

**Moray Citizens' Panel**  
**Survey 5: Protecting the Environment**

**Report**

**by**

**Craigforth**

**June 2007**

## CONTENTS

### EXECUTIVE SUMMARY

<b>1.</b>	<b>INTRODUCTION</b>	<b>1</b>
	Background and Study Objectives .....	1
	Methodology and Response.....	1
	Reporting Conventions.....	3
<b>2.</b>	<b>ENVIRONMENTAL ISSUES AND CLIMATE CHANGE</b>	<b>5</b>
	Global Warming .....	5
	Environmental Issues.....	7
<b>3.</b>	<b>THE IMPACT OF ENVIRONMENTAL ISSUES ON YOUR LIFE</b>	<b>12</b>
	Problems.....	12
	Lifestyle.....	14
	Buying Goods .....	18
<b>4.</b>	<b>ROLES AND ACTIONS</b>	<b>21</b>
	Who should tackle environmental issues.....	21
	Actions to tackle environmental issues.....	22
<b>5.</b>	<b>ENERGY USE</b>	<b>24</b>
	In the Home .....	24
	In the workplace.....	27
<b>6.</b>	<b>VISITING THE COUNTRYSIDE</b>	<b>29</b>
<b>7.</b>	<b>NATURAL HERITAGE</b>	<b>31</b>

## List of Tables

Table 1: Profile of Survey Respondents, Panel Members and Moray overall .....	3
Table 2: Existence of global warming .....	5
Table 3: Effect of global warming.....	6
Table 4: Important actions for tackling the environment.....	14
Table 5: Agreement with statements in relation to environmental issues. ....	15
Table 6: Actions taken in the last 12 months.....	17
Table 7: Awareness of actions to tackle the issues.....	22
Table 8: Effective methods for disseminating information .....	23
Table 9: Energy saving measures installed within 12 months .....	25
Table 10: Importance of motivating factors .....	25
Table 11: Energy saving undertaken by employers .....	28
Table 12: Frequency of visits to the countryside .....	29
Table 13: Reasons for visiting the countryside.....	30
Table 14: Perceived meaning of "Natural Heritage" .....	31
Table 15: Importance of aspects of "natural heritage".....	32

## Table of Figures

Figure 1: Importance of environmental issues .....	7
Figure 2: Concern about environmental issues.....	8
Figure 3: Importance of key environmental issues to people in Moray .....	9
Figure 4: Awareness of environmental terms/ issues .....	10
Figure 5: Net seriousness of environmental issues in Moray .....	12
Figure 6: How damaging is your personal lifestyle? .....	16
Figure 7: Impact of recent publicity on behaviour.....	18
Figure 8: Consideration of the environment .....	19
Figure 9: Importance of factors when making purchases .....	20
Figure 10: Perceived role in tackling pollution and environmental issues.....	21
Figure 11: Awareness of the Energy Audit.....	24
Figure 12: Net importance of barriers to installing energy saving measures .....	26
Figure 13: Energy efficiency of employer .....	27
Figure 14: Rating employer energy efficiency by energy saving measures implemented.....	28

## **EXECUTIVE SUMMARY**

The Moray Environmental Forum (MEF) focuses on environmental matters, with the promotion of sustainable development an underpinning principle of the group's activities. The Forum had input to the design of the survey, which sought to gauge Panel members' experiences and views on the environment and the importance of environmental issues in Moray, including the following specific topic areas:

- Environmental issues and climate change;
- The impact of environmental issues on your life;
- Taking action on environmental issues;
- Energy use in the home;
- Energy use in the work place;
- Visiting the countryside; and
- Natural heritage.

Craigforth undertook this survey on behalf of Moray Community Planning Partnership during April and May 2007. The survey was issued to the full sample of Panel members in mid April 2007, with reminder letters sent to all non-respondents at the beginning of May 2007.

### **Environmental Issues and Climate Change**

While there was a strong feeling within the Panel that global warming is definitely happening at the moment, views were more mixed as to the extent to which it will accelerate over the next few decades and the impact of human activity on any acceleration. Respondents were less likely to feel that global warming would "definitely" accelerate over coming decades, and similarly that human activity is contributing to any such acceleration.

Respondents were also somewhat divided in their views on the impact of global warming on their own lives. Although the largest group indicated that global warming would make their lives worse, a sizeable minority felt that it would make no real difference to their lives. Views were more negative in terms of impact on future generations, with the majority believing that global warming would make life worse for future generations.

The overwhelming majority of respondents indicated that the environment and environmental issues were important to them personally. Respondents were concerned about the environment both at a local level and more widely; indeed respondents tended to be somewhat more concerned about environmental issues globally than within Moray or the UK.

In terms of specific environmental issues respondents were generally more concerned about local issues, with recycling, maintaining the quality of towns/ villages and to a lesser extent protecting the local natural environment seen as particularly important issues. These were rated as significantly more important than wider issues such as use of natural resources and climate change/ global warming.

In terms of environmental concepts and phrases, “climate change” and to a lesser extent “natural heritage” were the best understood. “Whole life cycle” was the least understood phrase

### **The Impact of Environmental Issues on Your Life**

Waste was seen as the most serious environmental problem in Moray – fly tipping, disposal of household/ business waste, sewage treatment and recycling were the main environmental problems mentioned by respondents. Pollution was seen as significantly less of a problem for the Moray area, with air pollution and light pollution in particular seen as minor problems for Moray.

More action by the UK government, by other agencies and more public concern on environmental issues were identified as the most important actions for tackling the environment. More public concern on environmental issues was identified as important by more than twice as many respondents as greater public awareness, suggesting that the Panel feels the public are aware of environmental issues but are not sufficiently concerned about them.

The majority of respondents think about the environmental effect of their lifestyle, and felt that they should personally do more to protect the environment. However, respondents generally felt that their own lifestyles were non-damaging to the environment; a relatively small minority described their lifestyle as damaging.

In terms of practical measures undertaken by respondents as a result of environmental concerns, it is notable that the most common actions were those which involved more minor changes in behaviour. Saving electricity by switching off appliances, reusing shopping bags, use of energy-saving light bulbs and choosing local produce were the most common measures. Most respondents stated that publicity on environmental issues and actions had at least some impact on such behaviour.

The majority of respondents indicated that they tend to give some consideration to the environment when making “ordinary” purchases such as groceries. However, in terms of specific factors which affect respondents’ shopping behaviour, it is notable that the factors identified as most important (quality and cost/ value for money) were not related to environmental considerations. In terms of more environment-related issues, the most common considerations for respondents were less or recyclable packaging, energy efficiency ratings and locally produced goods.

### **Roles and actions**

Respondents were clear in their view that the UK government and the Scottish Executive should take the lead role in tackling these issues. SEPA was the only other national organisation which a significant proportion of respondents felt should have a “leading” role in environmental issues. Nevertheless, a large majority of respondents felt that the Council should have a leading or significant role in environmental issues.

In terms of actions currently being taken by these organisations, awareness was highest in relation to action being taken by the Council, and was also high in relation to the UK government and Scottish Executive. Education/ awareness raising in schools and information provided through newspapers were seen as by far the most effective methods for these organisations to communicate on environmental issues.

### **Energy use**

Fewer than 1 in 10 indicated that they had undertaken an “energy audit” on their home, although a total of more than half of respondents indicated that they knew at least “a little” about what an energy audit involved.

Nearly half of respondents indicated that they had installed one or more energy saving measures in their home, with additional loft insulation, more energy efficient systems and double glazing by far the most common. Respondents were very clear that the main reason for installing energy saving measures was to reduce home energy costs; indeed reducing costs was nearly three times more likely than environmental concerns to be identified as a very important reason for installing measures.

The cost of installing energy saving measures was identified by respondents as the most important barrier to installing energy saving measures in the future. A lack of awareness of grants/ help available to install energy saving measures was also identified as an important barrier; clearly significant issues in light of respondents’ rating of the cost of measures as the most important barrier.

Views were somewhat mixed in terms of employers’ energy efficiency, the proportion of respondents giving their employers an excellent or very good rating similar to that giving a quite or very poor rating. In terms of specific energy saving measures implemented by respondents’ employers, paper recycling and promotion of energy saving were the most common.

### **Visiting the Countryside**

Most respondents indicated that they had visited the countryside at least once a week, and fewer than 1 in 5 visited the countryside less than once a month. This high frequency of countryside visits is unsurprising for a relatively rural local authority area such as Moray where a large proportion of Panel members are likely to live within relatively close proximity of the countryside.

Walking or hiking was by some margin the most common specific activity mentioned in relation to visiting the countryside. In terms of other reasons for visiting the countryside, sightseeing was the only activity mentioned by more than half of respondents.

## **Natural Heritage**

Woodland and rivers/ lochs were the most commonly mentioned in relation to “natural heritage”, with mountains, the coastline and wildlife also common. All are key elements of natural heritage, suggesting a relatively good level of understanding of the term “natural heritage”. However, it is notable that a substantial majority of respondents also thought of castles and historic buildings as part of “natural heritage”.

Overall, woodland was seen as the most important aspect of natural heritage. However, coastline and rivers/ lochs were also seen by a substantial majority of respondents as important aspects of natural heritage. Indeed, respondents were more likely to rank “coastline” as the most important aspect of natural heritage than “woodland”.

## 1. INTRODUCTION

### Background and Study Objectives

1.1. The Moray Citizens' Panel was established by the Moray Community Planning Partnership (MCP) in 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 further additions and deletions since the initial recruitment; at the time of the survey the total Panel membership stood at 1178, spread across each of the seven main administrative areas:

- Buckie;
- Elgin;
- Fochabers;
- Forres;
- Keith;
- Lossiemouth; and
- Speyside.

### Methodology and Response

1.3. Craigforth Consultancy and Research undertook this survey on behalf of Moray Community Planning Partnership during April and May 2007. The survey was issued to the full sample of Panel members; postal self-completion questionnaires were issued to all 1178 members in mid April 2007. Reminder letters were sent to all non-respondents at the beginning of May 2007.

1.4. The Moray Environmental Forum (MEF) focuses on environmental matters, with the promotion of sustainable development an underpinning principle of the group's activities.



- 1.5. The Forum had input to the design of the survey, which sought to gauge Panel members' experiences and views on the environment and the importance of environmental issues in Moray, including the following specific topic areas:
  - Environmental issues and climate change;
  - The impact of environmental issues on your life;
  - Taking action on environmental issues;
  - Energy use in the home;
  - Energy use in the work place;
  - Visiting the countryside; and
  - Natural heritage.
- 1.6. A copy of the questionnaire used in the survey is provided at Appendix 1.
- 1.7. A total of 826<sup>1</sup> returns were received by cut off in May 2007, representing an overall survey response rate of 70%. This is a very good level of response, and is similar to that achieved in previous Panel surveys. 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. The achieved sample was broadly representative of the Panel as a whole in terms of the five main indicators presented, although there was a slight under-response from younger Panel members, aged under 40, (-5%) and corresponding over-response from those aged 60+ (+4%).
- 1.9. However, any significant 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 (+6%), and under-representation of males (-6%);
  - There is a significant under representation of those aged under 40 (-14%) and an over representation of those aged 50-59 (+12%);
  - Owners are significantly over-represented (+15%), and households in social rented (-9%) and private rented/other accommodation (-6%) correspondingly under-represented; and
  - The Panel was constructed to achieve 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 resulted in an over-representation of residents in the Speyside area and under representation of Elgin residents, and subsequent deletions from the Panel have accentuated this over/under representation. It may now be appropriate to review the geographic structure of the Panel, for example retiring a number of Speyside Panel members.

---

<sup>1</sup> Of the 826 responses 788 were analysable. Figures throughout this report are based on these 788 completed analysable responses.

