Greater Manchester Residents' Survey

Survey 14 (main report)

September 2024

Fieldwork conducted 19th August – 2nd September

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(further information on methodology, sample, key demographics and significance testing / statistical difference)

Introduction and methodology

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Background

- This report presents summary findings for a quantitative **survey carried out between 19th August and 2nd September 2024, with a representative sample of 1,482 residents** from across all ten Greater Manchester local authority areas.
- The report is divided into themed sections, providing an overview into **respondents' feelings and behaviours around personal health and wellbeing, satisfaction with the local area, cost of living and digital access**.
- Data from August 2024 (survey 14) is presented alongside that from similar Greater Manchester resident surveys undertaken in July 2024 (survey 13) and May (survey 12). The following approaches have been used, identified as most appropriate for the datasets in each theme:
  - health and wellbeing – data from individual surveys is shown separately
  - local area – data from individual surveys is shown separately, except when commenting on trends for specific sub-groups or districts
  - cost of living – data from individual surveys is shown separately
  - digital inclusion – merged data for surveys 12, 13 and 14 is used, drawing on face-to-face responses only
- To provide a national comparison, where available, **Greater Manchester findings are presented alongside the most recent benchmarking data from relevant national surveys** – for example, published figures from the Office for National Statistics (ONS) and the Department for Culture Media and Sport (DCMS).
- These surveys are intended to provide regular ongoing insights for Greater Manchester organisations and partners to help inform how and where to target support, communications / engagement activities and resources to improve the lives of Greater Manchester residents.

Methodology

- Between February 2022 and September 2024, BMG Research has undertaken fourteen surveys, each comprising circa 1,500 residents from across Greater Manchester.
- In surveys 1 to 11 the sample was comprised of approximately 750 online panel respondents, 250 telephone respondents, and 500 online ‘river sampled’ respondents (those who responded to adverts, offers and invitations to take part in the surveys).
- **From survey 12 (May 2024) onwards the methodology was revised**, to now include around:
    - 750 online panel respondents
    - 500 online rapid respondents (see Appendix for more details), and
    - 250 face-to-face respondents
- This mix of online and face-to-face surveying was agreed so that the most representative and robust sample of Greater Manchester residents can be regularly sourced within available time and budget. **One of the main reasons the face-to-face element is included is so that those without internet access can take part in the survey. It has replaced the previous telephone approach because analysis suggests those who are truly digitally excluded are less likely to be able to take part by phone.***
- This new methodology will remain consistent for the duration of 2024/25. With three waves of face-to-face methodology, it is apparent that the change in methodology has not had a negligible impact on results. See Appendix for more details.
- Each survey is designed to take **15 minutes** on average for respondents to complete; however, due to the emotive nature of some topics covered, face-to-face interviews tend to take longer than this.
- **Quotas** are set to ensure the sample broadly reflects the profile of Greater Manchester’s population by gender, age, ethnicity and disability, with further consideration of wider protected and key characteristics.
- **Weights** have been applied to the data gathered to ensure the sample matches the population profile by age, gender, ethnicity, disability and locality, and to ensure consistency between individual surveys.

*When reviewing digital inclusion findings in this report, readers should be aware that some modal impacts do exist between telephone and face-to-face approaches because of the way participants are recruited. See relevant section of this report for more details on the rationale for changes in methodology for 2024/25 waves of the survey.

Report contents and guidance

Identifying significant differences / change

- Where relevant, **differences in findings for specific demographic and other population characteristics compared to the Greater Manchester average** are reported. These differences are only highlighted where they are significantly different statistically (at the 95% level of confidence) compared with the 'total' figures (i.e. the Greater Manchester average). Significant differences are shown in charts and tables with the use of up ⬆ and down ⬇ arrows. Further detail on significance testing can be found in the Appendix of this report.

Sample sizes

- On some questions, **responses have been filtered only to include respondents to whom the question is relevant** (e.g. those in work, or with children), and so bases are lower than the full sample of 1,482 respondents in some instances. Where this is the case, this has been noted in the footnotes of each slide, along with the unweighted base sizes.

Language - inequalities

- It should be noted that **this report uses the term 'from within racially minoritised communities' to refer to people and communities experiencing racial inequality** (the term recognises that individuals have been minoritised through social processes rather than just existing as distinct minorities, although it is important to acknowledge the negative consequence of grouping all minoritised individuals together under one term, as there are significant differences both between and within these groups. 'From within' has been added to recognise that not all in these communities will identify as minoritised). Due to limitations of sample size, we are generally unable to report findings from individual surveys for specific ethnic groups. However, where data is merged from multiple surveys over several months, the larger overall sample size allows us to look at smaller demographic groups in more detail. Any such differences are included throughout this report.

Health and wellbeing

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Health and wellbeing – context

The Greater Manchester Residents' Survey investigates the four measures of personal wellbeing commonly asked in national surveys:

- life satisfaction
- anxiety
- happiness, and
- feelings that things done in life are worthwhile.

Up until April 2023 (survey 6), due to survey time constraints, questions were asked only on the first two of these measures; subsequent changes across the survey have allowed capacity for exploring wellbeing in these broader terms. As this is now the eighth time that we have asked all four questions, findings in relation to wellbeing are becoming more robust at different spatial levels and for different sub-groups.

The wellbeing questions used are replicated from the Annual Population Survey. These are nationally recognised metrics, used in their current form since 2011.

We also ask questions around people’s abilities to manage their own health. This allows us to calculate – and track changes over time in – an overall Health Confidence Score for Greater Manchester. Questions are modelled on a published BMJ approach.

For the third time, this survey now also includes additional measures of wellbeing, around hope for the future and fairness of treatment by society. These questions mirror those from ONS’ UK Measures of National Well-being, allowing for comparison of Greater Manchester and national results.

Health and wellbeing– key findings (1 of 2)

WELLBEING

- In the short term, since July 2024, wellbeing measures show improvement when compared with the past 18 months:
    - There has been no significant change in life satisfaction since July (64% reporting ‘very high’ or ‘high’ satisfaction, compared to 61% in July). Looking at this data historically demonstrates a recent trend towards higher life satisfaction, without movement towards the extremes of the scales
    - Anxiety has remained stable, with almost 2 in 5 reporting ‘high’ levels of anxiety (38% cf. 37% in July). Historically, there has been very little movement at any level of anxiety
    - People feeling that the things they do in their life are worthwhile has also remained stable, with no significant variation since July. A quarter (23%) report ‘very high’ levels of feeling the things they do in life are worthwhile
    - A fifth (22%) report ‘very high’ levels of happiness, similar to previous waves
- Disabled respondents and those renting their homes continue to be flagged in the demographic analysis as priority sub-groups

HOPE AND FAIRNESS (merged July – August data)

- 3 in 4 Greater Manchester respondents (77%) report feeling hopeful about their future – this is higher than the GB equivalent, though not significantly so. 1 in 10 (12%) are unhopeful about their future
- Higher proportions of GM and GB respondents say they are treated unfairly by society (17% in Greater Manchester, 13% in Great Britain). This builds on the GM picture initially seen in July fieldwork (when 16% said felt they were treated unfairly). At the positive end of the scale, however, 62% say they are treated fairly in Greater Manchester – this compares somewhat favourably to 59% in Great Britain

VACCINATIONS

- For the first time, the survey collected a combined suite of data on COVID-19, flu and Respiratory Syncytial Virus (RSV) vaccines:
    - 9 in 10 respondents are aware of vaccines for Covid (95%) and the flu (91%), however awareness of the RSV vaccine is much lower, at 23%. This gap can also be seen when comparing eligibility, with 7 in 10 knowing whether they are eligible or not for COVID-19 (73%) and flu (71%) vaccines, but only 12% knowing whether they are eligible for the RSV vaccine. Generally, therefore, there are high levels of uncertainty about the RSV vaccine
    - When looking at potential uptake of vaccines among just the population that think they are eligible for each - and therefore thinks they are at risk of contracting the illness – the flu and RSV vaccines are, however, slightly more trusted among its eligible groups than Covid. Only 69% of those who think they are eligible for the Covid vaccine would get it, whereas 79% would get the flu vaccine and 72% the RSV jab

Health and wellbeing– key findings (2 of 2)

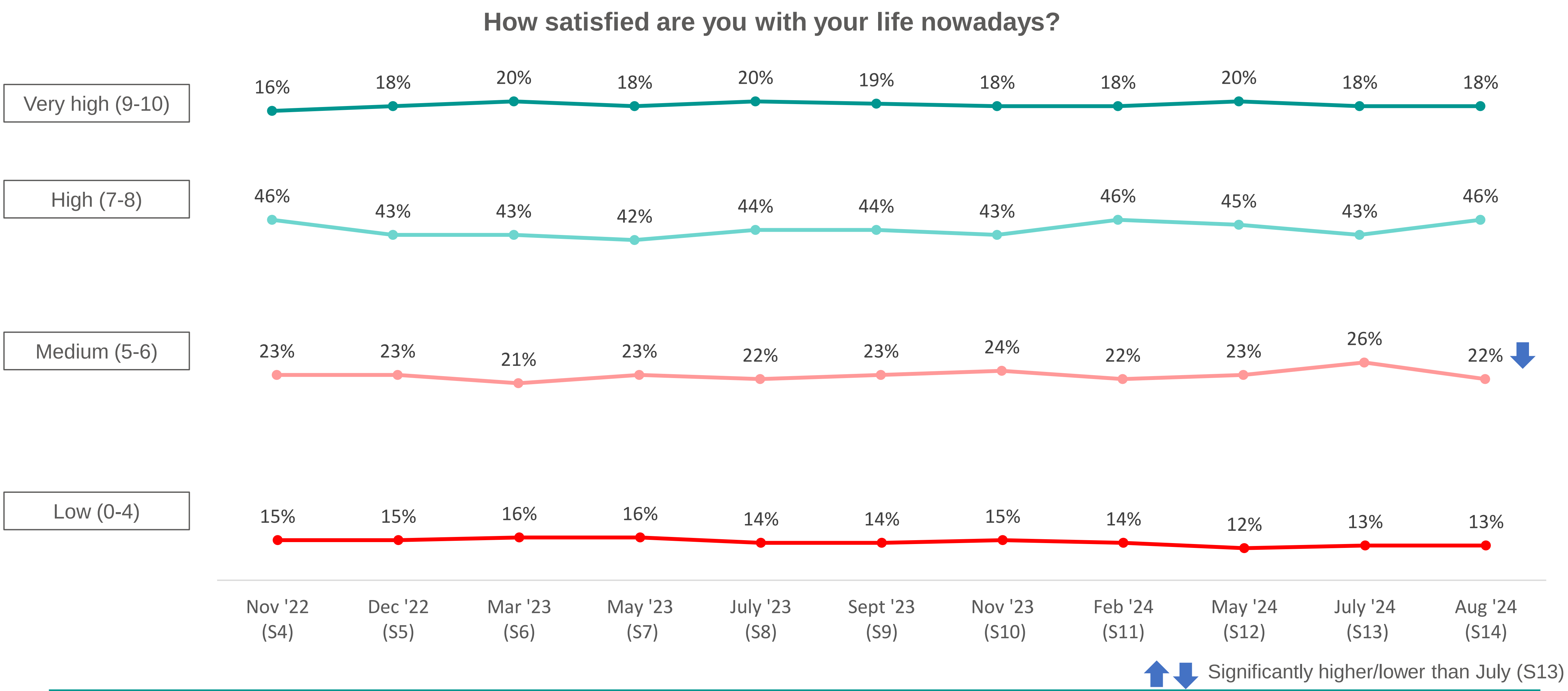
HEALTH CONFIDENCE

- August's results show no significant change in the Health Confidence Score for Greater Manchester since July (71.4 in August, was 71.6 in July). The score is 1.4 points higher than its lowest level of 70.0 back in November 2023
  - This score of 71.4 represents a 'moderate' level of health confidence among Greater Manchester respondents
- While the overall health confidence results remain stable, some of the individual scores have moved when compared with July:
  - getting the right help if they need it has declined (66.1, reduced by 1.2 points since July) – though this is the first decrease in this metric since last November. One in eight respondents said elsewhere in the survey that there have been occasions in the last month when they have been unable access NHS health and / or social care services due to cost implications (such as cost of time away from work, travelling time, public transport costs, cost of parking, or childcare costs)
  - being able to look after their own health has also declined (70.6, reduced by 0.6 points)
  - feeling involved in decisions about themselves remains stable (81.2, compared to 81.4 in July)
  - residents knowing enough about their own health has improved (67.7, an increase of 1.2 points since July, when an unusually low level of confidence was recorded)

