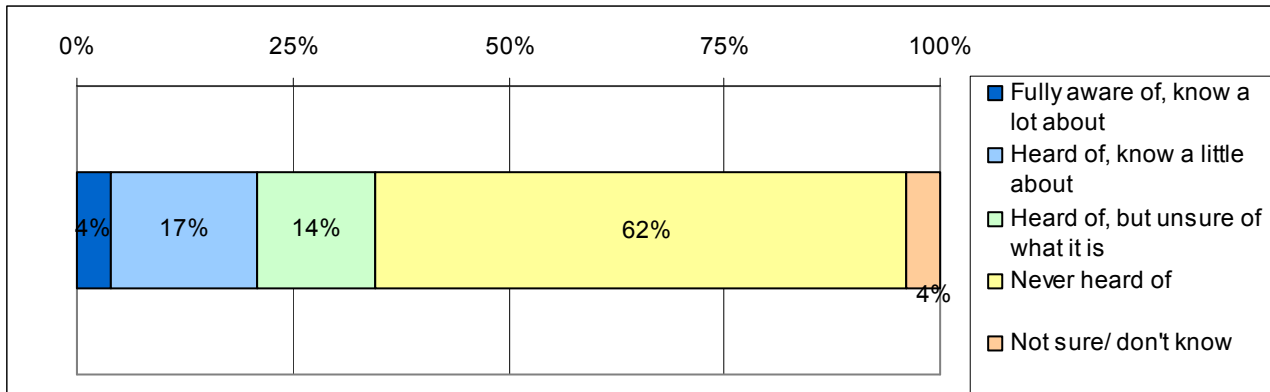
7.5. Relatively few just over 1 in 10 had heard about it through forms of publicity such as the media/advertising or leisure/ tourist information. Very few first got to know about it through the Way's web site or its visitor centre.

Table 29: How heard of Speyside Way

	Num	%
Word of mouth	216	23%
Through the media (eg local press, radio, television)	115	12%
Through leisure/ tourist information	125	13%
Through the Speyside Way website (www.speysideway.org)	5	1%
Through the Speyside Way visitor centre	11	1%
Always known about it	419	45%
Don't know/ can't say	49	5%
BASE	940	

7.6. The majority of respondents had not heard of the Moray Core Paths Plan which sets out a series of ‘core paths’ to provide reasonable public access to the countryside. Over 3 in 5 had never heard of it. Only 1 in 5 thought that they knew something about it what it was but very few felt that they knew a lot about it.

Figure 11: Awareness of Moray Core Paths Plan



7.7. The vast majority of respondents (over 70%) felt it important that the Plan addresses issues about leisure, tourism , health and the potential for achieving outdoor access for all – most who had a view thought that these issues were all ‘very’ important to address. The relevance for addressing transport issues was considered less important perhaps because the relevance for the Plan to address transport issues was not immediately relevant.

7.8. Around 1 in 5 felt that they could not comment on the significance of the Plan in addressing these issues..

Table 30: Importance of outdoor issues for Moray Core Paths Plan

	Very important	Fairly important	Neither/ nor	Fairly unimportant	Very unimportant	Don't know/ Can't say
Leisure/ recreation	50%	27%	3%	1%	0%	19%
Tourism	50%	27%	3%	1%	0%	19%
Transport	25%	30%	15%	5%	1%	23%
Health	43% ₁	29% ₂	7% ₃	2% ₄	0% ₅	19% ₆
Outdoor access for all	48% ₁	27% ₂	4% ₃	1% ₄	1% ₅	19% ₆

7.9. When presented with a potential range of criteria for using in the identification of ‘core paths’ the majority of respondents thought that they were all important but some more than others.

7.10. For example around 2 in 3 felt that selection should definitely be focused on routes used by local people and 3 in 5 on routes linking communities and places. These were seen as the greatest priority. Routes used by tourists were seen as important but considerably less so.