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

	Survey Respondents (Total 788)		Panel Members (Total 1178)		Moray <sup>2</sup>
	Num	%	Num	%	%
<b>GENDER</b>					
Male	348	44%	539	46%	50%
Female	439	56%	638	54%	50%
BASE	787		1177		-
<b>AGE</b>					
Under 40	160	20%	297	25%	34%
40-49	163	21%	264	23%	19%
50-59	225	29%	305	26%	17%
60+	236	30%	305	26%	29%
BASE	784		1171		-
<b>HOUSING TENURE</b>					
Owner occupied	649	83%	933	80%	68%
Social rented	77	10%	141	12%	19%
Private rented/ Other	58	7%	99	8%	13%
BASE	784		1173		-
<b>GEOGRAPHIC AREA</b>					
Buckie	98	12%	141	12%	16%
Elgin	97	12%	140	12%	24%
Fochabers	124	16%	167	14%	11%
Forres	124	16%	187	16%	18%
Keith	97	12%	162	14%	8%
Lossiemouth	97	12%	160	14%	14%
Speyside	150	19%	219	19%	9%
BASE	787		1176		-

### 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.
- 1.11. We also conducted crosstabulations of all 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.

<sup>2</sup> Gender and age based on GRO(S) population estimates as at 30 June 2006; housing tenure based on the 2003/ 04 Scottish Household Survey; geographic area based on the 2004 Moray Community Health Index (therefore not directly comparable to 2001 Census or GRO(S) population estimates).

- 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%.
- 1.14. For some questions, “net” figures have been produced. These are calculated by subtracting the percentage of “negative” responses (eg fairly/very dissatisfied) from the percentage of “positive” responses (eg fairly/very satisfied), with the result presented as a positive or negative percentage rating. In situations where there is a large number of neutral or not applicable responses these may be excluded from the base and the percentage of positive and negative responses has been recalculated. We note in the report where this is the case.

## 2. ENVIRONMENTAL ISSUES AND CLIMATE CHANGE

- 2.1. The survey opened by asking respondents for their views on a range of environmental issues such as global warming, and their relative importance.

### Global Warming

- 2.2. First respondents were asked for their views of global warming, including whether it is taking place at the moment, whether it will accelerate and if they felt that global warming was being accelerated by human activity (Table 2).
- 2.3. While there was a strong feeling within the Panel that global warming is definitely happening at the moment, views were more mixed as to the extent to which it will accelerate over the next few decades and the impact of human activity on any acceleration.
- 2.4. More than 9 in 10 respondents felt that global warming was definitely or possibly happening now (97%), including more than 3 in 5 who felt that global warming was “definitely” happening (61%). Only 1% said they felt global warming was “definitely not” happening now.
- 2.5. In terms of the extent to which global warming will accelerate over the coming decades, while more than 9 in 10 felt it would accelerate (93%) respondents were less clear that it will “definitely” do so (40%). Similarly on the extent to which human activity is accelerating global warming, nearly 9 in 10 respondents felt this was the case (87%). This included more than 2 in 5 who felt human activity was “definitely” having an impact (45%).

**Table 2: Existence of global warming**

	<b>Definitely</b>	<b>Possibly</b>	<b>Definitely not</b>	<b>Don't know</b>
Global warming is taking place at the moment	61%	36%	1%	2%
Global warming will accelerate over the next few decades	40%	53%	2%	6%
Global warming is being accelerated by human activity	45%	42%	6%	7%

- 2.6. Looking in more detail at the views of respondents there is some evidence of variation in attitudes within the Panel.
- Younger respondents (aged under 40) were the most likely to believe global warming is happening at the moment, and were also more likely than others to feel that global warming was “definitely” going to accelerate over the coming decades.
  - There was no significant difference between genders with regard to whether or not global warming was happening now, but female respondents were somewhat more likely to feel that it was going to accelerate in the coming decades.

- Respondents from the Fochabers area were the most likely to believe global warming was “definitely” happening now and would accelerate in coming decades, while those in Speyside were the least likely to indicate this.
- 2.7. A similar question was asked in a survey undertaken by YouGov for the Daily Telegraph in 2006. Panel members’ views differ slightly, being more likely than YouGov survey respondents to believe global warming is taking place at the moment (+12%). Moreover, Panel members were more likely to believe that global warming will accelerate over the next few decades (+14%). However, it should be noted that the YouGov survey was in the form of a simple yes/ no question (rather than definitely/possibly scale) and this may account for some of the variation in responses.
- 2.8. Respondents were next asked about the extent to which they thought global warming would change their lives and the lives of future generations (Table 3).
- 2.9. Looking firstly at the effect of global warming on respondents’ own lives, it is interesting to note that nearly a third (31%) believed that global warming would make no real difference to their lives - and a further 13% did not know what kind of impact it would have.
- 2.10. Of those who felt global warming would have some impact on their lives, most felt it would make their life worse; more than 2 in 5 (41%) indicated this, including 1 in 10 who felt it would make their lives “much worse”. Nevertheless, there remained around 1 in 6 who felt that global warming would make their lives better (16%).
- 2.11. Panel members were more negative in terms of the impact of global warming on the lives of future generations; the majority believed global warming would make life worse for future generations (66%). Indeed, more than 2 in 5 respondents which believed global warming would make life “much worse” for future generations (42%). Fewer than 1 in 10 respondents felt that global warming would make life better for future generations (8%).

**Table 3: Effect of global warming**

	Your Life		Lives of future generations	
	N	%	N	%
Make life much better	23	3%	18	2%
Make life a little better	97	13%	46	6%
Make no real difference	240	31%	53	7%
Make life a little worse	238	31%	181	24%
Make life much worse	80	10%	322	42%
Don't know	97	13%	143	19%
Base	775		763	

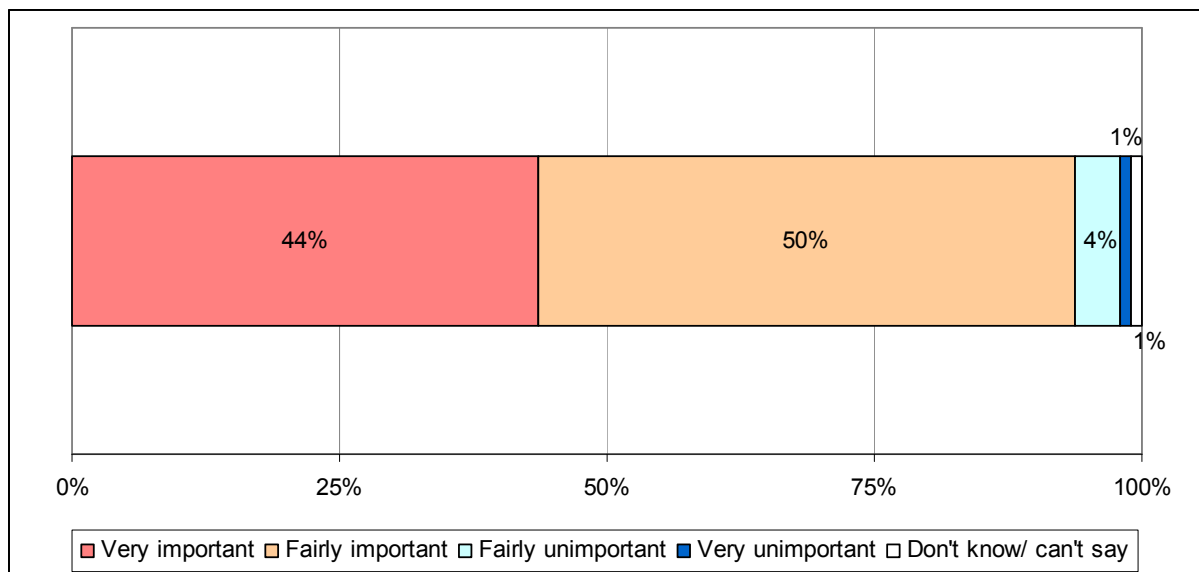
- 2.12. Again there is evidence of variation within the Panel. Here, for the purpose of analysis, the categories have been condensed into a scale of ‘better’, ‘no change’ and ‘worse’.

- Those aged under 40, were significantly more likely than older respondents, and particularly those aged 60+, to believe global warming would make their lives worse. Similarly, younger respondents were more likely to consider global warming would make the lives of future generations worse.
  - Male respondents were less likely than females to think that global warming would make their lives worse (-15%).
- 2.13. As might be expected there appears to be correlation between the belief that global warming will accelerate over the coming decades and the belief that global warming will make life much worse for children/ grandchildren/ future generations. As many as 7 in 10 (70%) of those who felt that global warming will “definitely” accelerate also felt that global warming would make life “much worse” for future generations. In contrast only 1 in 4 (25%) of those who felt global warming would “possibly” accelerate felt it would make future generations lives “much worse”.
- 2.14. Again comparable results are available from the YouGov survey of 2006. Here the views of Panel members are very similar with regard to views on the impact of global warming on their own lives, but Panel members were -6% less likely than YouGov respondents to believe that global warming will make life much worse for future generations.

**Environmental Issues**

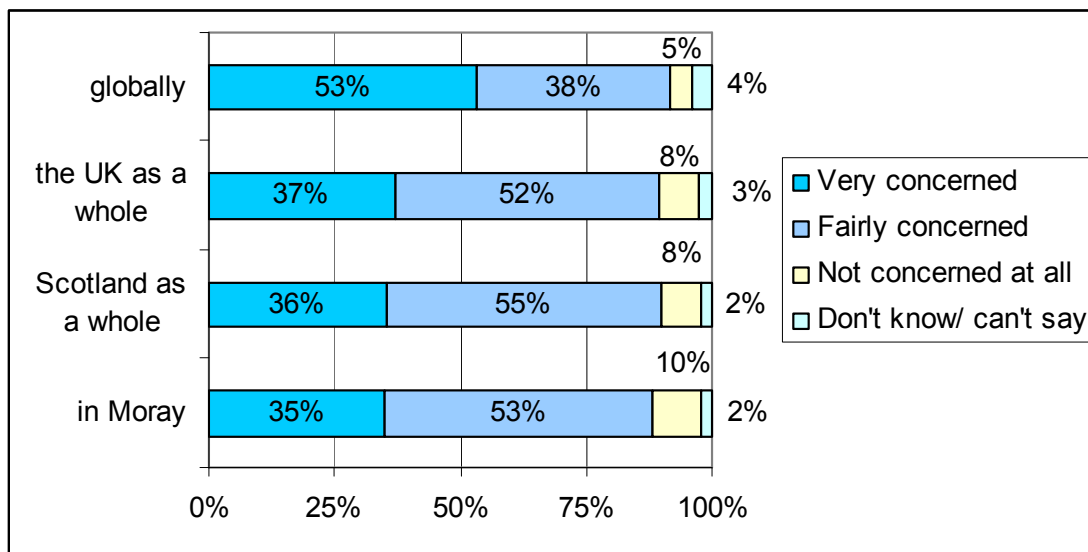
- 2.15. Respondents were next asked about the importance of the environment and environmental issues to them personally (Figure 1).
- 2.16. The overwhelming majority of respondents indicated that the environment and environmental issues were either important to them personally (94%). Indeed, more than 2 in 5 (44%) considered the environment to be “very” important to them personally. Only 1 in 20 felt that the environmental was unimportant to them personally (5%).