HEALTH CONFIDENCE – DISABLED RESPONDENTS

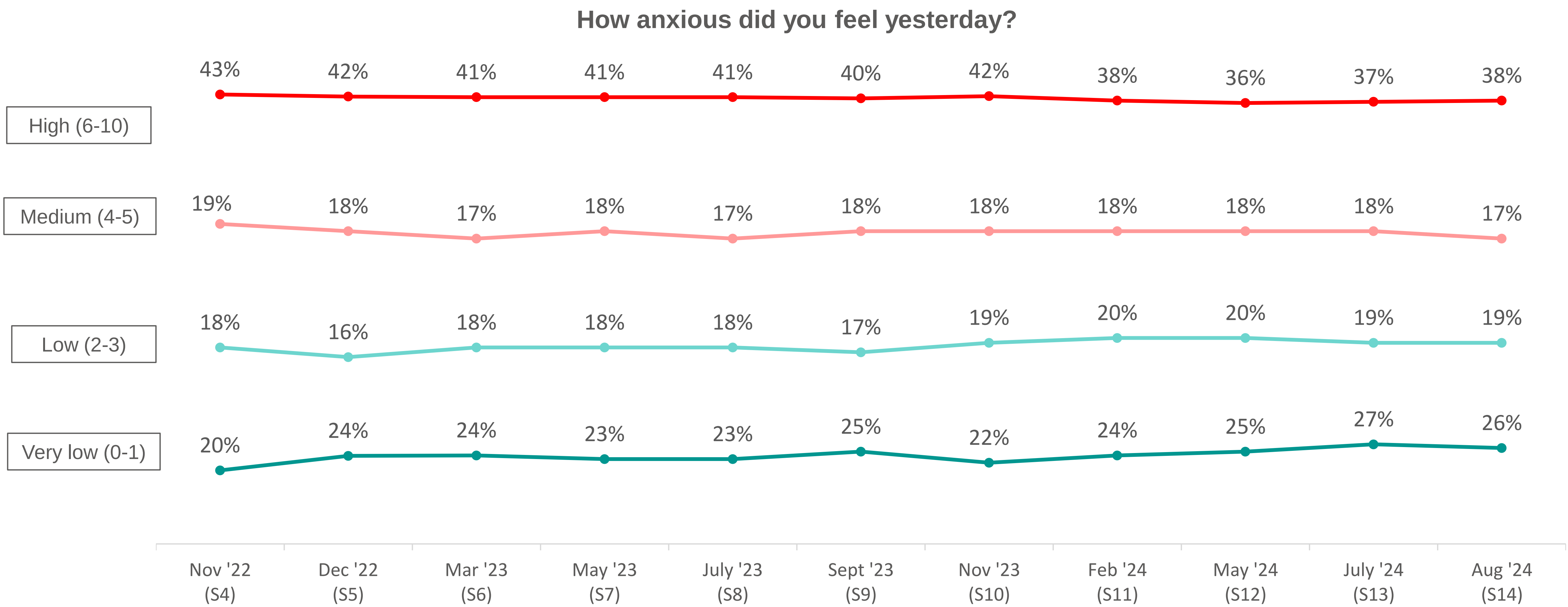
- Disabled respondents remain significantly more likely to respond negatively than the general population, reporting a health confidence score of 60.8 (compared to 71.4 for all respondents). Despite this difference, this HCS is still rated as 'moderate' (scores between 60 and 79)
  - This is the second lowest score recorded among disabled respondents since tracking began in May 2023 (with a score of 60.5). Whilst all dimensions have fallen since July, the biggest drop has been in relation to respondents knowing enough about their health, which has seen a drop of -5.2 since July
  - With this fall in their HCS, the gap in the overall health confidence score between disabled and all respondents has increased since July (10.6 points difference, was 7.6 points difference in July). This gap is driven primarily by differences in feeling able to look after their own health (13.3 points difference – 57.3 for disabled respondents compared to 70.6 points overall); this means that disabled respondents' health confidence is rated 'low' in this area – however, August fieldwork has noted a larger gap among all dimensions of health between disabled and all respondents

Overall life satisfaction has remained broadly stable since July, and indeed there is broad stability in this measure over the long term. The data suggests a slight recent trend towards higher satisfaction, but without any movement amongst those reporting at the extremes of the scale



A1. Where 0 is "not at all" and 10 is "completely"…
Unweighted base: Greater Manchester Residents Survey 4: 1636; Survey 5: 1470; Survey 6: 1767, Survey 7: 1488, Survey 8: 1612, Survey 9: 1560, Survey 10: 1546, Survey 11: 1460, Survey 12: 1551, Survey 13: 1540, Survey 14: 1482

Anxiety levels continues to remain stable in August – with almost 2 in 5 (38%) reporting high levels of anxiety and 1 in 4 (26%) reporting very low levels



A2. Where 0 is "not at all" and 10 is "completely"…
Unweighted base: Greater Manchester Residents Survey 4, 1636; Survey 5: 1470, Survey 6: 1767, Survey 7: 1488, Survey 8: 1612, Survey 9: 1560, Survey 10: 1546, Survey 11: 1460, Survey 12: 1551, Survey 13: 1540, S14: 1482

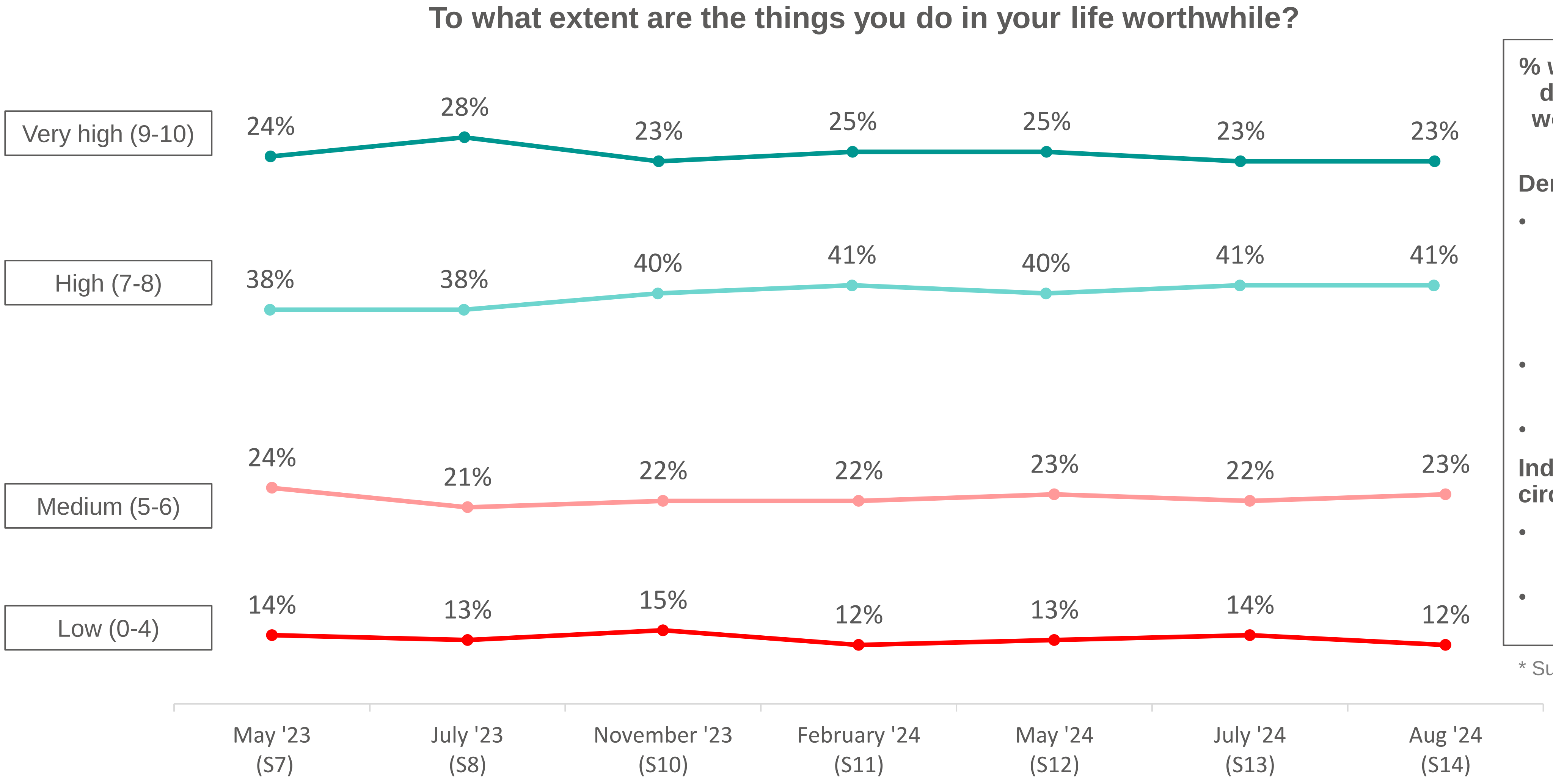
As with the other measures, those more likely to have low levels of life satisfaction and high levels of anxiety include those with long term health conditions and renters

% with higher levels of 'low' life satisfaction compared to GM average (13%)*:	% who felt 'highly anxious' compared to GM average (37%) is higher among*:
Demographics: • Those with a disability (26%), including those with mental ill health (38%), a learning disability (26%), a mobility disability (24%), or other disability (24%) **Individual and/or family circumstance:** • Those with very low levels of hopefulness (72%), low feelings that life is worthwhile (57%), or low levels of happiness (54%) • Those who do not feel they can look after their own health (48%) or know enough about their own health (48%) • Those who find it difficult to manage their health (43%) • Those not in work due to ill health or disability (42%), or have been out of work for 6 months or less (31%) • Those dissatisfied with their local area (32%) • Those seeking help with their debt (31%) • Those who have been treated unfairly by society (30%) • Those who feel lonely at least some of the time (30%) • Those who would not recommend their local area (26%) • Those who are financially vulnerable (25%) • Those who are renting (19%)	**Demographics:** • Chinese respondents (54%) • Those who are bisexual (51%) • Those with a disability (51%) including those with mental ill health (68%), a learning disability (69%), a sensory disability (56%) **Individual and/or family circumstance:** • Those finding it difficult to manage their level of debt (68%) • Those with very low levels of hopefulness (67%), low levels of happiness (66%), low levels of life satisfaction (63%), or feel lonely at least some of the time (61%) • Those seeking help with their debt (67%) • Those who do not feel they can look after their own health (63%) or know enough about their own health (63%) • Those not in work due to ill health or disability (59%) • Those who have had to borrow money or use more credit in the last month (52%) • Those who feel they are treated unfairly by society (51%) • Those who find it difficult to afford their mortgage (50%) • Those earning below the Real Living Wage (49%)

* Subgroup analysis uses merged data from S12, 13 and 14 combined

A1. Where 0 is "not at all" and 10 is "completely"… A2. Where 0 is "not at all" and 10 is "completely"… Unweighted base: Greater Manchester Residents Surveys 12-14, 4573

Around 2 in 3 respondents continue to feel very highly or highly that the **things they do in life are worthwhile.** However, disabled respondents and those who rent their homes continue to be less likely to feel that this is the case



% who felt that the things they do in their life are not at all worthwhile compared to GM average (13%)*:

Demographics:

- Those who have a disability (23%), including mental ill health (34%), a learning disability (24%) or sensory / mobility disabilities (20%)
- Those who are not heterosexual (17%)
- Those aged 16-24 (17%)

Individual and/or family circumstance:

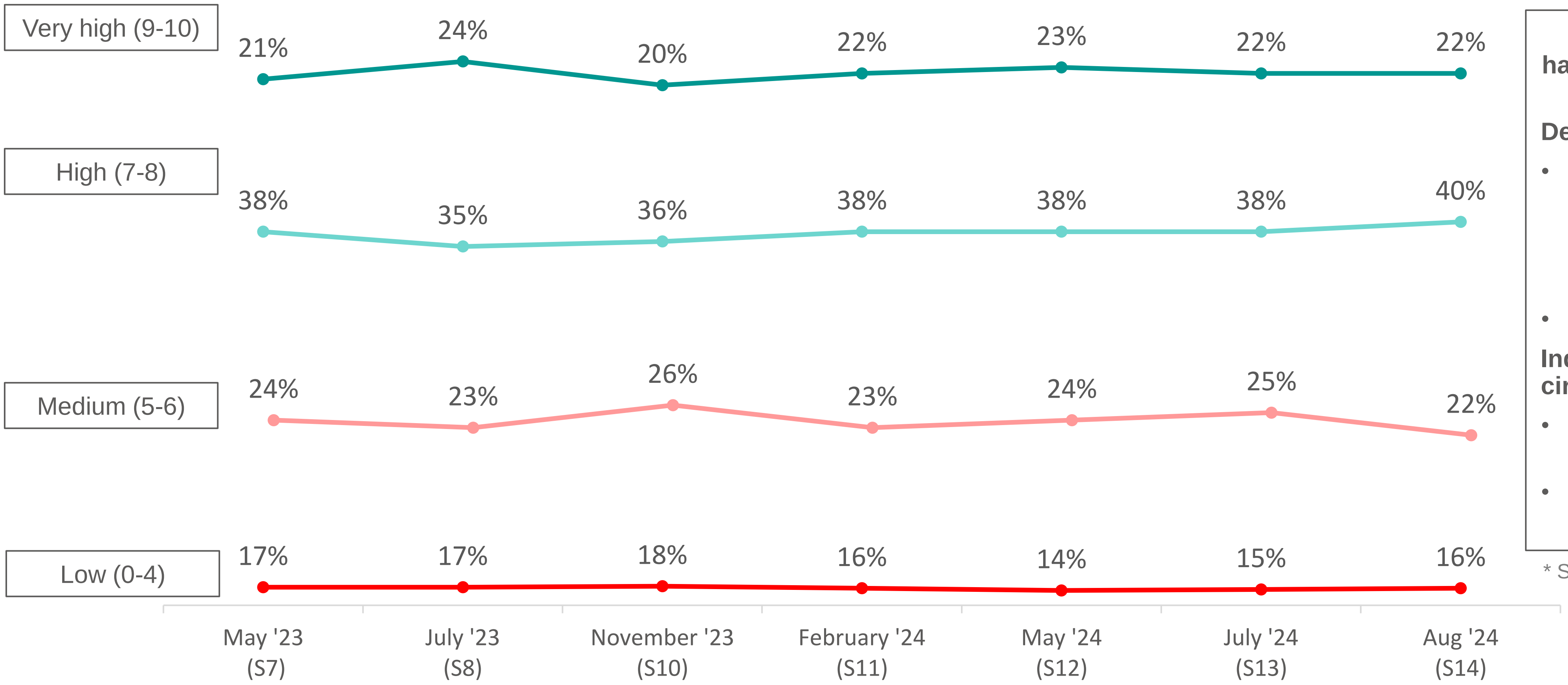
- Those who rent their home (18%)
- Those living in single person households (16%)

* Subgroup analysis uses merged data from S12-14

Q10. Overall, to what extent do you feel that the things you do in your life are worthwhile, on a scale of 0 to 10, where 0 is “not at all” and 10 is “completely”? / Unweighted base: (All respondents) S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482. Thresholds are applied to responses to convert the 11-point scale into the categories shown. Unweighted base: S12-14 = 4573 (All respondents).

3 in 5 said they feel very high or high levels of happiness – in line with previous waves. As with other metrics, those less likely to feel happy include those with a disability and those who rent their home

How happy did you feel yesterday?



% who did not feel at all happy yesterday, compared to the GM average (15%)*:

Demographics:

- Those who have a disability (29%), including those with mental ill health (42%), a learning disability (29%) or other disability (2827
- Those aged 16-24 (19%)

Individual and/or family circumstance:

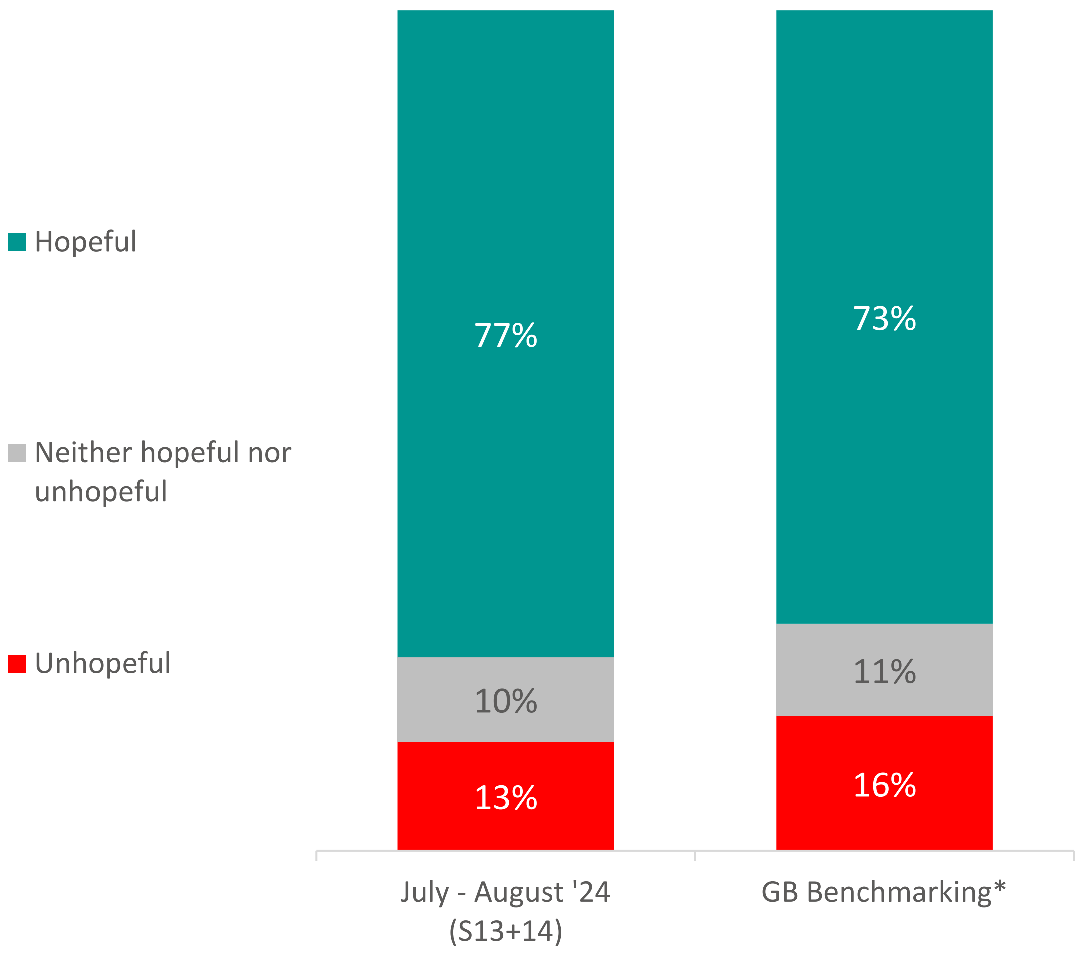
- Those not in work due to ill health or disability (41%)
- Those who are renting (22%)

* Subgroup analysis uses merged data from S12-14

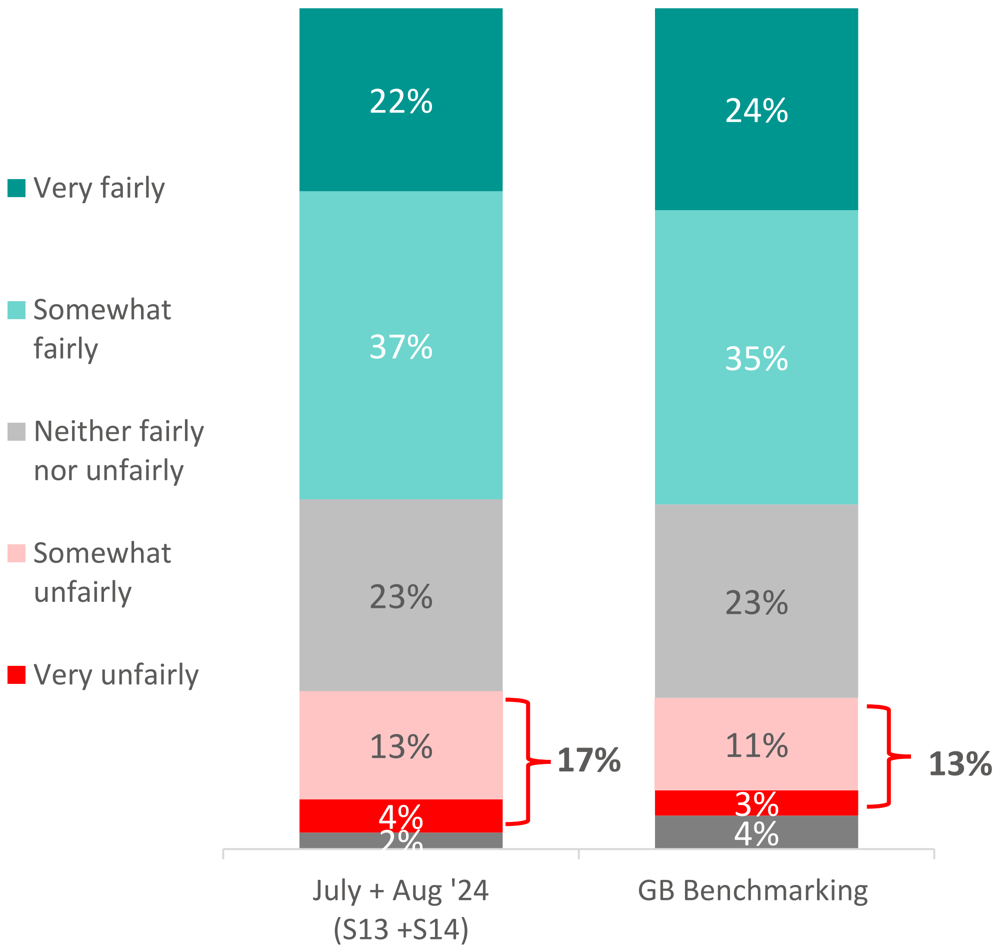
Q11. Overall, how happy did you feel yesterday, on a scale of 0 to 10, where 0 is "not at all" and 10 is "completely"? S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482. Thresholds are applied to responses to convert the 11-point scale into the categories shown.
Unweighted base: Greater Manchester Residents Survey 12-14: 4573 (All respondents)

Over the summer, 77% of GM respondents reported high levels of hopefulness about their future, higher than the most recent GB average of 73%. Meanwhile, 17% feel they are treated unfairly by society – slightly higher than 13% across GB

How hopeful do you feel about your future?



How fairly or unfairly do you feel you are treated by society?



A3. Overall, how hopeful do you feel about your future, where 0 is 'not at all hopeful' and 10 is 'completely hopeful'? A4. How fairly or unfairly do you feel you are treated by society?
Base: Surveys 13+14, 3018. GB benchmarking taken from UK measures of wellbeing (fieldwork period 8 to 19 May 2024) *Figure 70% in national figures, rebased for reporting purposes here

Those more likely to feel unhopeful, or feel they are treated unfairly by society include those with a disability and those who report difficulties managing their own health. Those struggling with debt or financially vulnerable more generally are prominent, along with those reporting dissatisfaction with their local area

% with higher levels of 'low' hopefulness compared to GM average (13%)*:

New subgroups found in analysis:

- Those not in work due to ill health or disability (36%)
- Those struggling to manage their level of debt (34%)
- Those dissatisfied with their local area (29%)
- Those who are seeking help with their debt (28%)
- Those who feel lonely at least some of the time (27%)
- Those who are financially vulnerable (26%)
- Those who disagree that people from different backgrounds get on well together in their local area (25%)
- Those renting from local authorities or councils (22%)

Subgroups that continue to feature significantly:

- Those with low levels of life satisfaction (59%) and low feelings that life is worthwhile (59%)
- Those who disagree they are able to look after their own health (53%)
- Those with a disability (28%) including mental ill health (41%), or a mobility disability (29%), or a learning disability (26%)
- Those who feel they are treated unfairly by society (33%)
- Renters (18%), including those who rent from housing associations or trusts (23%)

% who felt society treats them 'unfairly' compared to GM average (17%) is higher among*:

New subgroups found in analysis:

- Those who are dissatisfied with their local area (37%)
- Those who struggle to manage their level of debt (35%)
- Those who do not recommend their local area (34%)
- Those seeking help with their debt (33%)
- Those who disagree that people in their local area look out for each other (29%)
- Those who are financially vulnerable (29%)