7.11. Again around 1 in 5 felt that they could not really express a view on such matters.

Table 31: Potential criteria to identify “core paths”

	Definitely	To some extent	No	Don't know/ Can't say
Routes used by local people	65%	17%	0%	17%
Routes used by tourists	41%	38%	2%	19%
Routes to link communities and places	61%	21%	0%	18%
Routes at risk from development	44%	28%	5%	24%
Routes of strategic importance	49%	27%	2%	22%
Routes free from physical barriers	49%	28%	2%	21%

Transport and the Environment

- 7.12. Respondents were also asked a series of questions exploring their views and experiences concerning the relationship/ interaction between transport and the environment in Moray.
- 7.13. Presented with a list of possible measures to reduce the local environmental impact of car use and increase the use of more environmentally friendly forms of transport Panel members views on the extent to which they would impact can be summarised as follows:
- Using rail rather than road for goods distribution and more use of local producers are regarded as those that would have the greatest impact – in each case around 90% thought that these would have an impact with around 50% thinking that their introduction would have a ‘great’ impact
 - The next most important were considered to be the integration of transport into planning process as well as more cycle and walking routes.
 - All other measures mentioned were considered likely to have a positive impact although support was least for measures that related to car charging in cities (although there is a possibility that some did not see this as especially relevant in the case of Moray). Similarly a compulsory requirement to provide through ticketing in public transport was seen as less important than other measures (although again some non users of public transport may not have seen this as being especially relevant to them).

Table 32: Environmental impact of transport changes

	Great impact	Some impact	Neither/ nor Not sure	Little impact	No impact
Use rail rather than road for goods distribution	51%	35%	5%	7%	2%
More use of local producers	50%	39%	6%	4%	1%
Locate business near rail & public transport	27%	49%	16%	7%	1%
Integrate transport issues into planning process	41%	41%	15%	3%	1%
Require public transport to offer through-ticketing	17%	36%	36%	7%	2%
Improve local travel information	24%	45%	21%	9%	2%
Car charging to reduce congestion in cities	14%	30%	25%	22%	9%
More car free zones	22%	41%	19%	14%	5%
More cycle and walking routes	36%	44%	10%	7%	3%
More Park & Ride facilities	26%	43%	14%	13%	4%
More car sharing for work	27%	45%	14%	10%	3%
Less use of car for work	29%	41%	17%	9%	4%

- 7.14. Respondents were then asked to consider whether each of the same measures would be a good idea or not and the overall pattern of responses was very similar to the previous set which considered potential impact. This suggests that in this subject area respondents very much assess the potential value of these measures in terms of their likely impact.
- 7.15. It is interesting to note that improvements to local travel information rank more highly as an idea than in terms of likely impact. Using rail rather than road for goods distribution and using more local producers again rank highest as a good idea with 2 in 3 thinking these to be 'very' good ideas.

Table 33: Transport changes a good/ bad idea

	Very good idea	Fairly good idea	Neither/ Nor Not sure	Fairly bad idea	Very bad idea
Use rail rather than road for goods distribution	65%	24%	7%	3%	1%
More use of local producers	65%	29%	6%	1%	0%
Locate business near rail & public transport	34%	41%	21%	3%	1%
Integrate transport issues into planning process	45%	38%	16%	0%	0%
Require public transport to offer through-ticketing	23%	36%	39%	2%	1%
Improve local travel information	35%	46%	18%	1%	1%
Car charging to reduce congestion in cities	14%	25%	27%	21%	13%
More car free zones	25%	35%	25%	10%	4%
More cycle and walking routes	47%	39%	11%	2%	1%
More Park & Ride facilities	31%	39%	20%	7%	3%
More car sharing for work	34%	41%	21%	4%	1%
Less use of car for work	31%	34%	24%	8%	3%