**Figure 1: Importance of environmental issues**



- 2.17. While the great majority of respondents across all groups indicated that the environment was important to them personally, there remained some significant variation. In particular, those aged under 40 were the least likely to feel that the environment was “very” important to them, while females were +13% more likely than males to consider the environment “very” important. In terms of area Elgin respondents were most likely to see the environment as “very” important, and those from the Lossiemouth area the least likely.
- 2.18. Respondents were next asked about the relative concerns they had regarding environmental issues locally and in the wider world (Figure 2).
- 2.19. It is unsurprising given the high importance placed on the environment and environmental issues, that the Panel were concerned about the environment both at a local level and globally. Indeed survey data suggests that respondents are somewhat more concerned about environmental issues globally than within the UK.
- 2.20. More than half of respondents was very concerned about environmental issues globally (53%), compared to around a third of respondents in relation to Moray (35%), Scotland (36%) and the UK as a whole (37%). There was a corresponding variation in the proportion not concerned at all; 1 in 10 respondents were not concerned about environmental issues in Moray (10%), but only 1 in 20 were not concerned about the issues globally (5%).

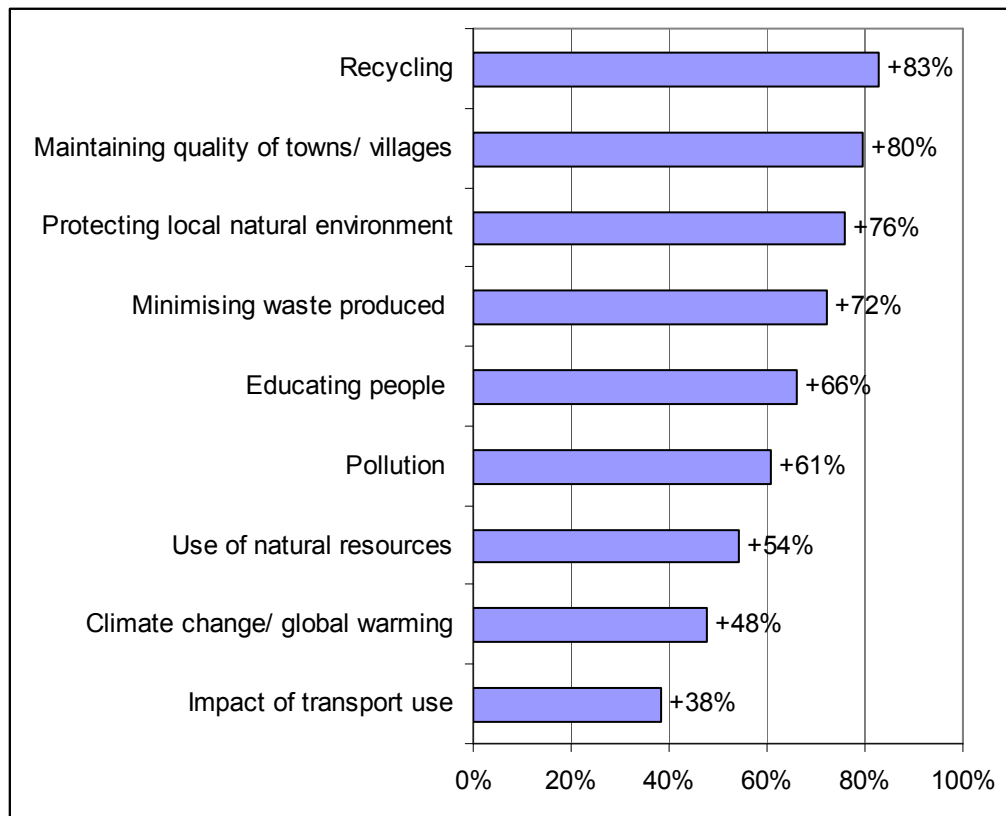
**Figure 2: Concern about environmental issues**



- 2.21. Again there is evidence of variation in attitudes within the Panel
- Those aged under 40 were most concerned about the environment at all levels, while those aged 40-49 were somewhat less concerned than others particularly at the Moray and Scotland level.
  - Female respondents were more concerned about the environment than males particularly at a Moray, Scotland and UK level.

- Those in the Fochabers, and to some extent Keith areas were most concerned about the environment. In contrast, Elgin area respondents were least concerned about the environment at a Scotland, UK and global level.
- 2.22. Respondents were next asked to indicate how important they felt a number of environmental issues were to the people of Moray in general (Figure 3).
- 2.23. While all issues were given a positive net importance rating, there remained significant variations with respondents generally more concerned about local issues. In particular recycling, maintaining the quality of towns/ villages and to a lesser extent protecting the local natural environment were rated as particularly important issues (+83%, +80% and +76% respectively). These more local issues were rated as significantly more important than wider issues such as pollution, use of natural resources and climate change/ global warming (+61%, +54% and +48% respectively).
- 2.24. Minimising waste (+72%) and educating people about environmental issues (+66%) were also considered to be important issues, and in particular were seen as more important than the impact of transport use on the environment (+38%). This may be a reflection of the areas general reliance on the car.

**Figure 3: Importance of key environmental issues to people in Moray**



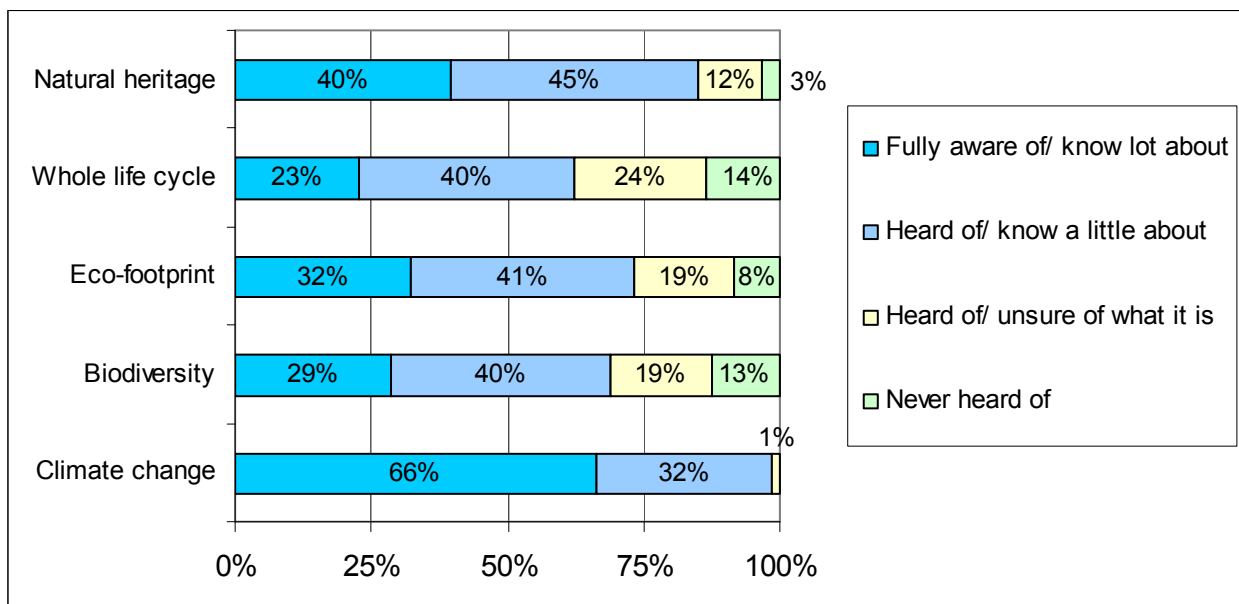
- 2.25. Again there is some evidence of variation within the Panel.
- Those aged 60+ gave all the issues a higher net importance than younger respondents, particularly in relation to climate change/ global warming.



- There was no significant variation between the genders for most issues, with the only exceptions being the impact of transport use and protecting the local natural environment. Female respondents gave the former a higher net importance while males gave the latter a higher net importance rating.
- Respondents from the Buckie area gave higher net importance ratings across most of the environmental issues listed. In contrast, those from the Lossiemouth area gave the lowest important rating across all issues with the exception of recycling - indeed Lossiemouth residents saw recycling as more important than any other area.

- 2.26. In recent years a number of phrases and terms have emerged relating to the environment and environmental issues, and respondents were asked to indicate their level of awareness of these phrases (Figure 4).
- 2.27. “Climate change” was by far the best understood phrase, with almost all respondents having heard of the phrase (98%) and the majority indicating that they were “fully aware” of the phrase and its meaning (66%). This was the only phrase where those “fully aware” were in the majority.
- 2.28. “Natural heritage” was also a well understood phrase; more than 4 in 5 (85%) respondents had heard of the phrase and 2 in 5 were fully aware (40%). Respondents were somewhat less aware of the phrases “eco-footprint” and “biodiversity”. Although most had heard of these (73% and 69% respectively), fewer than 1 in 3 were fully aware of them and a similar proportion had never heard of or were unsure of what the phrases meant.
- 2.29. “Whole life cycle” was the least understood phrase; fewer than 1 in 4 respondents (23%) were “fully aware” of this and around 1 in 7 had never heard of the phrase (14%).

**Figure 4: Awareness of environmental terms/ issues**



- 2.30. As might be expected there is some evidence of variation in understanding within the Panel. In terms of age, it is interesting to note that the younger (under 40) and older (60+) respondents were significantly less aware of the phrases than those in the middle age bands (40-59). Looking at area, Elgin and Lossiemouth respondents were notably less aware of the phrases than those in other areas.
- 2.31. It is also interesting to compare Panel members' awareness of these environmental terms with areas outwith Moray. A survey of Aberdeenshire Citizens' Panel members in 2005 found lower awareness of these terms. Awareness of the term "biodiversity" was -8% lower than reported in the current survey, and awareness was as much as -41% lower than the current survey in relation to the term "ecological footprint". However, it should be noted that awareness of environmental terms is likely to have increased across most areas since the Aberdeenshire survey was conducted in 2005. Differences in findings are likely to reflect at least in part wider changes in awareness over the past 2 years.<sup>3</sup>
- 2.32. A national survey conducted on behalf of Scottish Natural Heritage in 2005 also suggests that awareness of environmental terms may be relatively high in Moray. Findings from this 2005 survey suggest that awareness of the term "natural heritage" amongst Panel members is fairly similar to the wider population (85% of Panel members compared to 90% of 2005 survey participants). However, Panel members are more likely to indicate awareness of the term "biodiversity" (69% of Panel members compared to 51% of 2005 survey participants).
- 2.33. The next section of the survey looks at respondents' views on the impact of environmental issues on their own lives.

---

<sup>3</sup> It is notable that the difference in awareness was particularly marked in reference to the term "ecological footprint", and this may reflect the relatively recent use of the term "carbon footprint" in discussion of environmental issues.

### 3. THE IMPACT OF ENVIRONMENTAL ISSUES ON YOUR LIFE

3.1. In this section respondents were asked more specifically about whether environmental issues or concerns have had an impact on their own views and behaviour.