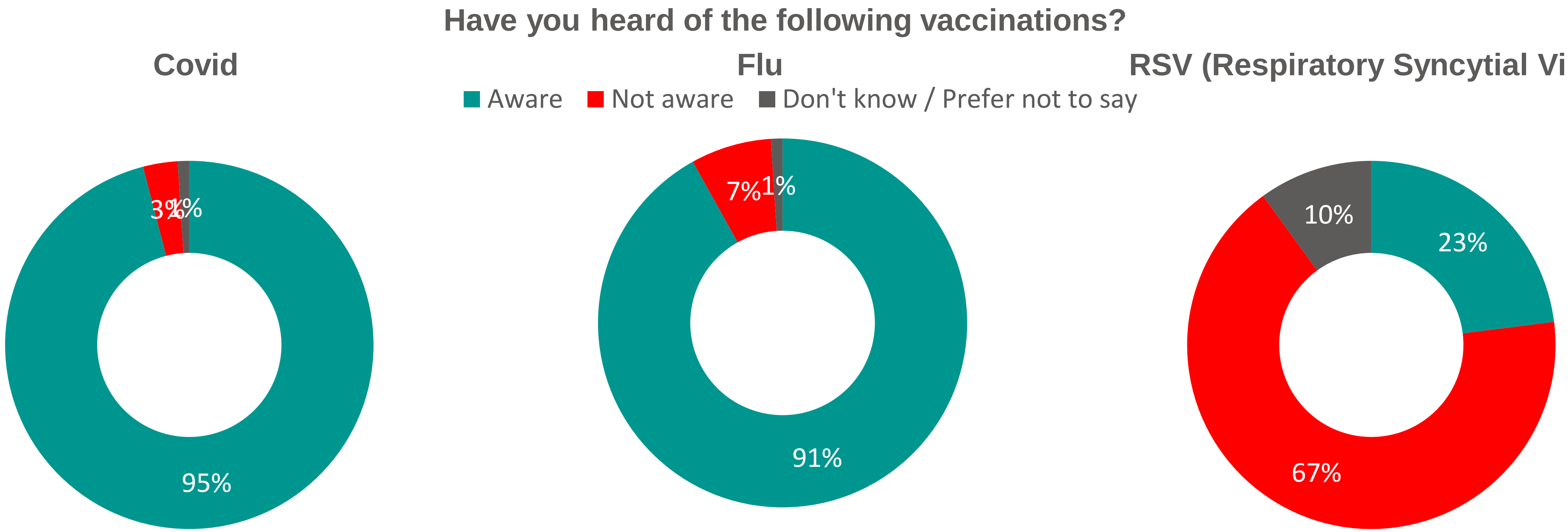
Subgroups that continue to feature significantly:

- Those who do not feel able to look after their own health (48%)
- Those who do not know enough about their own health (48%)
- Those with very low levels of hopefulness (39%), and low levels of life satisfaction (38%)
- Those with a disability (28%), including those with mental ill health (35%), or a mobility disability (28%), or sensory disability (28%)
- Those with low levels of happiness (36%)
- Those not in work due to ill health or disability (30%)
- Renters (21%), including those who rent from housing associations or trusts (23%), or local authorities or councils (24%)

* Subgroup analysis uses merged data from S13 and 14 combined

A3. Overall, how hopeful do you feel about your future, where 0 is 'not at all hopeful' and 10 is 'completely hopeful'? A4. How fairly or unfairly do you feel you are treated by society?
Unweighted base: Greater Manchester Residents Surveys 13-14, 2018

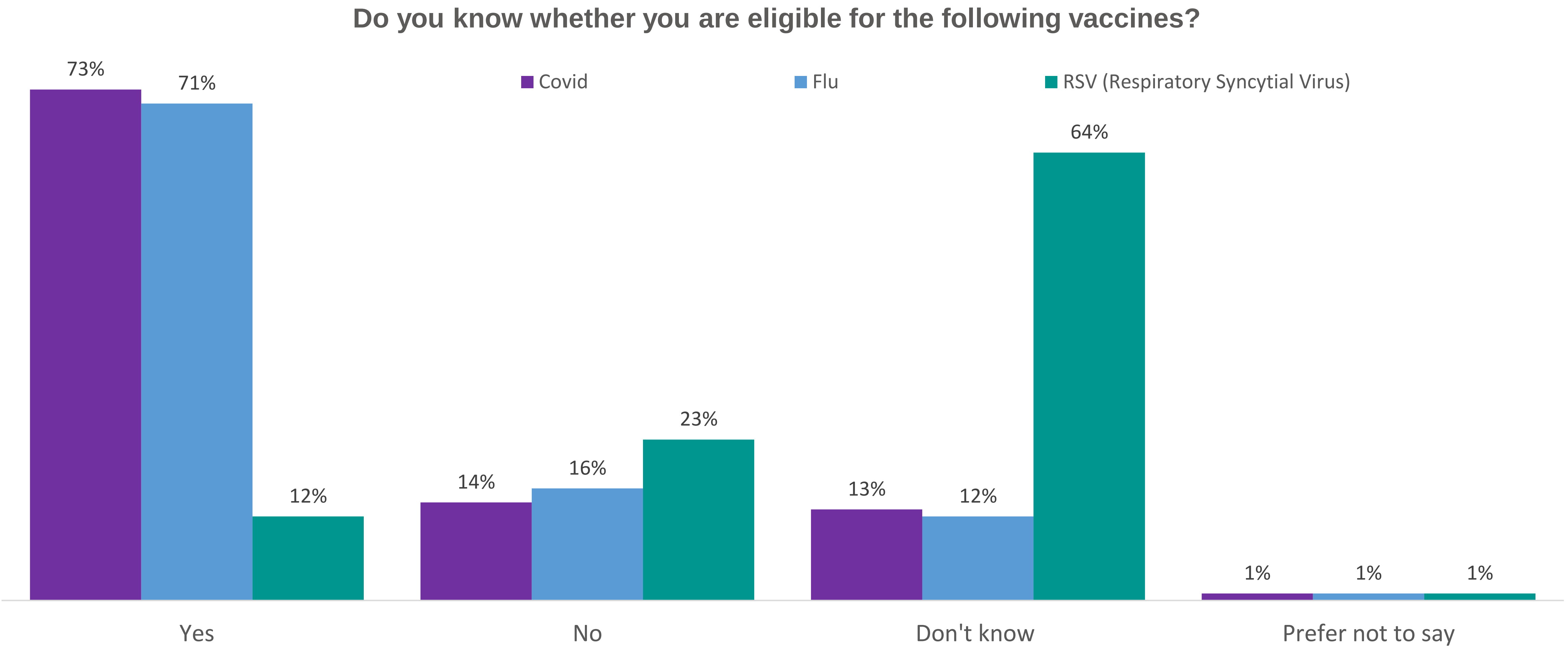
For the first time, respondents were asked about their relative awareness of three vaccines: Covid 19, Flu, and the Respiratory Syncytial Virus (RSV) vaccine. While nearly all (95% and 91%) respondents have heard of the Covid and Flu vaccines, less than a quarter (23%) are aware of the RSV vaccine



- Individuals of all ages can get an RSV infection, but some groups are at higher risk of serious complications from RSV. A national vaccination campaign commenced on 1st September 2024 in England, which includes a vaccine for pregnant women over 28 weeks to help protect their newborn babies, a routine programme for those over 75 and a one-off campaign for people aged 75 to 79. Females under 44 with children under 5 are significantly more likely to be aware of the RSV vaccine (47%).
- We cannot directly identify respondents who are caring for elderly relatives in the target cohort, but we are able to examine the responses of those with caring roles or experience more generally. Awareness amongst survey respondents (of any age) who have caring responsibilities is 26%, with awareness amongst those with previous caring responsibilities at 32%. The latter group has a significantly higher awareness compared to the average respondent.
- We cannot directly identify pregnant respondents (and in any case the sample would be too small), but we can identify younger female respondents. Awareness amongst female respondents aged between 25 and 44 is 34%, significantly higher than average

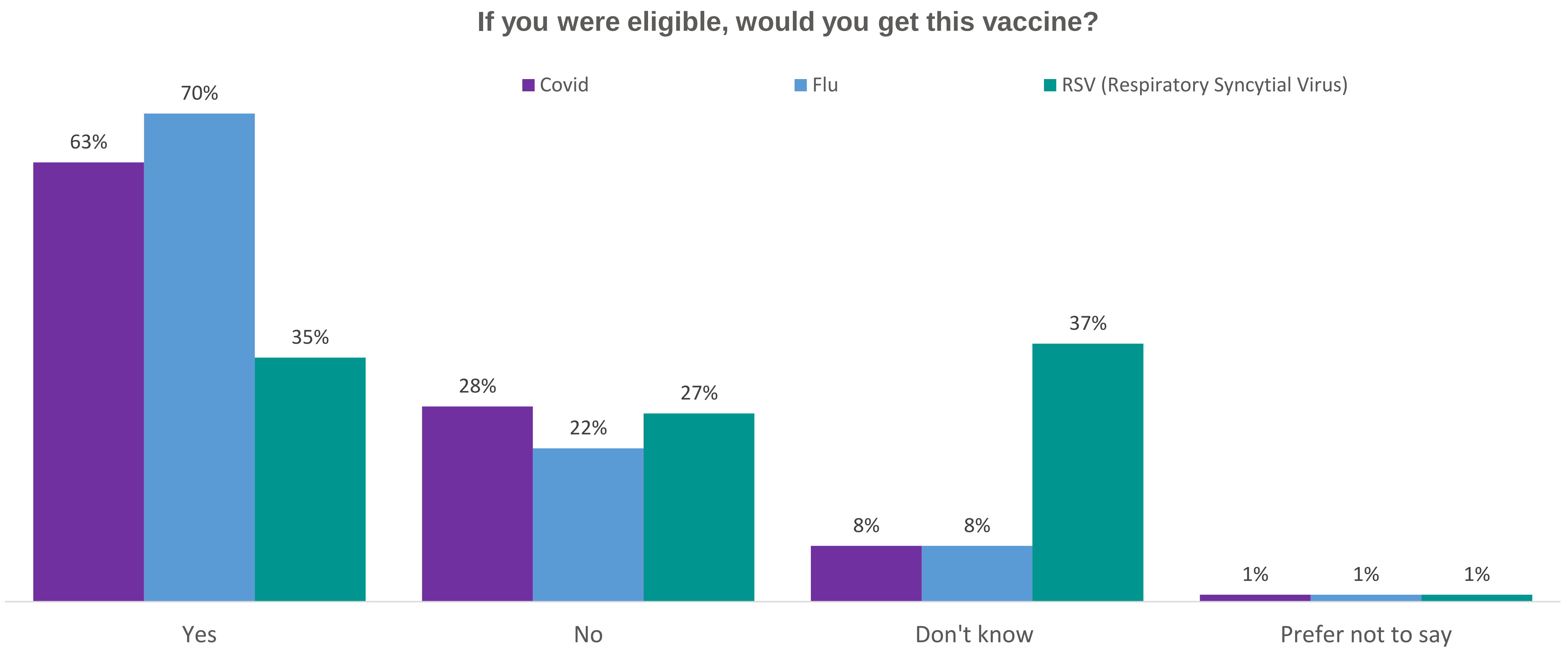
V1. Have you heard of the following vaccinations?
Base: Survey 14, 1482.

Awareness of eligibility varies by vaccine, with 7 in 10 knowing if they are eligible for the Covid (73%) or Flu (71%) vaccine, but only 1 in 10 (12%) saying they know if they are eligible for the Respiratory Syncytial Virus vaccine



V2. Do you know whether you are eligible for the following vaccines? Base: Survey 14, 1482.

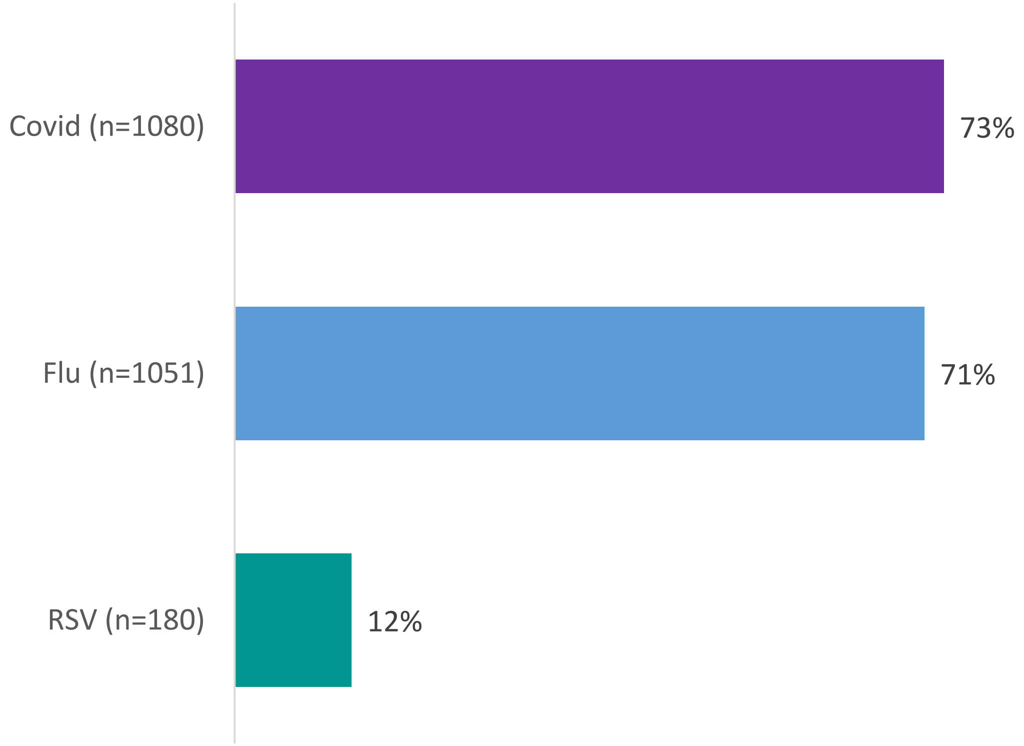
There are high levels of uncertainty about the Respiratory Syncytial Virus vaccine. 63% saying they would get the Covid vaccine if they were eligible, while 70% would get the flu vaccine. In contrast, only 35% would get the RSV vaccine if eligible (with 27% saying they would not, and 37% saying they don’t know)