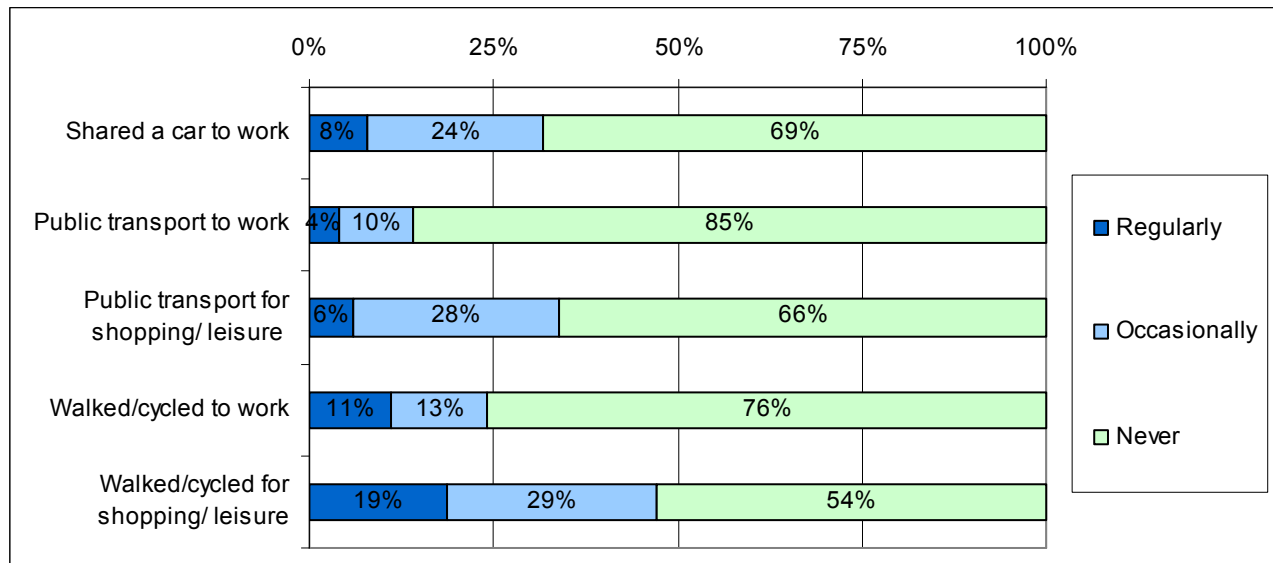
7.16. When asked how often respondents had used alternative means of transport to their car over the last year in varying situations:

- Only a small minority (considerably less than 1 in 10) had used any of the alternatives on a 'regular' basis with very few regularly sharing a car to work, taking public transport to work as an alternative or using public transport for shopping or leisure activities;
- 1 in 10 had regularly walked or cycled to work and 1 in 5 had regularly walked or cycled for the purpose of shopping or leisure.

7.17. While many respondents reported occasional use of alternatives:

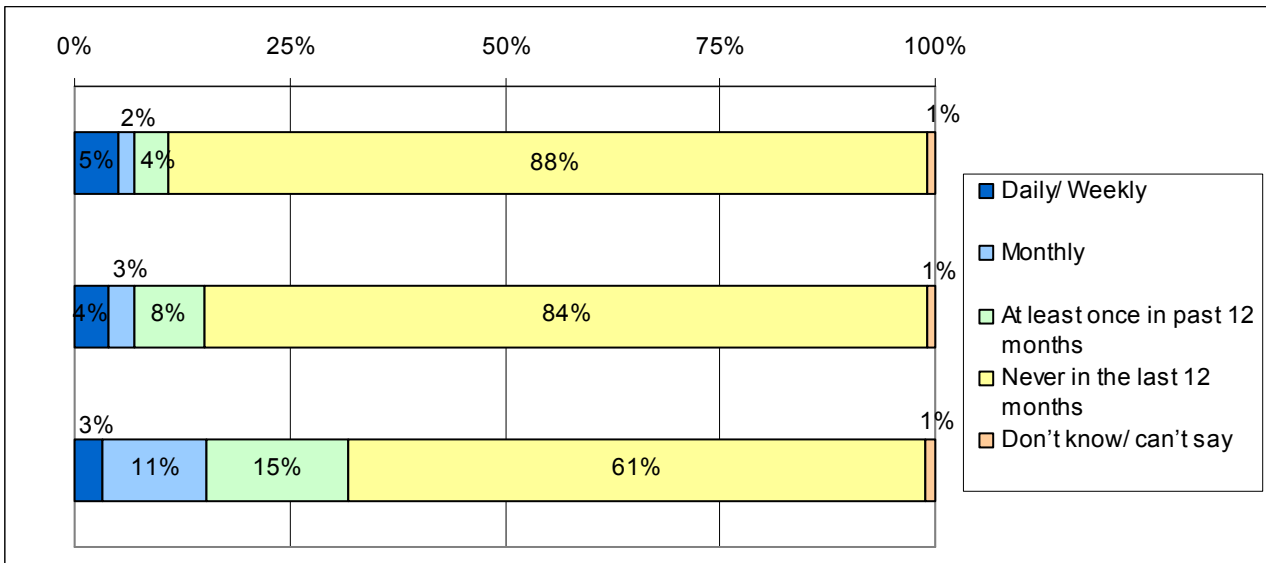
- Almost 9 in 10 had never taken public transport to work as an alternative to their car;
- 3 in 4 had never walked or cycled to work instead;
- 2 in 3 or more had never shared a car to work or used public transport for shopping or leisure use.