#### Problems

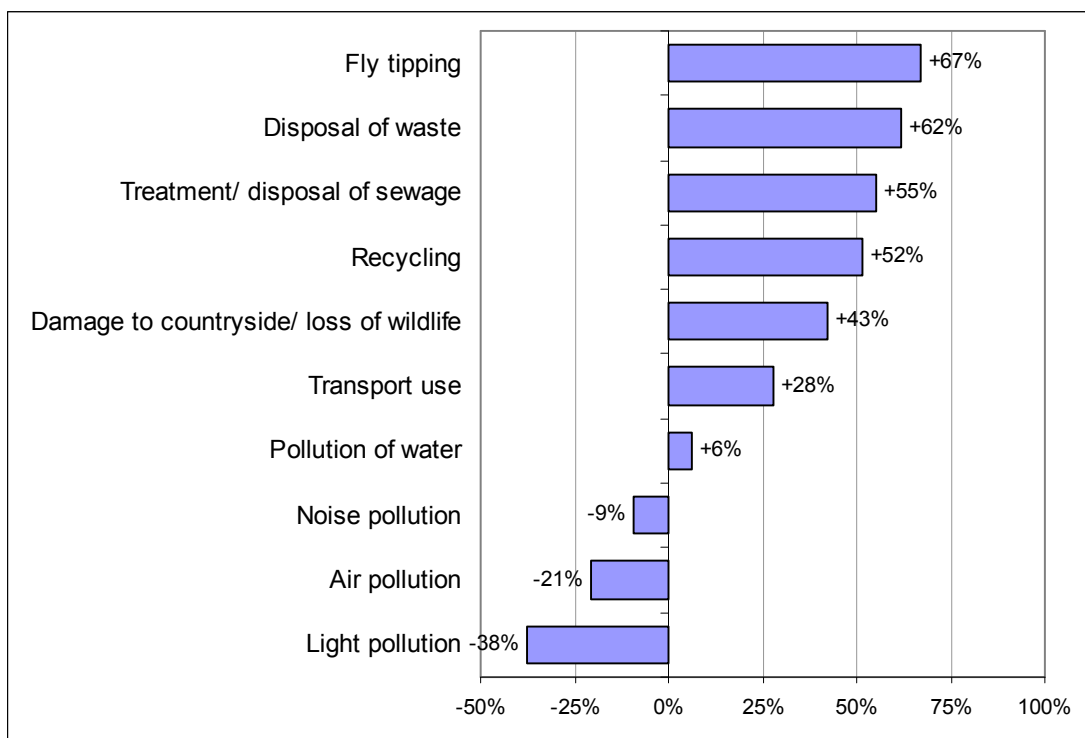
3.2. Firstly respondents were given a series of environmental issues and asked the extent to which they felt they were a problem in the Moray area (Figure 5).

3.3. It is clear that waste is seen as the most serious environmental problem in Moray – fly tipping, disposal of household/ business waste, sewage treatment and recycling were seen as the main environmental problems locally (+67%, +62%, +55% and +52% respectively). Damage to the countryside (including loss of wildlife) and transport were the only other issues seen as a problem for the Moray area, with net ratings of +43% and +28% respectively.

3.4. Pollution was seen as significantly less of a problem for the Moray area. Respondents were somewhat divided in their views on water and noise pollution, with around half seeing these as problems and a similar proportion indicating that they were not very or not at all serious problems in Moray (+6% and -9% respectively).

3.5. Respondents were clearer in their views that air pollution and light pollution are not serious problems in Moray. The majority of respondents felt that these problems were not very or not at all serious, and these were the only issues given a clearly negative “net seriousness” rating (-21% and -38% respectively).

**Figure 5: Net seriousness of environmental issues in Moray**



- 3.6. As one might expect, key groups within the Panel have different views on the seriousness of environmental issues.
- Older respondents (aged 60+) were more inclined to view issues as very or fairly serious problems, while those aged under 40 were less so. This was particularly the case with regard to the treatment and disposal of sewage and damage to the countryside.
  - Female respondents were similarly more likely to consider these issues to be serious problems. In particular female respondents were more likely than males to see the impact of transport use and damage to the countryside as serious problems.
  - Across geographical areas there were a number of similarities in the problems which were identified. The impact of fly tipping, disposal of household waste, treatment and disposal of sewage and recycling were identified as serious problems by all areas.
  - However, there were notable area variations in views of noise pollution, air pollution and pollution of water. Respondents from the Lossiemouth area were the only group to see noise and air pollution as a serious problem. These respondents, together with those from the Buckie area were also most likely to see water pollution as a serious problem.
- 3.7. There were also some notable differences in the extent to which Panel members felt that specific environmental issues were fairly or very serious problems, when compared with results from a 2002 national Survey on Environmental Issues conducted for the Scottish Executive.<sup>4</sup>
- 3.8. Panel members were much less likely than 2002 survey respondents to see air and water pollution to be a serious problem, being -50% less likely to mention air pollution and -17% less likely to mention water pollution as problems. In contrast, Panel members and 2002 survey respondents were very similar in their views that treatment/disposal of waste and damage to the countryside were serious problems.
- 3.9. Respondents were next asked to consider possible courses of action and to suggest which they considered most important in tackling the aforementioned issues (Table 4).
- 3.10. More action by the UK government, by other agencies and more public concern on environmental issues were identified as the most important actions for tackling the environment - these were mentioned respectively by 76%, 74% and 70% of respondents.

---

<sup>4</sup> It should be noted that the 2002 national survey used a face to face rather than postal self completion survey methodology, and this may account in part for differences in findings.

- 3.11. In terms of action by public bodies it is notable that respondents were much more likely to highlight the need for more action by the UK government and other agencies, than by local Councils or the Scottish Executive. Indeed more action by the Scottish Executive was the lowest ranked of the specific actions listed. Respondents were also more likely to mentioned a need for more action by industry than action by Councils or the Scottish Executive.
- 3.12. In terms of public attitude it is interesting that more public concern on environmental issues was identified as important by more than twice as many respondents as greater public awareness, suggesting that the Panel feels that the public are aware of environmental issues but are not sufficiently concerned about them. However, it should be noted that those who did feel greater public awareness was needed tended to feel this was the most important action. Indeed greater public awareness was more likely to be identified as most important than any other action.

**Table 4: Important actions for tackling the environment**

	1st	2nd	3rd	ALL		Rank
More action by the UK government	14%	9%	7%	593	76%	1
More public concern on environmental issues	13%	14%	12%	577	74%	2
More action by other agencies	1%	3%	3%	545	70%	3
More information available on these issues	3%	7%	8%	503	65%	4
More action by industry to tackle these issues	9%	13%	16%	469	60%	5
More action by local Councils	14%	17%	21%	380	49%	6
More laws/ legislation	10%	3%	4%	359	46%	7
Greater public awareness of environmental issues	21%	18%	12%	247	32%	8
More action by the Scottish Executive	9%	14%	13%	203	26%	9
Other	7%	2%	3%	113	15%	
Base	757	749	716	779		

### Lifestyle

- 3.13. Firstly respondents were given a series of positive and negative statements and asked to indicate the extent to which they agreed or disagreed with them.
- 3.14. The majority of respondents think about the environmental effect of their lifestyle, with nearly 3 in 4 disagreeing that they never think about this (-58%). Respondents also seem to feel that individuals can have an impact on the environment; there was strong net disagreement that there's not much respondents can do personally to protect the environment (-71%). Similarly, there was net disagreement that industry is mainly to blame for harm to the environment (-12%), although respondents were more divided in their views here - nearly 1 in 3 agreed that industry is mainly to blame.
- 3.15. Respondents also felt that they should personally do more to protect the environment, with net agreement of +48% and just c1 in 7 disagreeing with this. However, views were more divided in terms of awareness of how individuals can help. Although most disagreed that they are unsure of what lifestyle changes to make (net -25%) and that they do not have enough information (net -25%), there remained c1 in 4 who did not have enough information to decide which changes to make.

**Table 5: Agreement with statements in relation to environmental issues.**

	<b>NET</b>	<b>Strongly agree</b>	<b>Agree</b>	<b>Neither / nor</b>	<b>Disagree</b>	<b>Strongly disagree</b>	<b>Don't know</b>
I feel that I should do more to protect the environment	<b>+48%</b>	10%	52%	23%	12%	3%	1%
Industry is mainly to blame for harm to the environment rather than the public	<b>-12%</b>	7%	24%	26%	36%	6%	2%
I'm not sure what changes I can make in my lifestyle to help the environment	<b>-25%</b>	2%	23%	23%	41%	9%	1%
I do not have enough information to help me make environmental choices	<b>-25%</b>	3%	23%	21%	40%	12%	1%
I never really think about the effect my lifestyle is having on the environment	<b>-58%</b>	3%	13%	11%	43%	31%	0%
There's not much I can do personally which will help protect the environment	<b>-71%</b>	2%	9%	9%	48%	33%	1%

3.16. Within the Panel there is clear evidence of variation in attitude.

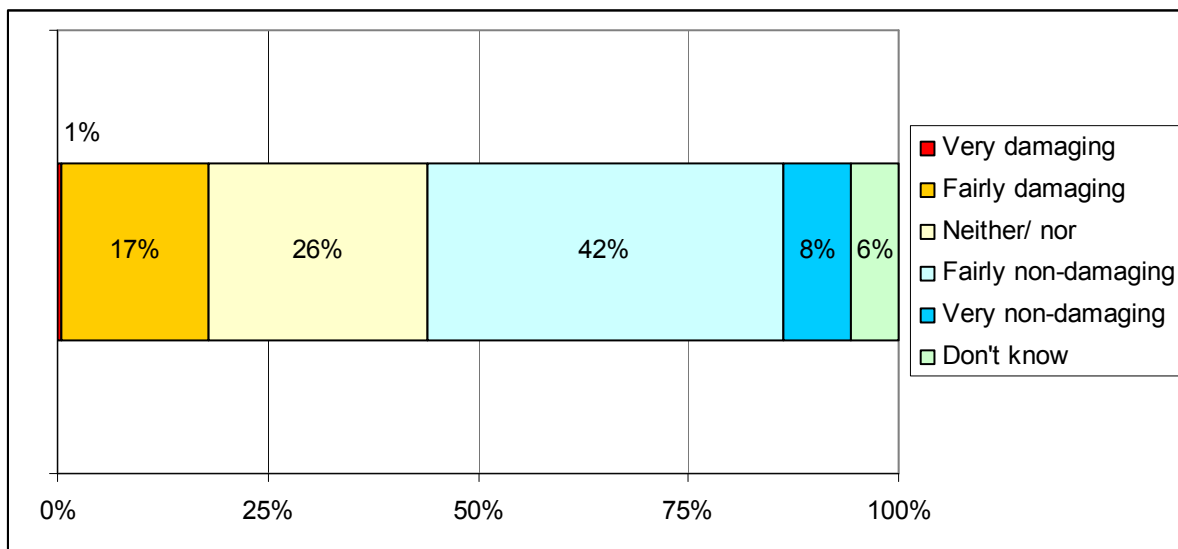
- Those aged under 40, and to some extent 40-49, appear more environmentally conscious than others. These age groups were less likely to say that they never think about their effect on the environment, and agreed that there was more they could do personally.
- Female respondents appear more environmentally conscious, particularly in terms of being more likely to consider the effect of their lifestyle on the environment and to feel that there was more that they could do.
- Respondents from the Fochabers area were the most environmentally conscious; they were more likely than others to consider the effect of their lifestyle and less likely to feel that they don't know how to support the environment. Respondents from the Elgin area were the least conscious or concerned about the environment.
- 

3.17. Again there were some notable differences in views expressed by Panel members and respondents to the 2002 national Survey on Environmental Issues. In particular, Panel members were less likely to agree that they did not know what changes they could make to help the environment (-23% compared to the 2002 survey). Similarly, Panel members were less likely to agree that they do not consider the impact of their lifestyle on the environment (-29%). However, it should be noted that such differences may reflect in part a general increase in awareness of environmental issues in the years since the 2002 survey.

3.18. Following on from the above statements, respondents were asked to judge how damaging they felt their own lifestyle was for the environment (Figure 6).

- 3.19. Respondents generally felt that their own lifestyles were non-damaging; half considered their lifestyle to be non-damaging (50%) and fewer than 1 in 5 felt it to be damaging (18%). However, there remained nearly a third of respondents who did not give a clear positive or negative answer; 32% selected “neither/ nor” or “don’t know”.