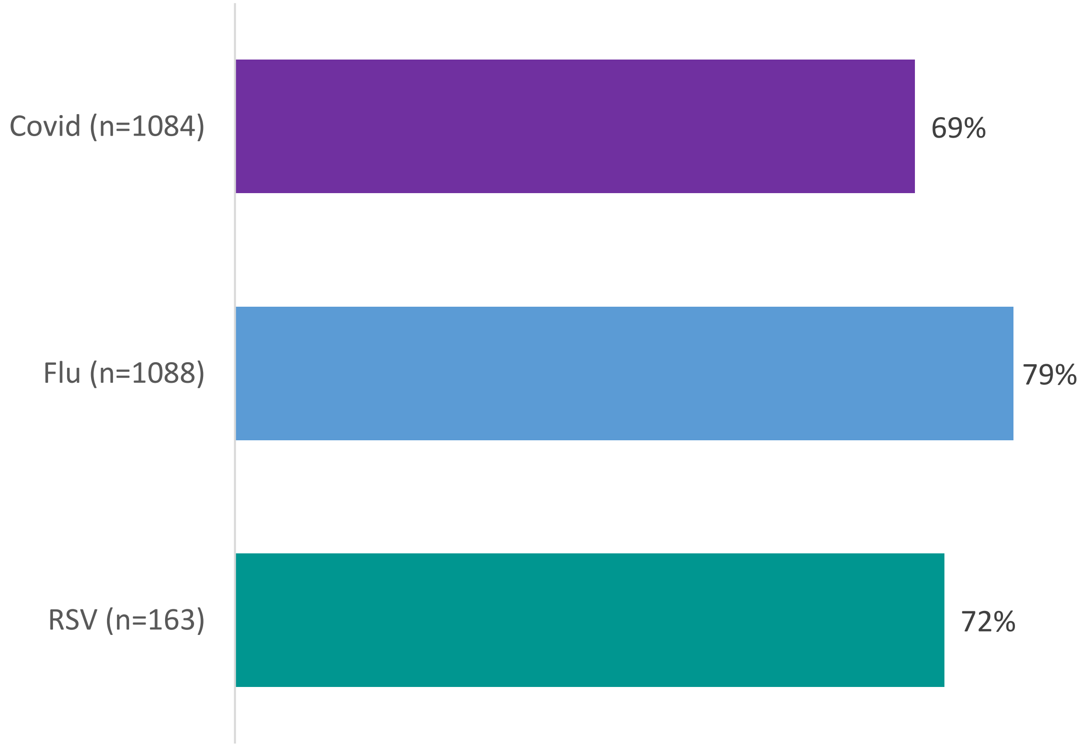
V3. If you are eligible, would you take up the offer of the following vaccines?
Base: Survey 14, 1482.

When looking at potential uptake of vaccines among the population that think they are eligible for each - and therefore thinks they are at risk of contracting the illness – the flu and RSV vaccines are more trusted among its eligible groups than Covid. Only 69% of those who think they are eligible for the Covid vaccine would get it, whereas 79% would get the flu vaccine and 72% the RSV jab

Knowledge of eligibility for vaccines



Uptake of vaccines among those eligible



V2. Do you know whether you are eligible for the following vaccines? V3. If you are eligible, would you take up the offer of the following vaccines?
Unweighted bases in parentheses.

The **overall Health Confidence Score (HCS)** in the August 2024 fieldwork is 71.4 out of 100, which remains stable with the July 2024 figure of 71.6.

An overall health confidence score is calculated based on responses to four questions, each covering one of four dimensions – access, knowledge, self-management, shared decisions

Access	Knowledge	Self-management	Shared decision
66.1	**67.7**	**70.6**	**81.2**
-1.2 (since July)	+1.2 (since July)	-0.6 (since July)	-0.2 (since July)
'I can get the right help if I need it'	'I know enough about my health'	'I can look after my health'	'I am involved in decisions about me'

Overall Greater Manchester health confidence score (out of 100)

71.4

This is

-0.2

points lower than in July 2024

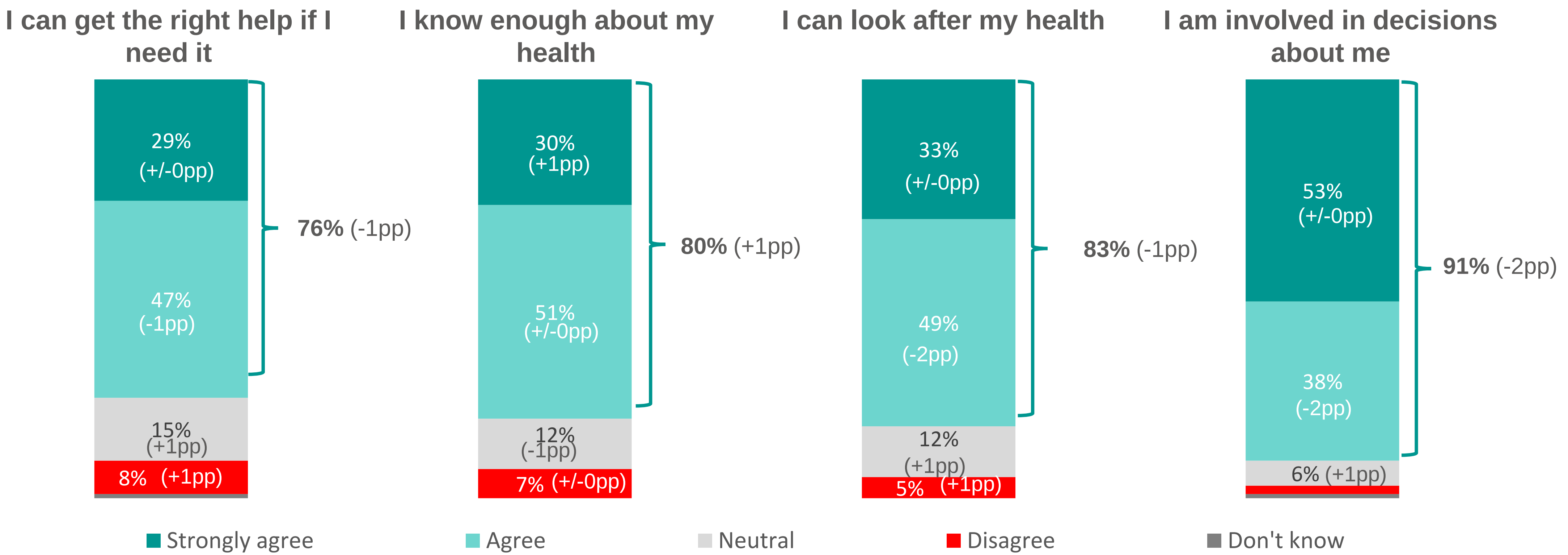
On a 0-100 scale, these thresholds are given the following interpretations:

High	80-100
Moderate	60-79
Low	40-59
Very low	0-39

Wave	HCS
7	70.5
8	71.8
9	71.5
10	70
11	71.4
12	72.1
13	71.6
14	71.4

S14. To what extent do you agree or disagree with the following statements?
Unweighted base: All respondents Survey 14, 1482 (Valid responses)

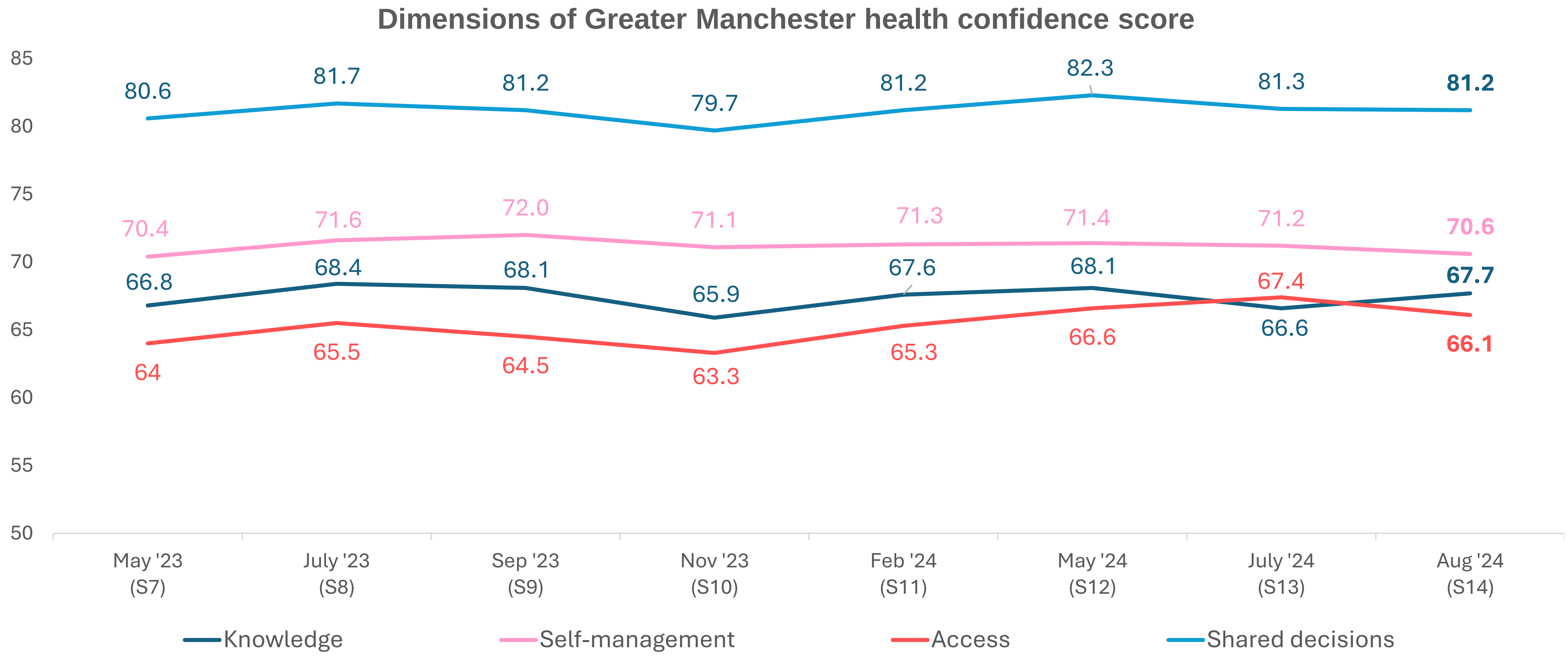
Our data exploring whether respondents agree that they can manage their health – those with "health confidence" – continues to present a broadly positive outlook. Comparisons to July 2024 show a varied set of short-term trends: slightly more respondents agree that they know enough about their health, but dimensions relating to access, self-management and shared decisions show slight declines



Figures in brackets show change since July (S13)

S14. To what extent do you agree or disagree with the following statements?
Unweighted base: All respondents Survey 14, 1482 (All responses)

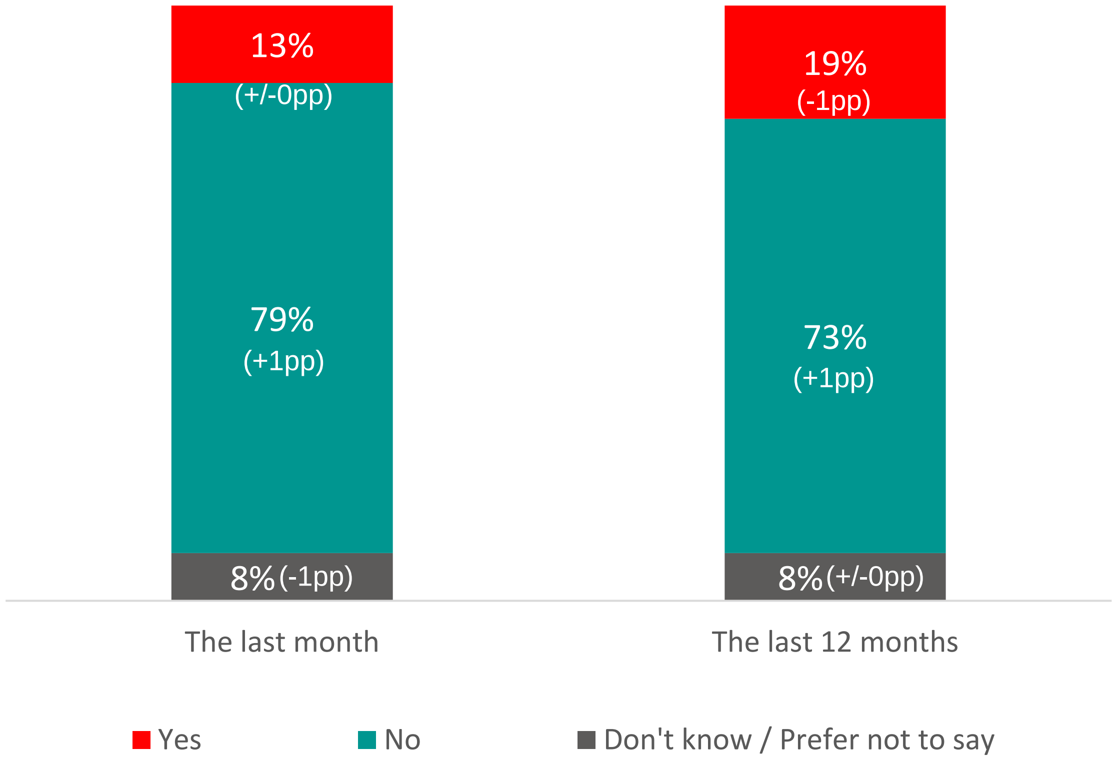
While the overall health confidence score has remained stable since July, there have been decreases in numbers saying they **can get the right help if they need it (access)** - though this is the first decrease in this metric since November last year