7.18. It is only walking or cycling for shopping/leisure purposes where more than half respondents have some experience.

Figure 12: How often used alternatives to private car in past year

- 7.19. There is little difference between the sexes in their propensity to use alternatives to the car. Under 45s have slightly more experience of sharing a car to work while over 60s tend to have slightly more experience of using public transport for shopping and leisure purposes.
- 7.20. Asked specifically about their experience of walking in relation to work, as many as 9 in 10 respondents had never done so over the previous year and as many as 4 in 5 had never done so in relation to shopping. Considerably less than 1 in 10 had walked to work or to shop in the previous month, with only 4-5% (around 1 in 20) doing so at least once a week.
- 7.21. It is only in the field of recreation that substantial numbers have experience of walking but again this can only be considered frequent or regular for at most 1 in 4 respondents (at least monthly). 3 in 5 report having never walked for recreational purposes in the last 12 months.
- 7.22. Over 60s were even more likely not to have recently walked for any of these purposes than other age groups while under 45s were slightly more likely to have walked recently for recreational purposes but not anymore likely to have done so very frequently (at least once a week). There were no significant variations in responses by gender.

Figure 13: How often walked/ cycled for work, shopping or recreation in past year



- 7.23. When asked what changes could be made to encourage greater use of cycling by far the most common response was the creation of cycle lanes/cycle paths that were more segregated from other forms of traffic (mentioned by 3 in 5 respondents).
- 7.24. The next most common incentives were closely associated with this with 1 in 3 mentioning both a reduction in traffic/congestion and providing better education to motorists in order to improve road safety for cyclists.
- 7.25. Improved facilities for cyclists at their place of work, such as parking and showers were considered important by a minority.
- 7.26. Among those citing 'other' measures jocular references were made to making Moray flatter or improving its climate as well as references to individuals' limitations due to age or health factors as well as the distance of their home from work, shopping etc.
- 7.27. 1 in 3 respondents felt that there was nothing that could be done to encourage them to make greater use of cycling. This role to over 50% for those over 60.

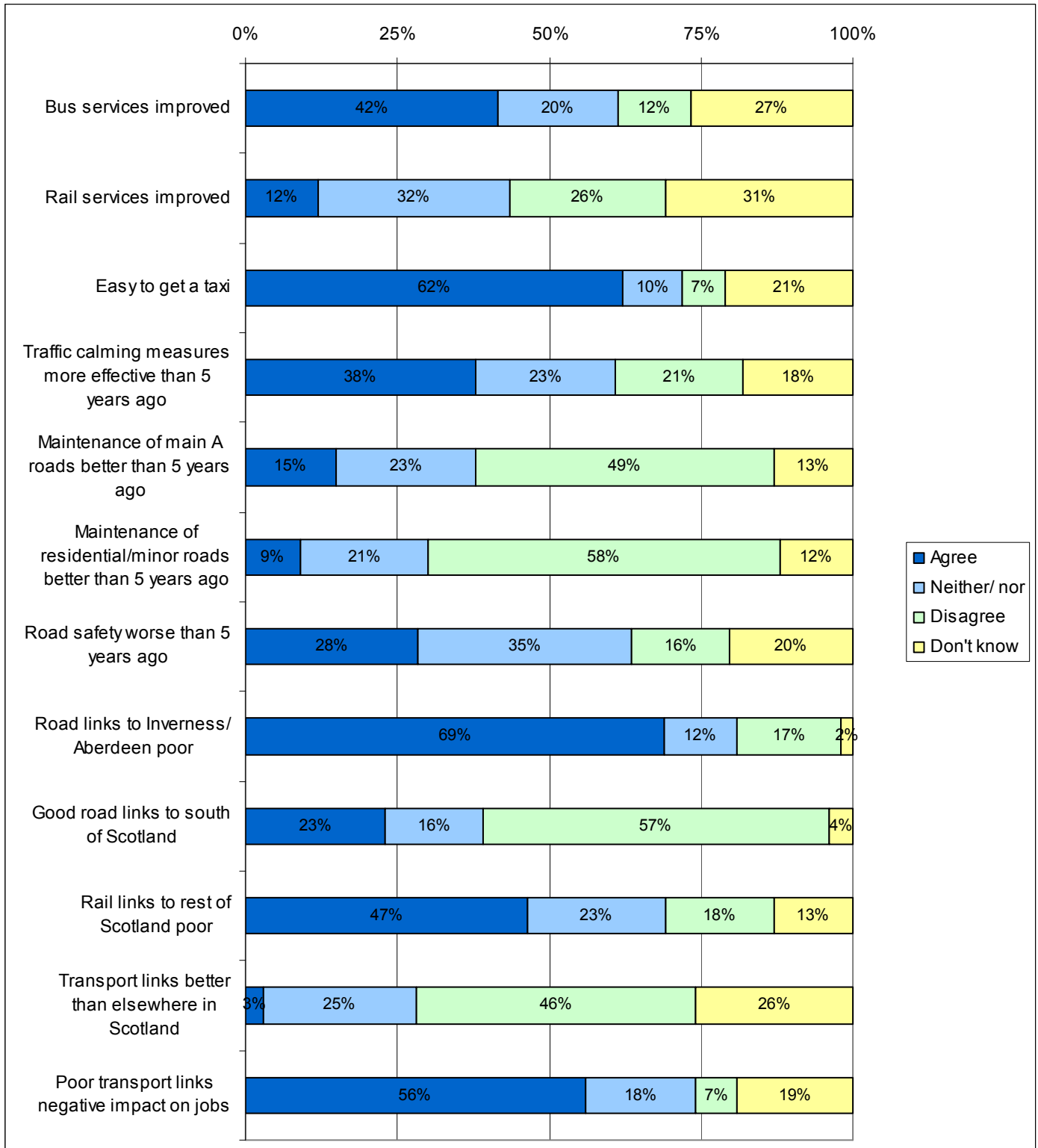
Table 34: Changes which would encourage greater use of cycling