**Figure 6: How damaging is your personal lifestyle?**



- 3.20. As might be expected the perceived damage of people’s lifestyles varies across the Panel.
- Respondents aged under 50 generally felt their lifestyles were more damaging than those aged 60+.
  - Respondents from the Keith and Lossiemouth areas were the most likely to consider their lifestyle as environmentally damaging, whilst those from the Forres and Speyside area were the least likely.
- 3.21. Respondents were then asked specifically about the practical measures they had undertaken in the last 12 months a result of environmental concerns (Table 6).
- 3.22. It is notable that the most common actions were those which involved more minor changes in behaviour. In particular, more than 9 in 10 respondents had saved electricity by switching off appliances (92%) and more than 4 in 5 had reused shopping bags (85%). Use of energy-saving light bulbs (77%) and choosing local produce (67%) were also common. Indeed, respondents were more than twice as likely to choose local produce as a result of environmental concerns, than to choose organic produce.

- 3.23. Although the most common actions involved relatively minor behavioural changes, there remained a substantial proportion of respondents who reported having made more significant changes to their lifestyles as a result of environmental concerns. For example, changes in transport use were mentioned by more than half of respondents; walking/ cycling instead of using a car was mentioned by 55%, and using public transport instead of a car for work or other journeys by 36%. In addition, a substantial proportion of respondents had chosen more energy efficient appliances and/or composted their kitchen waste (57% and 44% respectively).
- 3.24. More than 1 in 7 respondents (15%) selected other as one of their actions. Of those which provided an other action the most common were recycling, planting trees and growing own vegetables. Practical features such as installing loft insulation and changing to different fuels such as wood or bio-fuel were also mentioned.

**Table 6: Actions taken in the last 12 months**

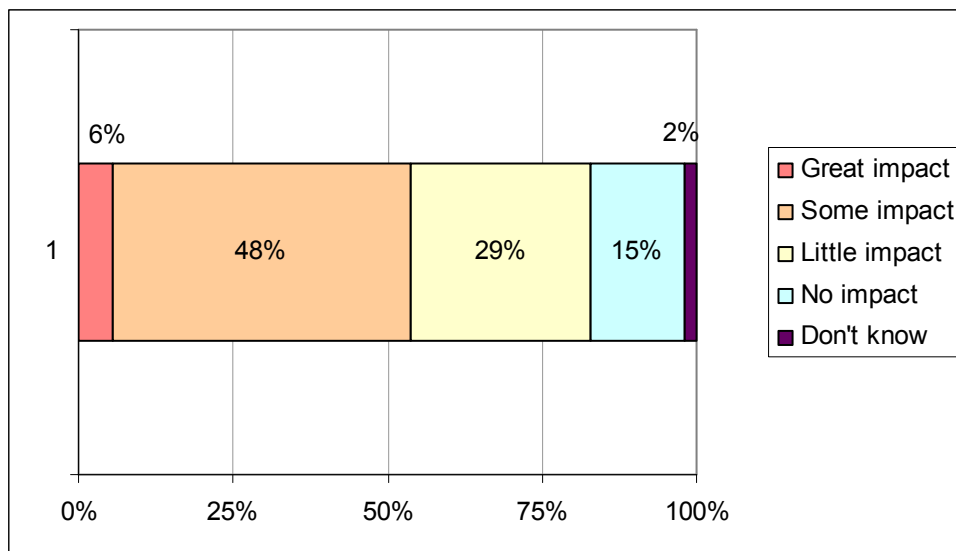
	N	%
Saved electricity/ fuel in your home (eg switching off appliances when not needed)	722	92%
Reused shopping bags	663	85%
Used energy-saving light bulbs at home	605	77%
Chosen local produce	521	67%
Chosen more energy efficient appliances for your home	444	57%
Walked or cycled instead of using the car	431	55%
Composted kitchen waste	341	44%
Used public transport instead of the car - for other journeys	256	33%
Chosen organic produce	235	30%
Used public transport instead of the car - for work	79	10%
Bought reusable "real" nappies	12	2%
Other (please write in)	117	15%
I have not taken any action in the last 12 months (go to Q13)	13	2%
Base	783	

- 3.25. In terms of age variations, it is notable that under 50s were more likely to have walked or cycled instead of using a car, while those aged 60+ were more likely to have used public transport instead of a car. Looking at gender, females were more likely than males to have reused shopping bags, chosen local or organic produce and used public transport instead of a car. There were few significant variations in environmental action by area, although it is notable that those in Elgin were most likely to have walked or cycled instead of using a car, while those in the Fochabers and Speyside areas were most likely to have composted their kitchen waste.
- 3.26. Respondents were next asked about the impact of publicity on their decisions to change their behaviour (Figure 7).



- 3.27. Most respondents stated that publicity on environmental issues and actions had at least some impact on their behaviour (54%), although only c1 in 20 indicated that publicity had a “great” impact. Only a little over 1 in 7 said publicity had no impact (15%).

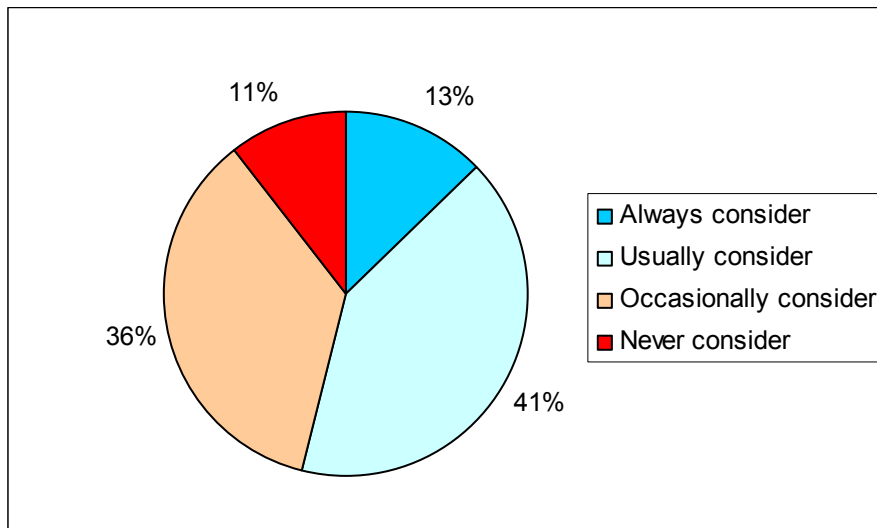
**Figure 7: Impact of recent publicity on behaviour**



- 3.28. Further analysis of survey responses suggests a correlation between the impact of publicity and undertaking some of the actions listed at Table 6). In particular respondents who felt influenced by publicity were more likely to have walked, cycled or used public transport instead of a car (for work or other journeys) and to have switched to energy saving light bulbs.

### **Buying Goods**

- 3.29. Respondents were next asked about the goods they purchase and the extent to which environmental concerns impact on their buying choices (Figure 8).
- 3.30. First the survey asked about the extent to which respondents considered the environment when making ordinary purchases such as groceries etc. The majority of respondents indicated that they tend to give some consideration to the environment when making purchases (54%), although only a little over 1 in 10 “always” do this (13%).

**Figure 8: Consideration of the environment**

- 3.31. As might be expected the perceived damage of people's lifestyles varies across the Panel.
- Female respondents were significantly (+21%) more likely than male respondents to always or usually consider the environment when making purchase decisions.
  - Respondents from the Speyside area were the most likely to consider the environment and those from the Buckie and Elgin areas the least.
- 3.32. Next, respondents were asked to indicate how important they felt a series of factors were when buying goods. The factors ranged from practical elements such as packaging and product origin to wider issues such as quality, brand and advertising (Table 7).
- 3.33. It is notable that the factors identified as most important by respondents were not related to environmental considerations. Quality and cost/ value for money or products were each given an average importance rating of 9 (out of 10), and were significantly more likely than other factors to be ranked in the highest importance band (88% and 85% ranking in the 8 to 10 band).
- 3.34. In terms of more environment-related issues, the most common considerations for respondents were less or recyclable packaging, energy efficiency ratings and locally produced goods (each with an average rating of 8 out of 10).
- 3.35. It is interesting to note that brand and advertising/ appearance were rated as amongst the least important factors by respondents, with averages of just 4 out of 10 and 5 out of 10 respectively. Similarly, organic produce was seen as unimportant by most respondents (average 5 out of 10), and was rated significantly lower than locally produced goods for example.

**Figure 9: Importance of factors when making purchases**



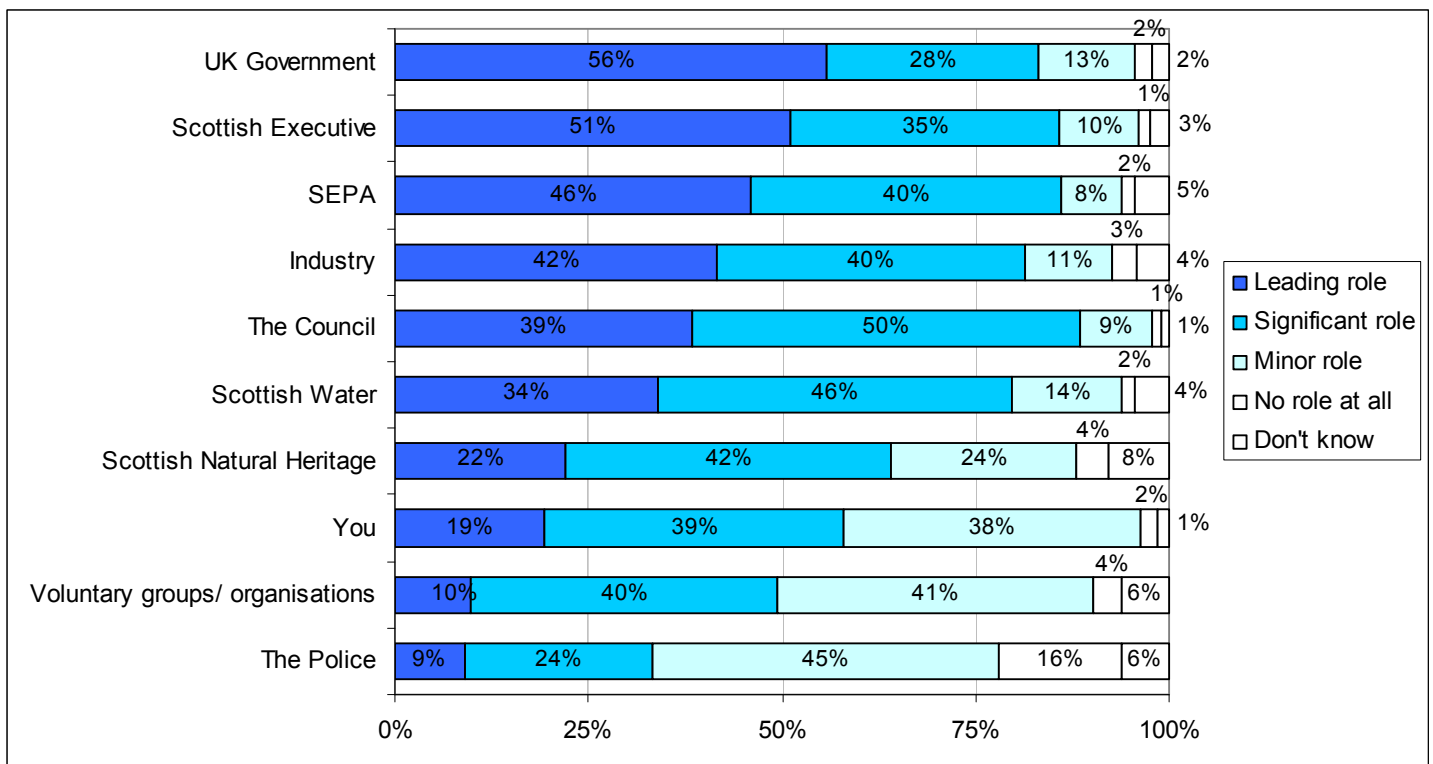
**4. ROLES AND ACTIONS**

4.1. Here respondents were asked about their awareness and views on action being taken to tackle environmental issues at a Moray and UK-wide level.