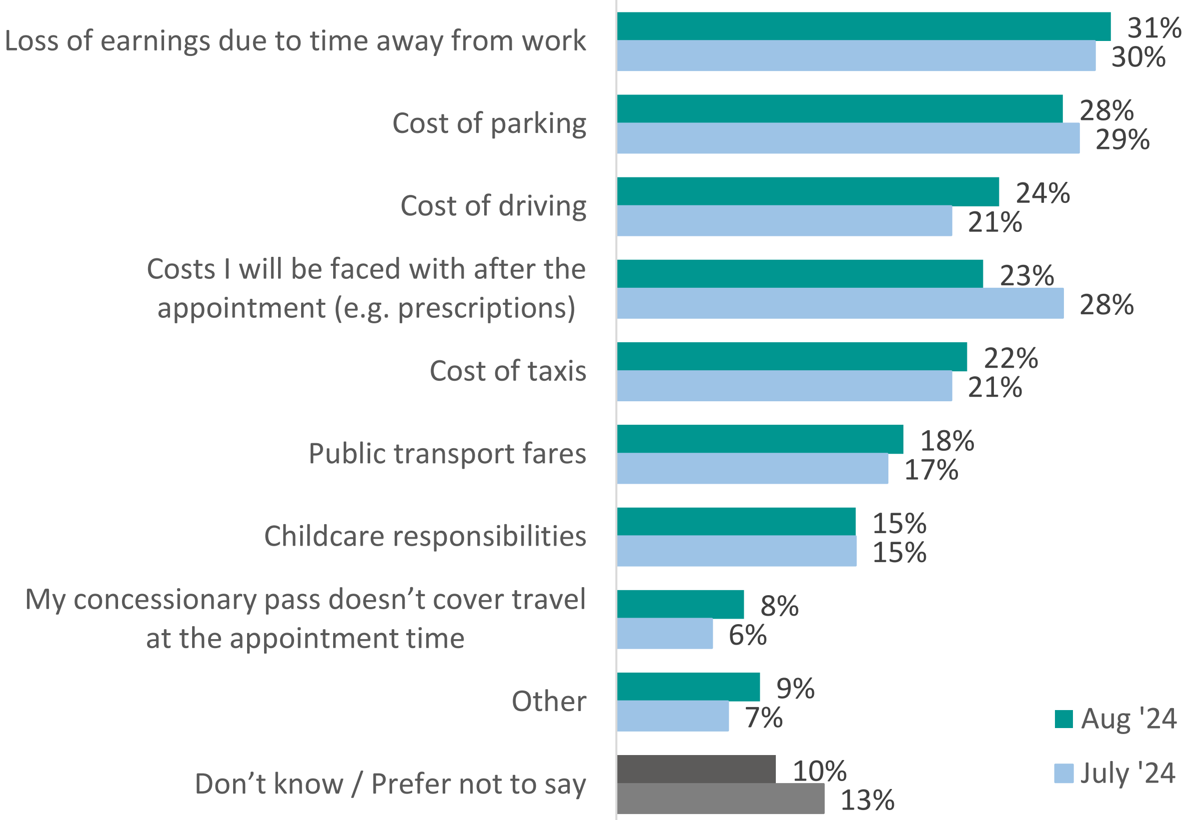
S14. To what extent do you agree or disagree with the following statements?
Unweighted base: All respondents; Survey 7, 1488; Survey 8, 1612; Survey 9, 1560; Survey 10, 1546; Survey 11, 1460; Survey 12, 1,551; Survey 13, 1540; Survey 14, 1482

In line with access falling, more than 1 in 10 (13%) respondents say cost implications have stopped them accessing NHS services in the past month. This rises to 1 in 5 (19%) saying this has occurred in the last year. Loss of earnings, parking costs and cost of driving are the most common barriers

Have there been occasions when you have been unable to access NHS health and / or social care services due to cost implications (such as cost of time away from work, travelling time, public transport costs, cost of parking, childcare costs)?

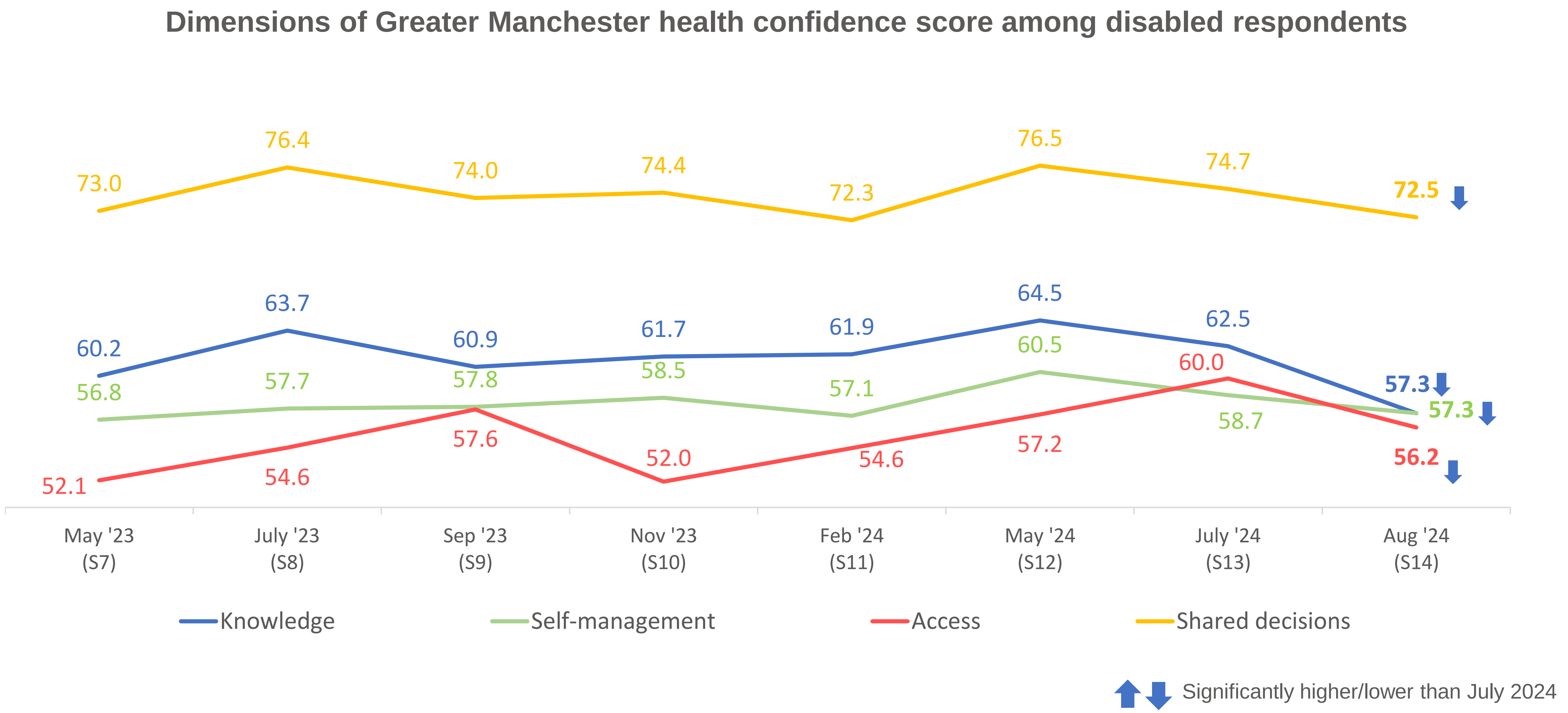


Among those who have been unable, which of the following cost implications explains your reason for not accessing an NHS service (n=306)



NHS4. Have you found [stated situation] has been an issue for you in...? QNHS5. Which of the following cost implications best describes your reason for not accessing an NHS health and/or social care service? Base: All respondents, S13, 1540; S14, 1482 All who have been unable to access NHS services due to cost implications, S13, 368; S14, 306

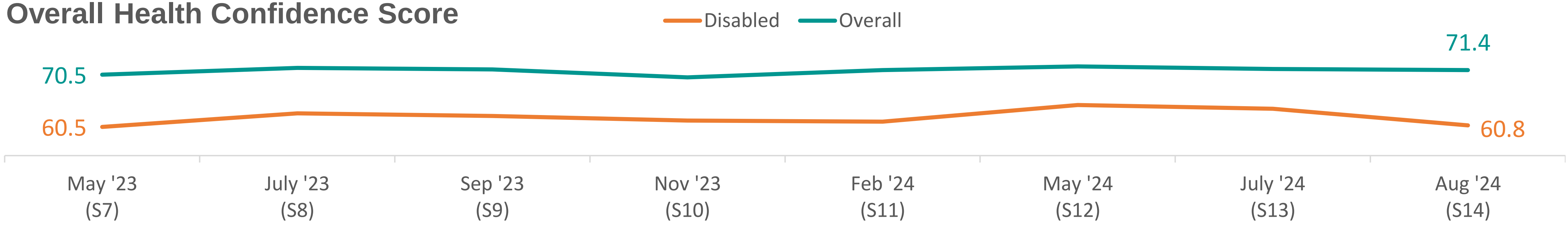
The health confidence score among disabled respondents demonstrates a much starker picture – with all dimensions falling significantly. In particular, August has recorded the lowest ever knowledge score



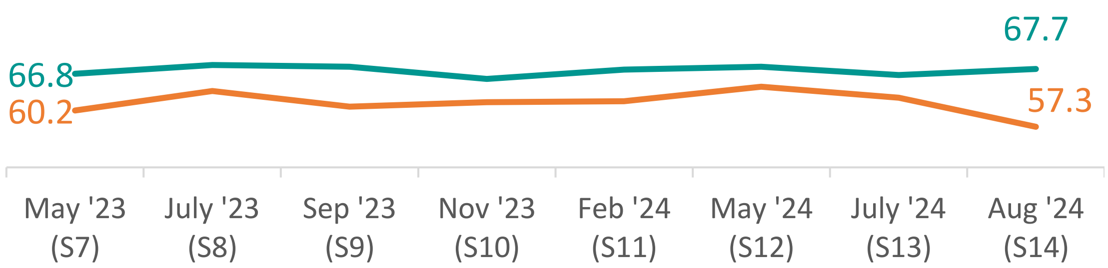
S14. To what extent do you agree or disagree with the following statements?
Unweighted base: All disabled respondents; Survey 7, 374; Survey 8, 417; Survey 9, 412; Survey 10, 385; Survey 11, 346; Survey 12, 394; Survey 13, 416; Survey 14, 194

The overall health confidence score continues to remain lower for disabled respondents than for the general population, with this gap increasing more since July across all dimensions