	Num	%
More segregated cycle lanes/ cycle paths	514	57%
Cyclists given priority at junctions	112	12%
Less traffic and congestion	304	34%
Education for car drivers to improve road safety for cyclists	326	36%
Better integration with public transport	127	14%
More bicycle parking/ storage at work	167	19%
More facilities for cyclists at work (eg showers)	141	16%
Provision of bicycles for children	89	10%
Other measures	77	9%
Nothing could encourage me to cycle more	298	33%
BASE	900	

8. OVERALL VIEWS ON TRANSPORT

- 8.1. Finally in this questionnaire Panel members were asked about their overall views about transport issues in Moray and what they think the priorities should be for future investment by the Council.
- 8.2. Presented with a series of statements about existing transport related provision in the area they were asked whether they agreed or not with the statements and how strongly they agreed or disagreed.
- 8.3. The statements that attracted the strongest opinion were:
- 7 in 10 agreed that road links between Moray and the nearest cities of Inverness and Aberdeen were poor – more felt this strongly than not
 - 3 in 5 agreed that it was easy to get a taxi in Moray – very few disagreed this to be the case
 - 3 in 5 disagreed that road maintenance of minor roads had improved in the last 5 years
 - 3 in 5 disagreed that there were good road links to the South of Scotland from Moray
 - Over half of respondents felt that poor transport links with the rest of Scotland was having an adverse local impact on job availability – very few disagreed
 - Around half felt that there had been no improvement in the maintenance of Class A Roads in Moray over the last 5 years
 - Almost half disagreed that transport links between Moray and the rest of Scotland were better than elsewhere in Scotland.
- 8.4. Among those who had a view (although between 50-60% did not) less strongly articulated views included the following:
- Substantially more felt that that bus services had improved in recent years than not – this was not the case for rail services
 - More felt that traffic calming/speed reduction measures were more effective than previously than not
 - More felt that road safety had improved in recent years than not, although many did not have a view.
- 8.5. The full set of responses are shown in the figure below.

Figure 14: Views on transport and traffic in Moray



- 8.6. When asked what should be the priorities for future investment respondents were asked to rank on a scale of priority from high to low which aspects were the most and least important. The equal top priorities, each selected by 3 in 5 respondents as their top priority, concerned both internal and external transport issues. These were:
- 1 The maintenance of existing roads and parking facilities
 - 2 Ensuring that improvements to road and rail links in and out of Moray are included in Scottish Executive investment plans.
- 8.7. Among the other priorities listed feelings were less strong although the next most common were:
- 3 The development of new roads and parking facilities
 - 4 The improvement of local public transport services.
- 8.8. While other suggested priorities were in relative terms seen as a less of a priority in comparison to the above most were still considered a high priority by most including the improvement of walking and cycling facilities, encouraging people to 'greener' forms of transport and improving education and information about transport.