**Who should tackle environmental issues**

- 4.2. First respondents were asked about how they saw the role of a range of organisations in terms of tackling environmental issues (Figure 10).
- 4.3. Respondents were clear in their view that the UK government and the Scottish Executive should take the lead role in tackling these issues. These were the only bodies which more than half of respondents felt should take a “leading” role (56% and 51% respectively). SEPA was the only other national organisation which a significant proportion of respondents felt should have a “leading” role in environmental issues (46%).
- 4.4. Although respondents were somewhat more likely to identify industry rather than The Moray Council as having a leading role in tackling environmental issues (42% and 39% respectively), respondents were more likely to indicate that the Council should have a “significant” role. Indeed in total nearly 9 in 10 respondents felt that the Council should have a leading or significant role in environmental issues (89%), higher than even for the UK government or Scottish Executive.
- 4.5. In terms of individuals’ role in tackling environmental issues, respondents ranked this below almost all other listed organisations. Nevertheless, there remained more than half of respondents (58%) who felt that local residents should have a leading or significant role in tackling environmental issues.

**Figure 10: Perceived role in tackling pollution and environmental issues**



- 4.6. Further analysis of the responses shows that within the Panel there are significant differences in the perceived roles of these organisations.
- Older respondents (aged 60+) were much more likely to see the Council as having a leading in environmental issues. In contrast, those aged under 40 were more likely than others to perceive a leading role for the UK government, while those aged 50-59 were more likely to see a leading role for industry.
  - Female respondents were generally more likely than males to indicate a leading role for almost all of the organisations, particular in relation to Scottish Natural Heritage and the Scottish Environment Protection Agency (SEPA). Male respondents were more likely than females to see a leading role for the UK government.

### Actions to tackle environmental issues

- 4.7. Respondents were next asked about their awareness of the actions currently being taken by the aforementioned organisations (Table 7).
- 4.8. While the majority of respondents have heard of action being taken by the organisations, most are not aware of what this action involves. Awareness was highest in relation to action being taken by the Council; more than 9 in 10 (92%) indicated that they knew about action being taken by the Council, although only around 3 in 10 felt they were “fully aware” of what this involves.
- 4.9. Respondent awareness was also high in relation to action taken by the UK government and Scottish Executive, with more than 4 in 5 aware of action being taken (82% and 81% respectively). However, again few respondents indicated that they were “fully aware” of action being taken by government on environmental issues (17% and 16%).
- 4.10. Awareness of environmental action was lowest for voluntary groups and the Police, with only a little over 1 in 20 “fully aware” of what these organisations are doing (7% and 6% respectively). Moreover, nearly 3 in 10 respondents indicated that they had “never heard of” environmental action being taken by the Police (29%).

**Table 7: Awareness of actions to tackle the issues**

	Fully aware/ know a lot about	Heard of/ know a little about	Heard of/ unsure what it is	Never heard of
The Council	31%	61%	7%	2%
UK Government	17%	65%	16%	3%
Scottish Executive	16%	65%	16%	4%
Scottish Environmental Protection Agency	16%	56%	22%	6%
Scottish Natural Heritage (SNH)	12%	47%	30%	11%
Scottish Water	11%	57%	25%	7%
Industry	7%	54%	27%	11%
Voluntary groups/ organisations	7%	49%	30%	14%
The Police	6%	35%	30%	29%

- 4.11. There is some evidence of variation in the awareness of different groups within the Panel.
- Older respondents (aged 60+) tended to be more aware of action taken by the organisations, while under 40s were the most likely to state that they had never heard of the actions undertaken by the organisations.
  - Female respondents were more likely than males to be aware of action taken by the organisations, while males were more likely to state that they had never heard of the actions undertaken by the organisations.
  - In terms of area, awareness of environmental action was highest in the Fochabers area, while those in the Lossiemouth area were the most likely to say that they had never heard of action being taken to tackle pollution and environmental issues.
- 4.12. Respondents were next asked to suggest the most effective ways for the aforementioned organisations to inform members of the public about their activities, and to encourage the public to consider environmental issues/ their own environmental impact (Table 8).
- 4.13. Education/ awareness raising in schools and information provided through newspapers were seen as by far the most effective methods for these organisations to communicate on environmental issues (87% and 83% respectively mentioning). In particular it is notable that although ranked 2<sup>nd</sup> in terms of overall numbers mentioning, local newspapers was the method most likely to be identified as the single most effective method (by 35% of respondents). Newspapers were also seen as significantly more effective than leaflets delivered to the door (48%).
- 4.14. In terms of other communication channels, information provided through local public places such as Council offices or libraries (65%), through the workplace (56%) or through community groups (54%) were also seen as effective. Indeed these were the only other options mentioned by more than half of respondents.

**Table 8: Effective methods for disseminating information**

	1st	2nd	3rd	ALL		Rank
Education/ awareness raising in schools	21%	25%	19%	644	87%	1
Information in local newspapers	35%	18%	14%	370	83%	2
Information in local public places (Council offices, libraries, GP surgeries)	6%	16%	16%	501	65%	3
Information in the workplace	3%	9%	14%	672	56%	4
Information provided through community groups/ community councils	6%	8%	13%	264	54%	5
Leaflets/ flyers delivered to your door	19%	12%	7%	435	48%	6
Information on the internet/ via email	3%	5%	7%	274	35%	7
Public meetings/ events	6%	6%	8%	418	34%	8
Other	2%	1%	1%	51	7%	
Base	754	741	710	777		

## 5. ENERGY USE

5.1. This section considers the impact of individuals' energy use at home and in the workplace. Respondents were asked a series of questions regarding energy saving measures and why they have changed their behaviour.

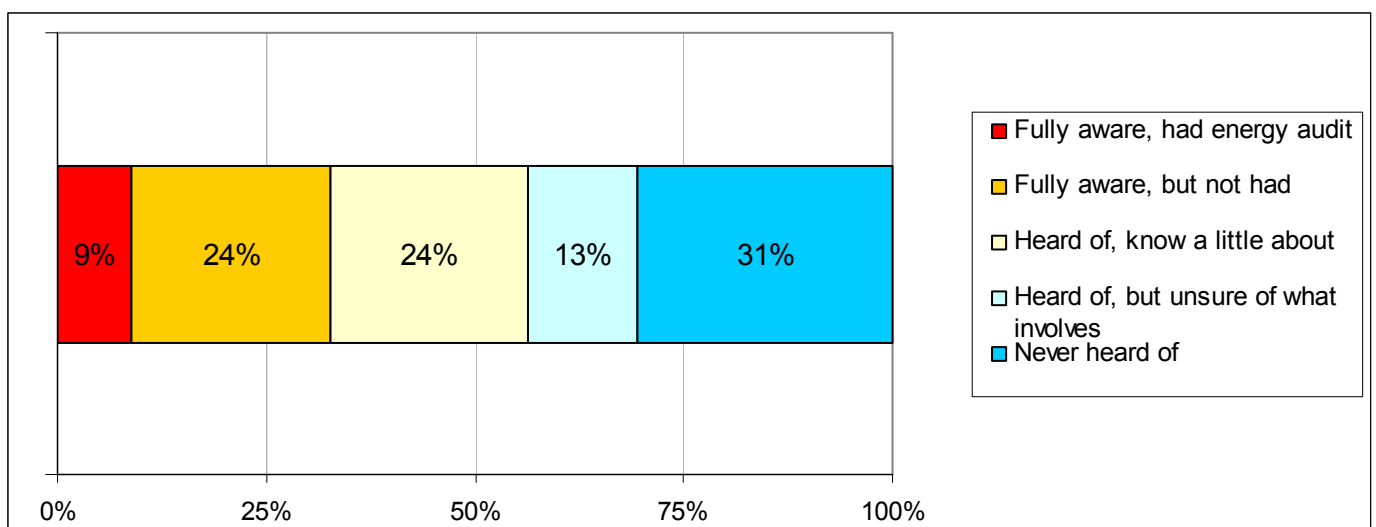
### In the Home

5.2. Respondents were first asked if they had heard of or undertaken an "energy audit" (Figure 11), and if so how useful this had been.

5.3. Fewer than 1 in 10 respondents indicated that they had undertaken an "energy audit" on their home (9%). Numbers are too small to permit robust analysis of how useful audits are for individuals, but survey responses suggest that respondents generally found them useful - a large majority of the 69 respondents who had undertaken an audit indicated that it had been useful.

5.4. In total more than half of respondents indicated that they knew at least "a little" about what an energy audit involved (57%), and a further 13% had heard of an audit but were unsure of what it involves. Nevertheless, there remained nearly 1 in 3 who indicated that they had never heard of an energy audit (31%).

**Figure 11: Awareness of the Energy Audit**



5.5. While there were no significant variations in awareness of an "energy audit" across age and gender groups, it is notable that those from the Forres, and to a lesser extent Speyside, areas were somewhat more likely than others to be aware of the term.

5.6. Respondents were next asked about energy saving measures they had installed in their homes within the last 12 months. Nearly half of respondents indicated that they had installed one or more such measures in their home (47%), and the profile of these measures is presented in Table 11.

- 5.7. Additional loft insulation, more energy efficient systems and double glazing were by far the most common measures installed, with each mentioned by nearly half of those who had installed energy saving measures (48%, 47% and 46% respectively). The only other measures mentioned by a substantial number of respondents were cavity wall insulation (14%) and water conservation (7%).
- 5.8. Numbers are too small to permit meaningful analysis of any variation across demographic groups in terms of the type of energy saving measures installed. However, there were notable area variations in the proportion of respondents who had installed any such measures; in particular those in the Forres area were most likely to have installed measures, while those in the Buckie and Lossiemouth areas were the least likely.

**Table 9: Energy saving measures installed within 12 months**

	<b>N</b>	<b>%</b>
Additional loft insulation	155	48%
Installed more energy efficient heating system/ boiler	151	47%
Installed double glazing	150	46%
Cavity wall insulation	44	14%
Installed water conservation measures	24	7%
Installed solar Panels	4	1%
Installed ground source heat pump	2	1%
Installed other renewable energy technology (eg wind turbine)	2	1%
Other	64	20%
Base	323	

- 5.9. Those who had installed energy saving measures in the last 12 months were also asked about their motivations for doing so (Table 10).
- 5.10. Respondents were very clear that the main reason for installing energy saving measures was to reduce home energy costs; the great majority of those who had installed measures indicated that reducing costs was a “very important” reason for doing this (83%).
- 5.11. Indeed, reducing costs was nearly three times more likely than environmental concerns to be identified as a very important reason for installing measures (83% compared to 28% for environmental concerns). Relatively few respondents indicated that availability of grants was a reason for their installing energy saving measures (just 16% very important).