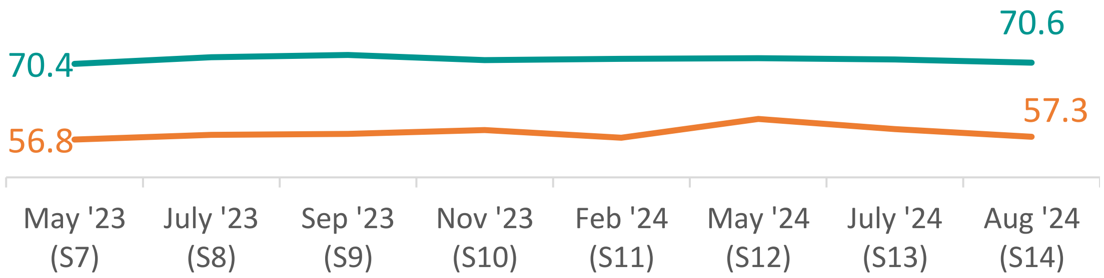
Overall Health Confidence Score



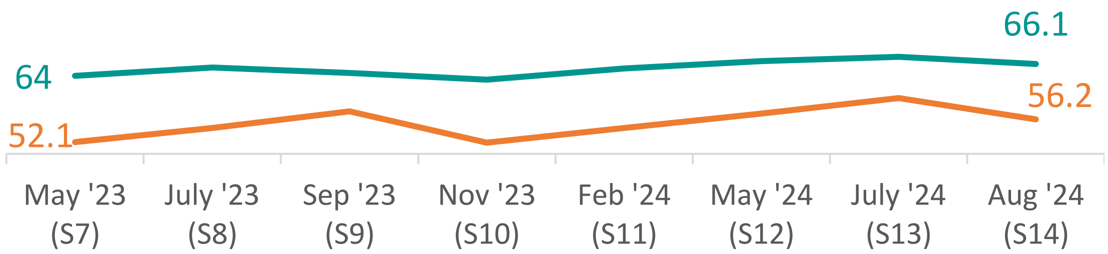
Knowledge



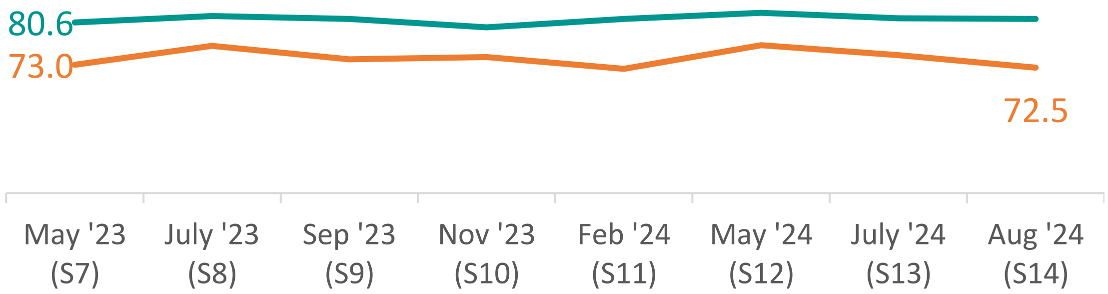
Self-Management



Access



Shared Decisions



S14. To what extent do you agree or disagree with the following statements?
Unweighted base: Survey 14, 1482 (All responses); 370 (Disabled respondents)

The Health Confidence Score among those over the age of 55 with long-term health conditions is 68.3, -3.1 lower than the HCS among the total population but higher than that of disabled respondents (all ages)

On a 0-100 scale, these thresholds are given the following interpretations:

High	80-100
Moderate	60-79
Low	40-59
Very low	0-39

Access
63.9
'I can get the right help if I need it'

Knowledge
68.3
'I know enough about my health'

Self-management
65.4
'I can look after my health'

Shared decision
75.6
'I am involved in decisions about me'

Overall Greater Manchester health confidence score (out of 100)

68.3

This is

-3.1

points lower than the total population

S14. To what extent do you agree or disagree with the following statements?
Unweighted base: All aged over 55 with long term health conditions, Survey 14, 194 (Valid responses)

Your Local Area

Local Area context	page 30
Local Area key findings	pages 31-32
Local Area detailed findings	pages 33-46

Your local area – context

The survey continues to explore residents' experiences of their local area, along with their sense of community, local pride and belonging. The questions have been included to inform local monitoring and evaluation of programmes aiming to increase pride in place and life chances (including those funded through local growth funds such as the UK Shared Prosperity Fund).

As questions on local area have been asked across multiple surveys, we have tracked data over time. We have also merged data where possible, meaning that the sample is larger and more robust and greater analysis of sub-groups is possible. Questions within this section use a merged sample from the results from surveys 12, 13 and 14.

Benchmarks, where included, reflect most recent published national data from the DCMS' Community Life Survey (covering October 2023 - December 2023)*. The DCMS survey is conducted through self-completion, either online or on a paper questionnaire. This is comparable with the Residents' Survey, which (in the main) follows a self-conducted online method.

Survey 14 asked, for the first time, respondents of the importance of different aspects of the Greater Manchester Fire and Rescue Service.

* The Community Life Survey is a key national evidence source for understanding more about community engagement, volunteering and social cohesion, sampling adults (aged 16+) throughout England. Fieldwork for 2023/24 was delivered over two quarters (October – December 2023 and January – March 2024). The Oct – Dec 2023 survey results were published in May 2024, and updated results are due in November 2024

Your local area – key findings (1 of 2)

OVERALL SATISFACTION WITH LOCAL AREA

- Overall satisfaction with respondents' local areas as a place to live has remained the same as July (74%), meaning satisfaction continues to be in line with the England benchmark of 74%
- 79% of respondents would recommend their local area as a place to live. This has remained in line with May 2024 and July 2024 (79% and 78% respectively)

SATISFACTION WITH LOCAL SERVICES AND AMENITIES

Respondents' satisfaction with a range of services and amenities in their local area has been reviewed across surveys spanning back to May 2023:

- Around 2 in 3 respondents have historically been satisfied with the availability of public transport in their area. Satisfaction is then highest for bus services, with less than half of respondents satisfied with train services and trams typically
- Just under half of respondents have historically been satisfied with the conditions of the roads in their area. Satisfaction is around a third for cycle lanes and conditions of paved areas
- 3 in 4 are satisfied with the parks and other green spaces in their local area, 2 in 3 are satisfied with their local services and amenities and over half are satisfied with their nearest town centre. Satisfaction is lower for cultural facilities like museums, theatres and events

NEIGHBOURHOOD AND COMMUNITY

- There have been no recent significant changes around satisfaction with community cohesion – with 76% agreeing that their local area is a place where people from different backgrounds get on well together (was 77% in July). 71% express agreement that their local area is a place where people look out for each other (was 72% in July) with 68% agreeing that they are proud of their local area (was 69%)
- Just over 4 in 5 agree that if they needed help, there are people who would be there for them (82%, was 80% in July), and a similar proportion (79%) agree that if they wanted company or to socialise there are people they can call on (was 77%)
    - When asked how often respondents feel lonely, 10% of GM respondents reported feeling lonely often or always, higher than the 7% of respondents across GB

Your local area – key findings (2 of 2)

INVOLVEMENT IN GROUPS, CLUBS OR ORGANISATIONS

- Just over half (54%) of respondents reported having been involved in a group, club, or organisation in the last 12 months (was 53% in July), which continues to be slightly lower than the England benchmark of 56%
- The most popular type of group, club or organisation to have been involved in is sport / exercise (which includes taking part, coaching, or going to watch), with 24% having been involved in this in some way, followed by hobbies (15%) and religion (15%) – all the same as the proportions reported in July

VOLUNTEERING

- A third (31%) of respondents continue to have volunteered in the last year
- Volunteering is more frequent amongst a range of demographics and August's results have allowed for the identification of new groups who are more likely to have volunteered. These groups include those working in the voluntary or community sector, those with a shared ownership of their homes, and university students

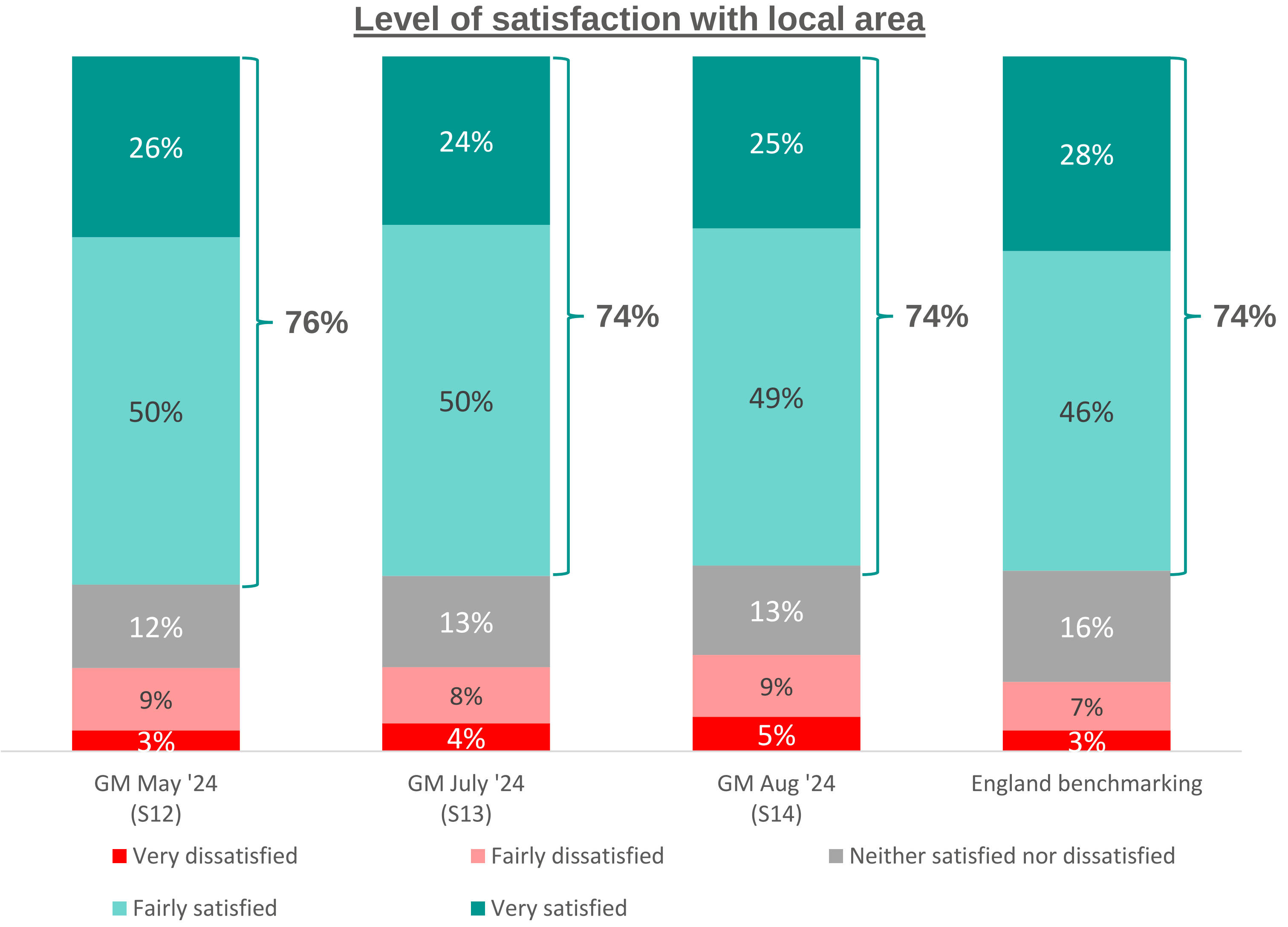
FIRE AND RESCUE SERVICE

Respondents were asked questions around the importance of different parts of work which the Greater Manchester Fire and Rescue Service undertake

- The aspect deemed most important was ensuring that all homes and places of work are safe (85%), with a similar proportion also identifying that the fire service prioritises work to prevent emergencies before they happen (83%) and prioritises spending public money effectively (82%)
- Whilst over half of respondents felt all statements were either essential or very important, the statement which scored lowest focussed on their input into reducing the impact on the climate and environment (58%)

In early August, polling was undertaken among Greater Manchester respondents separately to the survey, using the same scale of statements. In this, the order of priorities found to be essential or very important varies very slightly. However, the top priorities and the bottom priorities are aligned in both sets of data.