Table 35: Council priorities for future transport investment

	OVERALL RANKING	High priority			Low priority		Don't know
		1	2	3	4	5	
Maintenance of existing roads and parking facilities	1=	60%	27%	10%	1%	0%	1%
Development of new roads and parking facilities	3=	40%	24%	20%	8%	4%	3%
Improvement of rail, airport and port infrastructure	2	39%	27%	21%	5%	2%	6%
Ensure improvements to road/ rail links in and out of Moray are included in Scottish Executive investment plans	1=	62%	25%	8%	1%	0%	3%
Improvement of local public transport services	3=	32%	34%	25%	5%	1%	3%
Improved transport information and education	6	20%	34%	29%	9%	4%	3%
Improvement of walking and cycling facilities	4	33%	29%	24%	7%	4%	3%
Encouraging people to change their mode of transport (eg use 'greener' transport methods)	5	28%	29%	24%	9%	5%	4%

* note average score excludes "don't know"

* * *

APPENDIX 1: SURVEY FORM

APPENDIX 2: ADDITIONAL TABLES

Table A1: Mode of transport normally used for work, shopping, recreation

	Work	Main grocery shopping	Other shopping	Recreation
Private car/ van - driver	67%	82%	71%	70%
Private car/ van - passenger	4%	11%	8%	10%
Motorcycle/ moped	1%	0%	0%	1%
On foot	7%	3%	13%	11%
Bicycle	2%	0%	1%	3%
Bus	3%	3%	6%	3%
Train	1%	0%	1%	1%
Other	1%	1%	0%	1%
Not applicable	16%	1%	0%	1%

Table A2: Frequency of use of public transport in past 12 months

	Bus		Train	
Daily	25	3%	3	0%
At least once a week	70	7%	10	1%
At least once a month	56	6%	46	5%
Now & Again	341	36%	422	47%
Never	429	46%	397	44%
Don't know/ can't say	16	2%	22	2%
BASE	937		900	

Table A3: Likelihood of using public transport for specific types of journey

	Very likely	Fairly likely	Neither/ Nor	Fairly unlikely	Very unlikely	Not applicable
Town centre shopping	15%	20%	8%	13%	36%	9%
Supermarket shopping	9%	10%	4%	14%	56%	7%
Travel to out of town retail/ industrial parks	11%	14%	7%	15%	44%	9%
Occasional short journeys (<10m)	16%	24%	9%	12%	33%	5%
Occasional longer journeys	20%	34%	10%	11%	21%	4%
To see a GP	8%	9%	6%	13%	48%	15%
To get to hospital	14%	15%	5%	13%	46%	6%
To access other health/ care services	11%	13%	8%	15%	46%	8%
To go to a library	8%	12%	8%	12%	45%	16%
To access other public services	10%	14%	11%	14%	42%	10%
To access education/ training	10%	11%	11%	12%	40%	17%

Table A4: Awareness of Fair Travel Scheme/ Access Moray Card

	Num	%
Fully aware of, know a lot about	62	7%
Aware of, know a little about	156	17%
Heard of, but unsure of how it works	161	17%
Never heard of	519	55%
Not sure/ don't know	44	5%
BASE	942	

Table A5: Distance travelled to work

	Num	%
Distance travelled to work (one way)		
I work at home	55	9%
Under a mile	68	11%
1 to 5 miles	138	23%
6 to 10 miles	132	22%
11 to 20 miles	115	19%
More than 20 miles	92	15%
Don't know/ can't say	12	2%
BASE	612	
Opinion on distance		
Much too far	6	1%
Manageable, but would prefer a shorter journey	116	19%
Fine	405	67%
Not applicable	82	13%
BASE	609	

Table A 6: Views on potential school-related transport initiatives

	Very good idea	Fairly good idea	Neither/ nor Not sure	Fairly bad idea	Very bad idea
More pedestrian/ car free zones immediately outside schools/ nursery schools	61%	23%	11%	4%	2%
More school buses	26%	25%	40%	6%	3%
Walking buses (ie groups of children being walked to school by adults)	49%	33%	12%	5%	1%
Speed restrictions around schools/ nursery schools (eg "20's Plenty")	76%	18%	4%	1%	0%
Providing cycle lanes/ routes to schools	62%	25%	8%	3%	1%