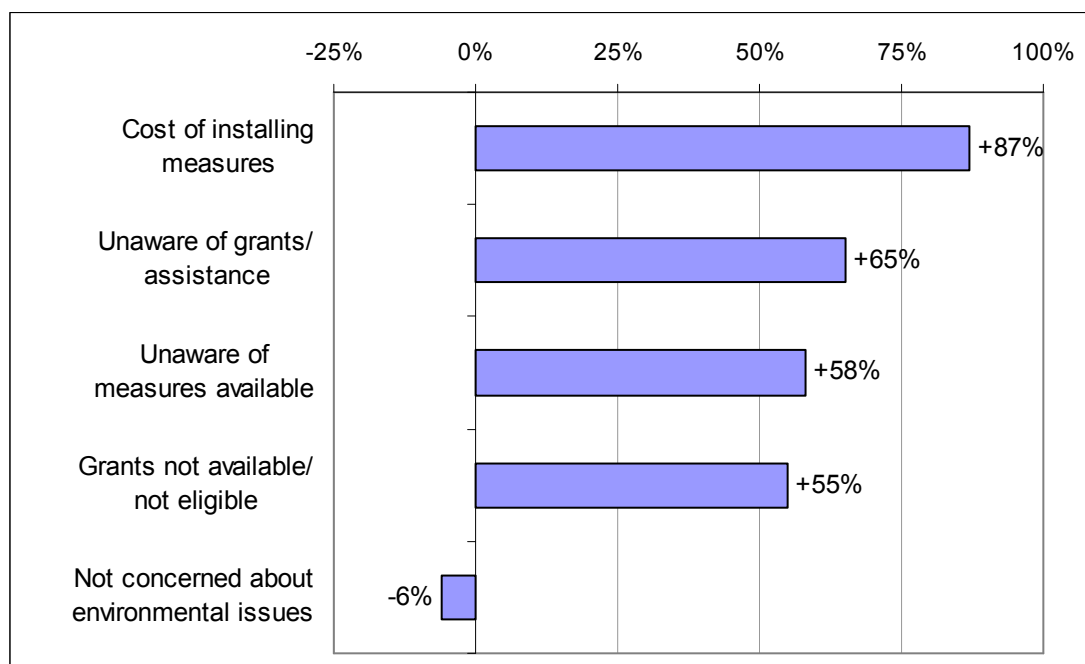
**Table 10: Importance of motivating factors**

	<b>Very important</b>	<b>Fairly important</b>	<b>Fairly unimportant</b>	<b>Not at all important</b>	<b>Can't say</b>
Environmental concerns	28%	51%	16%	2%	3%
Reducing home energy costs	83%	13%	2%	0%	1%
Availability of grants to install measures	16%	15%	12%	26%	32%



- 5.12. Finally on energy use in the home, all respondents were asked to rate the importance of a range of potential barriers to their installing energy saving measures in the future (Figure 12).
- 5.13. The cost of installing energy saving measures was identified by respondents as the most important barrier to installing energy saving measures in the future (net rating +87%). This was seen as a considerably more important barrier than other issues listed, indeed nearly two thirds of respondents (65%) saw this as a “very important” barrier to their installing energy saving measures.
- 5.14. A lack of awareness of grants or help available to install energy saving measures was also identified as an important barrier (+65% net rating), as was grants not being available or respondents not being eligible for assistance (+55%). Clearly this are significant issues in light of respondents’ rating of the cost of measures as the most important barrier. A lack of awareness of the measures available was also identified as a significant barrier, with a net rating of +58%.
- 5.15. A lack of concern about environmental issues was not generally seen as a potential barrier to installing energy saving measures, with a negative net importance rating of -6%. Nevertheless, it is worth noting that more than 2 in 5 respondents (41%) indicated that a lack of concern was a very/ fairly important barrier to their installing energy saving measures.

**Figure 12: Net importance of barriers to installing energy saving measures**

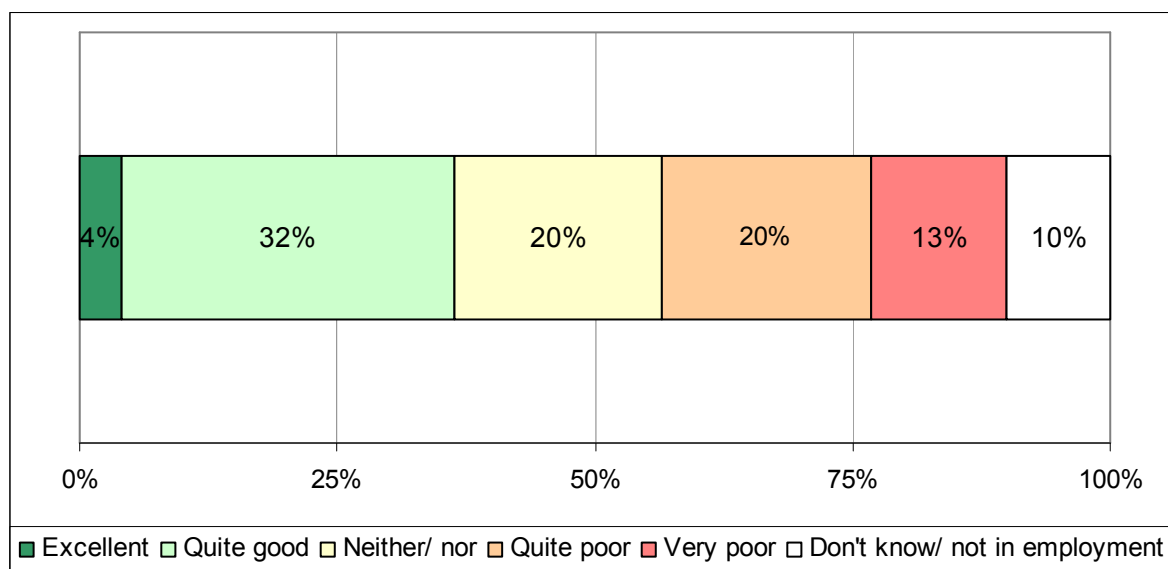


- 5.16. The most significant variations in rating of potential barriers was across age groups, although it should be noted that the cost of installing measures was the main barrier across all groups. Nevertheless, this was more of an issue for younger respondents (particularly those aged under 40), as was a lack of awareness of grants/ assistance. In contrast, older respondents were significantly more likely than others to identify lack of concern about the environment as an important barrier.

### In the workplace

- 5.17. Respondents were next asked about the energy efficiency of their work place (Table 11) and any energy saving measures implemented by their employers (Table 12).
- 5.18. Views were somewhat mixed, with just over 1 in 3 respondents giving their employers an excellent or very good rating in terms of energy efficiency (36%), and only slightly fewer giving a quite or very poor rating (33%).
- 5.19. However, there was some significant variation in ratings across key demographic groups. In particular, younger workers (aged under 40) were more likely than others to give a “poor” rating to employers; indeed this was the only age group for which the negative ratings outnumbered the positive ratings. In terms of area, workers in the Elgin and Lossiemouth areas were most negative about their employers’ energy efficiency, while Fochabers respondents were most positive.

**Figure 13: Energy efficiency of employer**



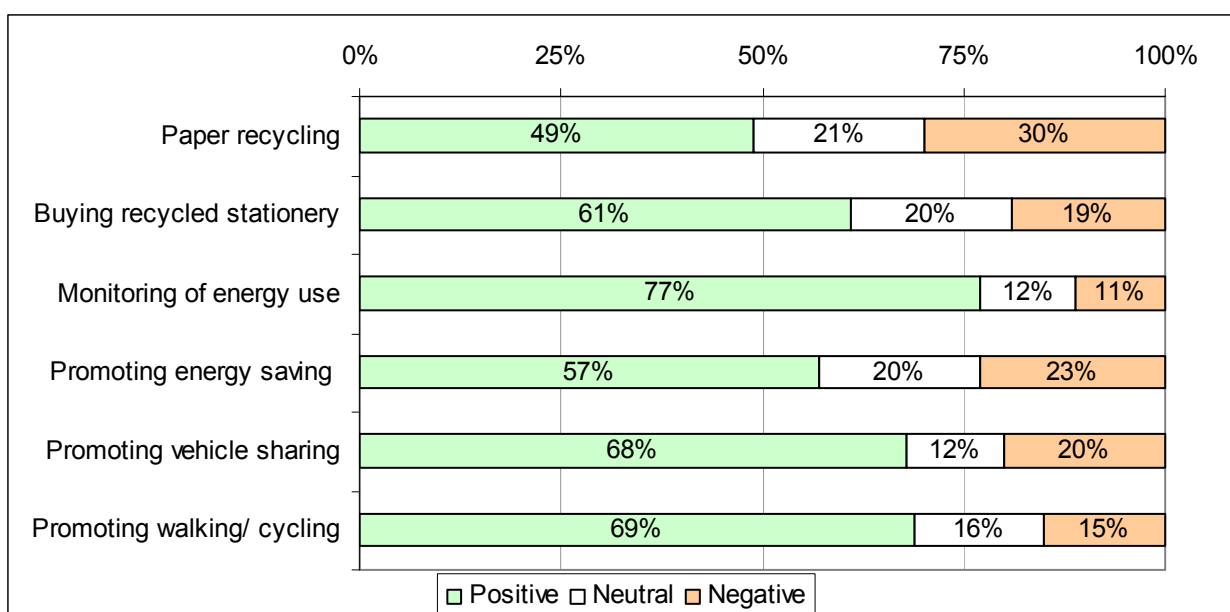
- 5.20. In terms of specific energy saving measures implemented by respondents' employers, paper recycling was the most common - 81% of respondents mentioned this. Promotion of energy saving was also common, and was the only other measure mentioned by more than half of respondents (68%). It is notable that measures related to "greener" transport for employees were the least commonly mentioned, with fewer than 1 in 5 respondents reporting promotion of walking/cycling, promotion of vehicle sharing or use of greener fuels.

**Table 11: Energy saving undertaken by employers**

	N	%
Paper recycling	314	81%
Promoting energy saving (eg switching off lights, monitors, PCs etc)	264	68%
Monitoring of energy use	150	39%
Buying recycled stationery/ materials	104	27%
Promoting walking/ cycling as opposed to private car	69	18%
Promoting/ assisting vehicle sharing amongst employees	61	16%
Converting company vehicles to greener fuels	22	6%
Other	27	7%
Base	387	

- 5.21. More detailed analysis suggests some correlations between the kind of measures implemented by employers, and respondent rating of their employers' energy efficiency (Figure 14).
- 5.22. Respondents who indicated that their employer monitored energy use were the most likely to give their employer a positive overall energy efficiency rating. In particular, more than three quarters of these respondents gave a positive rating (77%), compared to fewer than half of those reporting that their employer recycles paper (49%).

**Figure 14: Rating employer energy efficiency by energy saving measures implemented**



## 6. VISITING THE COUNTRYSIDE

- 6.1. Next respondents were asked about their use of the countryside in the past 12 months, including how often they have visited the countryside (Table 12) and the kinds of activities they took part in (Table 13).
- 6.2. Most respondents indicated that they had visited the countryside at least once a week; nearly two thirds indicated this (65%), including more than a third who visited daily (34%). Indeed, fewer than 1 in 5 visited the countryside less than once a month (19%), and fewer than 1 in 20 had not done so at all in the past 12 months (3%).
- 6.3. This high frequency of countryside visits is unsurprising for a relatively rural local authority area such as Moray where a large proportion of Panel members are likely to live within relatively close proximity of the countryside. The importance of proximity to the countryside in frequency of visits is evident in local area variations in survey responses; respondents in the most rural area (Speyside) were by far the most likely to visit the countryside ever day (more than half indicated this, 56%).

**Table 12: Frequency of visits to the countryside**

	<b>N</b>	<b>%</b>
Daily	263	34%
At least once a week	236	31%
At least once a month	121	16%
Now and again	117	15%
Never/ not at all	20	3%
Don't know/ can't remember	8	1%
Base	765	

- 6.4. In terms of reasons for visiting the countryside, walking or hiking was by some margin the most common specific activity mentioned; more than 4 in 5 of all respondents gave this as a reason for visiting the countryside (85%). Indeed, more than half of respondents indicated that walking or hiking was the single most important reason for their visiting the countryside (53%).
- 6.5. In terms of other reasons for visiting the countryside, sightseeing was the only activity mentioned by more than half of respondents (66%). In addition, a substantial number of respondents mentioned picnics and bird/ animal watching (49% and 42% respectively). Unsurprisingly, more specialised and/or strenuous activities such as skiing, sailing and canoeing were the least commonly mentioned reasons for visiting the countryside.