Table A7: Awareness of Moray College services

	Fully aware - have used	Have heard of	Not at all aware	Not sure/ Don't know
Full-time students, and some part-time students, can get help with the costs of travel to study	9%	34%	45%	12%
Some courses can be studied in centres outside Elgin	13%	49%	29%	9%
Some courses can be studied with little or no attendance ("Open learning" or "Distance Learning")	13%	51%	26%	10%

Table A8: Satisfaction with on-street and off-street parking in Moray

	ON STREET		OFF STREET	
	Num	%	Num	%
Very Satisfied	53	6%	166	18%
Fairly Satisfied	336	37%	433	47%
Neither/ Nor	205	23%	116	13%
Fairly Dissatisfied	174	19%	114	12%
Very Dissatisfied	79	9%	54	6%
Don't know/ Not applicable	58	6%	39	4%
BASE	905		922	

Table A9: Ease of parking at specific locations

	Very easy	Fairly easy	Neither/ nor	Fairly difficult	Very difficult	Don't know/ Can't say
Town centres in Moray	11%	47%	8%	23%	9%	3%
Out-of-town shopping facilities	48%	42%	4%	2%	1%	4%
Health Centres/ GP practices	19%	41%	8%	18%	8%	5%
Hospitals	1%	8%	3%	24%	59%	4%
Schools/ educational establishments	6%	29%	14%	13%	4%	34%

Table A10: Awareness of Speyside Way

	Num	%
Fully aware of, know a lot about	480	49%
Heard of, know a little about	383	39%
Heard of, but unsure of what it is	60	6%
Never heard of	36	4%
Not sure/ don't know	11	1%
BASE	970	

Table A11: Awareness of Moray Core Paths Plan

	Num	%
Fully aware of, know a lot about	34	4%
Heard of, know a little about	162	17%
Heard of, but unsure of what it is	135	14%
Never heard of	602	62%
Not sure/ don't know	38	4%
BASE	971	

Table A12: How often used alternatives to private car in past year

	Regularly	Occasionally	Never
Shared a car to work	8%	24%	69%
Taken public transport to work instead of a car	4%	10%	85%
Used public transport for shopping/ leisure instead of using a car	6%	28%	66%
Walked or cycled to work instead of using a car	11%	13%	76%
Walked or cycled for shopping/ leisure instead of using a car	19%	29%	54%

Table A13: How often walked/ cycled for work, shopping or recreation in past year

	Work	Shopping	Recreation
Daily	3%	1%	3%
Weekly	2%	3%	9%
Monthly	2%	3%	11%
At least once in past 12 months	4%	8%	15%
Never in the last 12 months	88%	84%	61%
Don't know/ can't say	1%	1%	1%
BASE	769	790	884

Table A14: Views on transport and traffic in Moray

	Strongly agree	Agree	Neither/ Nor	Disagree	Strongly disagree	Don't know/ Can't say
Bus services in Moray have improved in recent years	8%	34%	20%	9%	3%	27%
Rail services in Moray have improved in recent years	2%	10%	32%	21%	5%	31%
It is usually easy to get a taxi in Moray	9%	53%	10%	5%	2%	21%
Traffic calming/ speed reducing measures are more effective than 5 years ago	3%	35%	23%	15%	6%	18%
Maintenance of the main A roads in Moray is better than 5 years	2%	13%	23%	33%	16%	13%
Maintenance of residential and minor roads in Moray is better than 5 years ago	1%	8%	21%	37%	21%	12%
Road safety in Moray is worse than 5 years ago	6%	22%	35%	14%	2%	20%
Road links between Moray and Inverness/ Aberdeen are poor	38%	31%	12%	15%	2%	2%
There are good road links between Moray the south of Scotland	4%	19%	16%	35%	22%	4%
Rail links between Moray and the rest of Scotland are poor	14%	33%	23%	16%	2%	13%
Transport links are better in Moray than elsewhere in Scotland	1%	2%	25%	30%	16%	26%
Poor transport links with the rest of Scotland have a negative impact on jobs in Moray	22%	34%	18%	6%	1%	19%