**Table 13: Reasons for visiting the countryside**

	1st	2nd	3rd	ALL		Rank
Walking/ hiking	53%	18%	11%	626	85%	1
Sightseeing	9%	23%	24%	489	66%	2
Picnics	3%	14%	16%	363	49%	3
Bird/ animal watching	8%	15%	14%	313	42%	4
Cycling	5%	11%	7%	233	31%	5
Events	2%	7%	11%	217	29%	6
Camping/ caravan	4%	4%	6%	146	20%	7
Fishing	3%	3%	3%	109	12%	8
Shooting	1%	1%	2%	89	6%	9
Skiing/ snowboarding	1%	2%	2%	45	6%	10
Sailing	1%	1%	2%	44	6%	11
Canoeing/ kayaking	0%	1%	1%	41	4%	12
Other	11%	2%	2%	30	15%	
Base	714	661	613	741		

- 6.6. A survey of Aberdeenshire Citizens' Panel members in 2005 suggests that Panel members in Moray may be more frequent visitors to the countryside. In particular, Moray Panel members were +9% more likely to visit the countryside daily, and were correspondingly -14% less likely to indicate that they visited the countryside only now and again. However, the survey suggests that reasons for visiting the countryside are very similar across the two areas, with walking/ hiking by some margin the most common reason cited in both surveys.

## 7. NATURAL HERITAGE

- 7.1. The final section of the survey asked the Panel about “natural heritage”, broadly defined as referring to the wildlife, habitats, landscapes and natural beauty of the land and sea but not to any aspects of the built environment.
- 7.2. Panel members were first asked about how they understood the term “natural heritage” (Table 14). A correct definition of the term was not provided, but rather individuals were asked to indicate which from a list of aspects of the Moray environment they felt the term “natural heritage” referred to. This list included a number of aspects of the environment (eg castles/ historic buildings, towns/ cities and arts/ culture) which are not included in “natural heritage”, in order to test Panel members’ comprehension of the term.
- 7.3. Woodland and rivers/ lochs were the most commonly mentioned in relation to “natural heritage” (each by 83% of respondents), with mountains (79%), the coastline (79%) and wildlife (78%) also common. All are key elements of natural heritage, suggesting a relatively good level of understanding of the term “natural heritage”.
- 7.4. However, it is notable that a substantial majority of respondents also thought of castles and historic buildings as part of “natural heritage” (around 2 in 3, 65%). Indeed, respondents were more likely to think of castles/ historic buildings in relation to natural heritage, than to mention country parks (59%) and farmland (45%).
- 7.5. The relatively high proportion of respondents mentioning castles/ historic buildings in relation to “natural heritage” reflects the findings of research conducted on behalf of Scottish Natural Heritage in 2005. This research suggested that the word “heritage” stands out to individuals more than “natural”, and also that the term “National” Heritage can be used by mistake in the context of the organisation Scottish “Natural” Heritage.<sup>5</sup>

**Table 14: Perceived meaning of "Natural Heritage"**

	<b>N</b>	<b>%</b>
Woodland	644	83%
Rivers and lochs	644	83%
Mountains	608	79%
Coastline	607	79%
Wildlife	600	78%
Castles/ historic buildings	503	65%
Country parks	454	59%
Farmland	348	45%
Arts and culture	217	28%
Towns and cities	166	22%
Other	24	3%
Base	773	

<sup>5</sup> George St Research (2005), Promoting key messages about the natural heritage national baseline survey of public attitudes. Scottish Natural Heritage Commissioned Report No.110 (ROAME No. F04AB09). It should be noted that the methodology and format of the survey questionnaire used mean that detailed survey findings are not directly comparable with those of the current Panel survey.

- 7.6. In addition to perceived understanding of the term, Panel members were also asked to identify what they felt were the three most important aspects of natural heritage (Table 15).
- 7.7. Overall, woodland was seen as the most important aspect of natural heritage, mentioned by nearly 7 in 10 respondents (69%). However, coastline and rivers/ lochs were also seen by a substantial majority of respondents as important aspects of natural heritage (66% and 63% respectively). Indeed, respondents were more likely to rank "coastline" as the most important aspect of natural heritage than "woodland".
- 7.8. Mountains were generally seen as a less important aspect of natural heritage, and was ranked in the three most important aspects by fewer than half of respondents (42%). Farmland was least likely to be rated as one of the three most important aspects of natural heritage, mentioned by a little over 1 in 5 respondents (22%).

**Table 15: Importance of aspects of "natural heritage"**

	1st	2nd	3rd	All		Rank
Woodland	23%	33%	21%	535	69%	1
Coastline	36%	16%	19%	510	66%	2
Rivers and lochs	13%	28%	30%	483	62%	3
Mountains	13%	16%	17%	321	42%	4
Farmland	8%	6%	12%	174	23%	5
Other	9%	0%	2%	86	11%	6
Base	770	693	646	773		

## **APPENDIX 1: SURVEY FORM**



## **APPENDIX 2: ADDITIONAL TABLES**

**Table A1: Importance of Environmental Issues**

	<b>N</b>	<b>%</b>
Very important	341	44%
Fairly important	391	50%
Fairly unimportant	34	4%
Very unimportant	8	1%
Don't know/ can't say	8	1%
Base	782	

**Table A2: Concern about environmental issues**

	<b>Very concerned</b>	<b>Fairly concerned</b>	<b>Not concerned at all</b>	<b>Don't know/ can't say</b>
...in the Moray area?	35%	53%	10%	2%
...across Scotland as a whole?	36%	55%	8%	2%
...across the UK as a whole?	37%	52%	8%	3%
...globally?	53%	38%	5%	4%

**Table A3: Importance of key environmental issues**

	<b>Net</b>	<b>Very important</b>	<b>Fairly important</b>	<b>Fairly unimportant</b>	<b>Not at all important</b>	<b>Don't know/ can't say</b>
The impact of transport use on the environment	38%	23%	43%	24%	4%	6%
Climate change/ global warming	48%	20%	51%	20%	3%	6%
Use of natural resources eg coal, oil, gas	54%	25%	50%	18%	2%	5%
Pollution (air, water, noise, light)	61%	32%	47%	16%	2%	3%
Educating people about use of the environment and environmental issues	66%	42%	39%	13%	2%	4%
Minimising waste produced by individuals and businesses	72%	43%	42%	11%	1%	3%
Protecting the local natural environment	76%	46%	41%	9%	2%	3%
Maintaining the quality of towns and villages	80%	46%	42%	8%	1%	3%
Recycling	83%	48%	42%	7%	1%	2%

**Table A4: Awareness of Environmental terms**

	Fully aware of/ know a lot about	Heard of/ know a little about	Heard of/ unsure of what it is	Never heard of
Climate change	66%	32%	1%	0%
Biodiversity	29%	40%	19%	13%
Eco-footprint	32%	41%	19%	8%
Whole life cycle	23%	40%	24%	14%
Natural heritage	40%	45%	12%	3%

**Table A5: Seriousness of Environmental Issues**

	Net	Very serious	Fairly serious	Not very serious	Not at all serious	Don't know/ can't say
Air pollution	-21%	13%	26%	49%	11%	1%
Pollution of water	6%	18%	35%	39%	7%	2%
Noise pollution	-9%	13%	32%	47%	7%	2%
Light pollution	-38%	5%	24%	53%	14%	4%
Disposal of household/ business waste	62%	35%	46%	17%	2%	1%
Recycling	52%	35%	40%	20%	4%	1%
Treatment and disposal of sewage	55%	39%	36%	17%	3%	4%
The impact of fly tipping	67%	47%	35%	14%	1%	3%
The impact of our transport use	28%	20%	42%	28%	7%	3%
Damage to the countryside/ loss of wildlife	43%	35%	35%	25%	3%	2%

**Table A6: How damaging is your lifestyle to the environment?**

	N	%
Very damaging	4	1%
Fairly damaging	135	17%
Neither/ nor	202	26%
Fairly non-damaging	328	42%
Very non-damaging	62	8%
Don't know	44	6%
Base	775	

**Table A7: Impact of recent publicity**

	N	%
Great impact	41	6%
Some impact	352	48%
Little impact	215	29%
No impact	111	15%
Don't know	15	2%
Base	734	

**Table A8: Consideration of environmental issues**

	<b>N</b>	<b>%</b>
Always consider	101	13%
Usually consider	319	41%
Occasionally consider	278	36%
Never consider	83	11%
Base	781	

**Table A9: Importance of factors in buying decision**

	<b>Average Score</b>	<b>Banded Score</b>					
		<b>1-3</b>		<b>4-7</b>		<b>8-10</b>	
Quality of product	<b>9</b>	7	1%	85	11%	684	88%
Cost/ value for money	<b>9</b>	8	1%	111	14%	658	85%
Less packaging/ recyclable packaging	<b>8</b>	39	5%	218	28%	518	67%
Energy efficiency rating	<b>8</b>	33	4%	234	31%	494	65%
Locally produced goods	<b>8</b>	38	5%	275	35%	464	60%
Labelling (eg ingredients/ nutrition)	<b>7</b>	86	11%	281	36%	405	52%
Fair trade	<b>7</b>	60	8%	377	49%	334	43%
Produced from sustainable sources	<b>7</b>	77	10%	372	50%	302	40%
Brand	<b>5</b>	198	26%	385	50%	184	24%
Organic	<b>5</b>	223	30%	361	48%	168	22%
Product advertising/ appearance	<b>4</b>	332	44%	377	49%	54	7%

**Table A10: Perceived role in tackling environmental issues**

	<b>Leading role</b>	<b>Significant role</b>	<b>Minor role</b>	<b>No role at all</b>	<b>Don't know</b>
The Police	9%	24%	45%	16%	6%
Voluntary groups/ organisations	10%	40%	41%	4%	6%
You	19%	39%	38%	2%	1%
Scottish Natural Heritage	22%	42%	24%	4%	8%
Scottish Water	34%	46%	14%	2%	4%
The Council	39%	50%	9%	1%	1%
Industry	42%	40%	11%	3%	4%
Scottish Environmental Protection Agency	46%	40%	8%	2%	5%
Scottish Executive	51%	35%	10%	1%	3%
UK Government	56%	28%	13%	2%	2%

**Table A11: Awareness of energy audit**

	<b>N</b>	<b>%</b>
Fully aware, have had energy audit on my property	69	9%
Fully aware, but not had energy audit carried out on my property	188	24%
Heard of, know a little about	185	24%
Heard of, but unsure of what an audit involves	103	13%
Never heard of	239	31%
Base	784	

**Table A12: Barriers to installing energy saving measures**

	<b>Very important</b>	<b>Fairly important</b>	<b>Fairly unimportant</b>	<b>Not at all important</b>	<b>Don't know/ can't say</b>
Unaware of measures available	37%	38%	9%	8%	8%
Unaware of any grants/ assistance installing measures	44%	35%	9%	5%	6%
Cost of installing measures	65%	26%	3%	1%	4%
No grants available/ not eligible for assistance	41%	30%	11%	5%	13%
Not concerned about environmental issues	17%	24%	16%	31%	13%
Other	46%	8%	1%	3%	42%

**Table A13: Energy efficiency of employer**

	<b>N</b>	<b>%</b>
Excellent	19	4%
Quite good	149	32%
Neither/ nor	95	20%
Quite poor	95	20%
Very poor	62	13%
Don't know/ not in employment	48	10%
Base	468	