Satisfaction with their local area as a place to live remains at 3 in 4 (74%) respondents, and has remained broadly stable since March 2023. This also remains equal to figures representing England



% with 'low' satisfaction of local area compared to Surveys 12-14 GM average (13%)*

Italics denotes greater prominence / newly featuring in latest analysis compared to previous wave

Demographics:

- Those with a disability (22%) including those with mental ill health (24%), a sensory disability (23%), or other disability (23%)

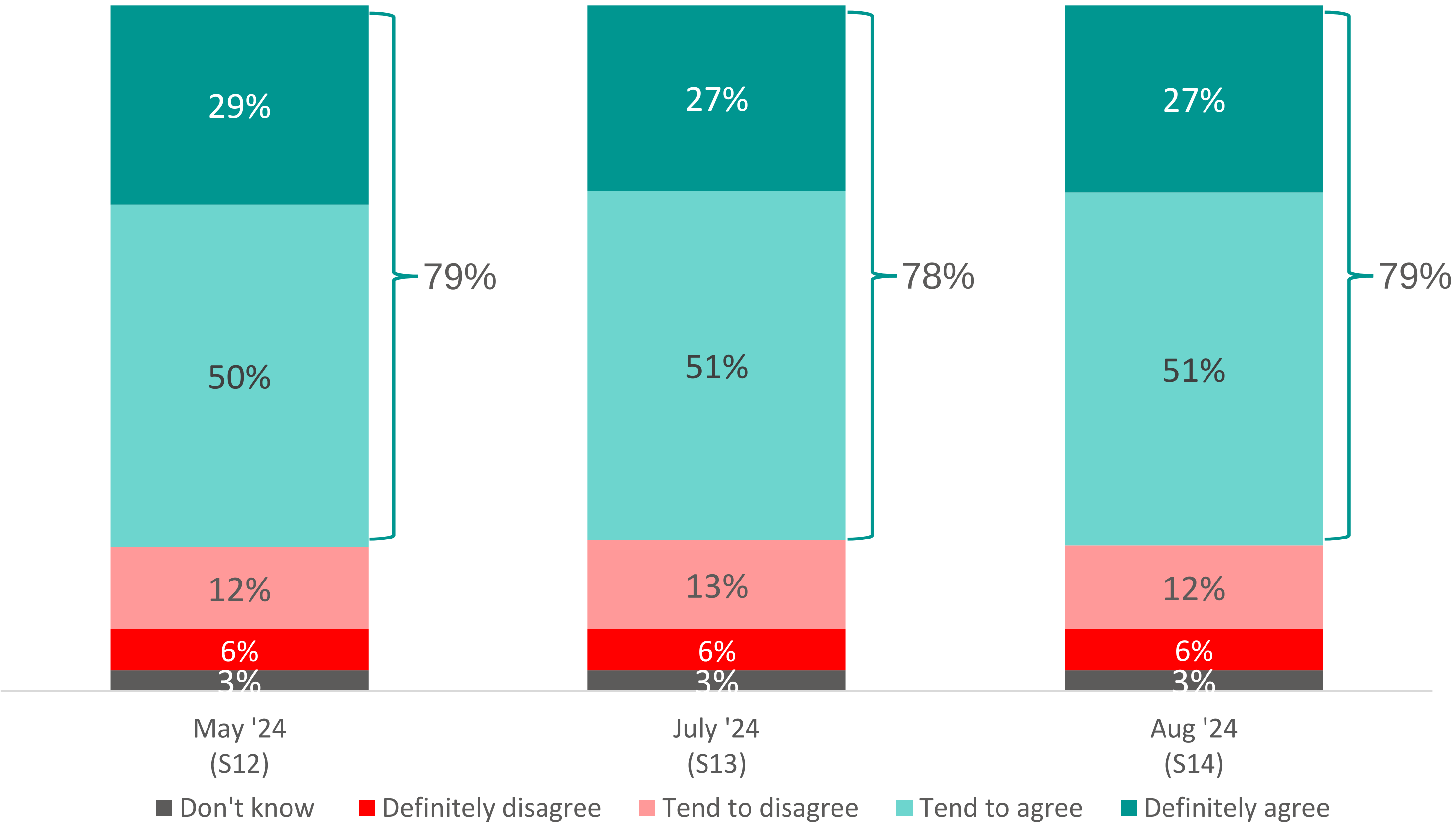
Individual and/or family circumstance:

- Those who would not recommend their local area as a place to live (57%)
- Those who disagree that people in their local area look out for each other (32%)
- *Those not in work due to ill health or disability (32%), or have been out of work for more than 6 months (23%)*
- Those with low levels of life satisfaction (31%)
- *Those who disagree they have the ability to look after their own health (30%)*
- Those with low levels of hopefulness (30%); and feel they are not treated fairly by society (29%)
- *Those struggling with their current level of debt (28%)*
- Those renting their home (16%) specifically those renting from Local Authority / Council (20%) or a Housing Association / Trust (23%)
- Those aged 65+ and who are deprived (22%)

LA2. Overall, how satisfied or dissatisfied are you with your local area as a place to live? *Relates to respondents who are fairly dissatisfied and very dissatisfied.
Unweighted base: Greater Manchester Residents S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482

4 in 5 (79%) would recommend their local area as a place to live – in line with previous surveys. Those more likely to be dissatisfied include respondents with a disability, renters and those in debt

To what extent do you agree or disagree with the statement: I would recommend my local area as a place to live



% who would not recommend their area as a place to live compared to S12-14 GM average (19%)*

Italics denotes greater prominence / newly featuring in latest analysis compared to previous wave

Demographics:

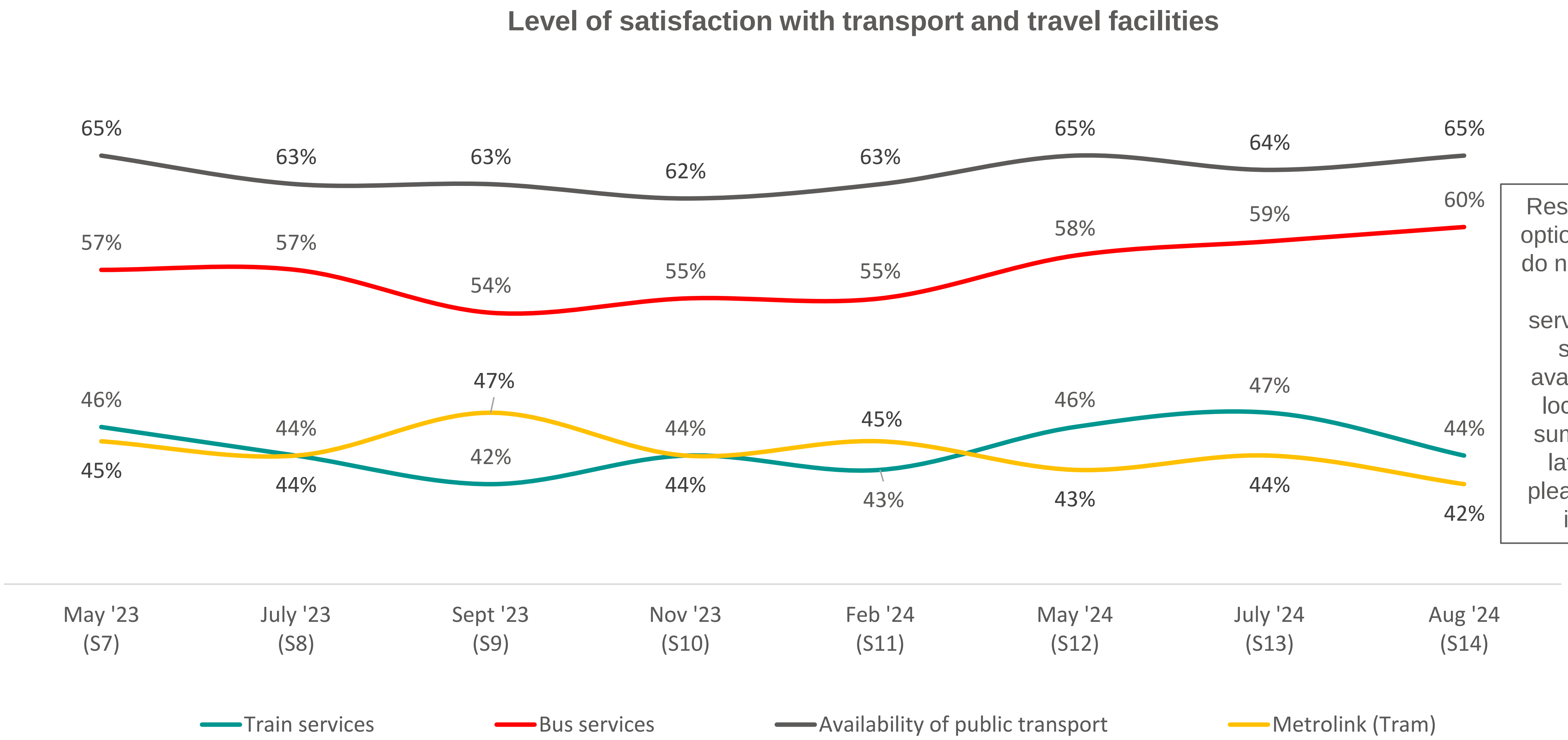
- Gay men or women (34%)
- Those with a disability (29%), including those with mental ill health (34%), a sensory disability (31%) or other disability (29%)

Individual and/or family circumstance:

- Those dissatisfied with their local area (86%)
- Those who do not agree that people from different backgrounds get on well together (50%)
- *Those with very low levels of hopefulness (42%)*
- Those who have been out of work for 6 months or less (39%), or not in work due to ill health or disability (33%)
- Those who do not agree that they are able to look after their own health (37%)
- *Those who disagree there are cultural opportunities in their local area (36%)*
- Those renting their home (26%) specifically those renting from a Local Authority / Council (31%), or a Housing Association / Trust (33%)
- *Those unable to manage their current level of debt (33%)*

LA3. To what extent do you agree or disagree with the statement: I would recommend my local area as a good place to live Unweighted base: Greater Manchester Residents Survey, S11, 1460; S12, 1551; S13, 1540; S14, 1482

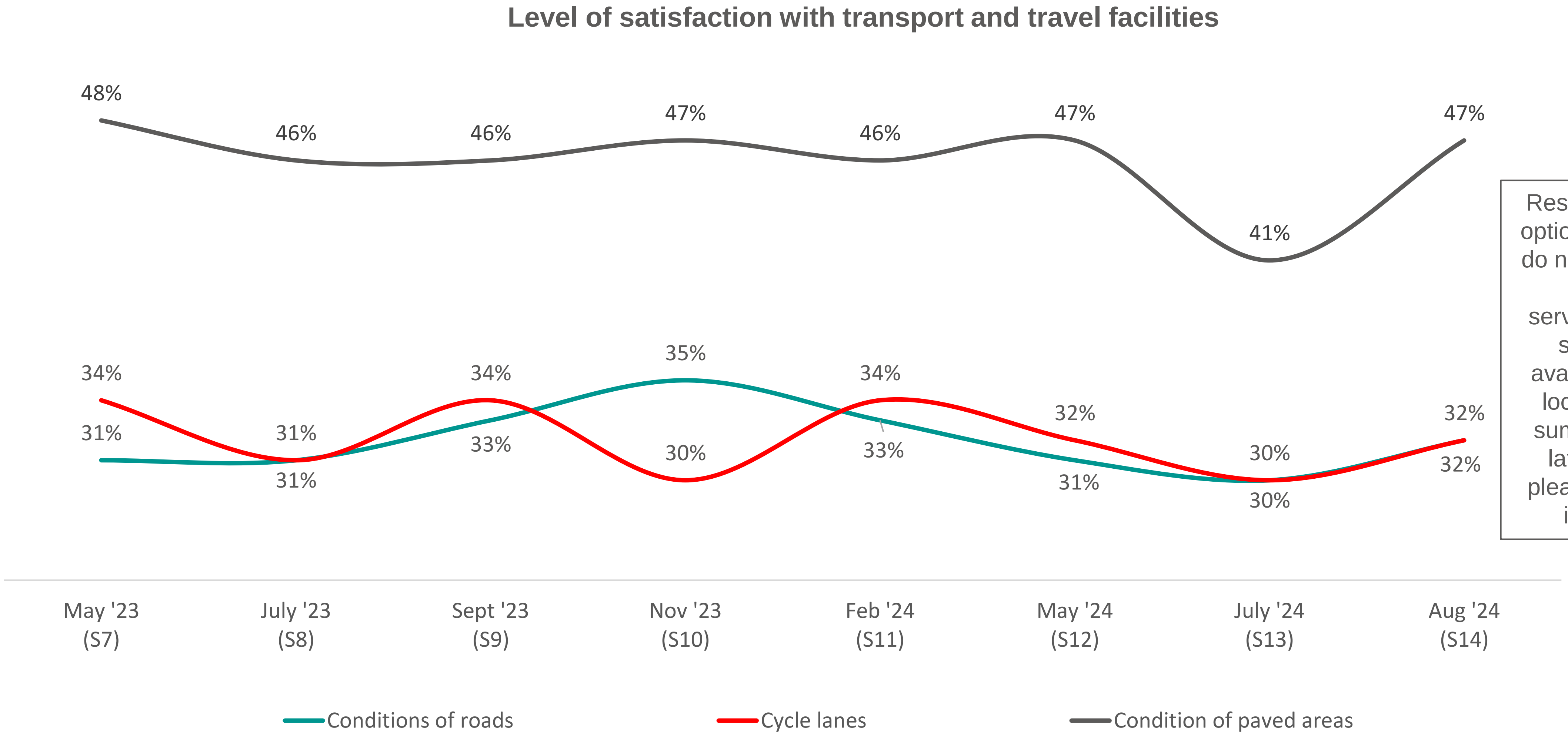
Around 2 in 3 respondents have historically been satisfied with the availability of public transport in their area. Satisfaction is then highest for bus services, with less than half of respondents satisfied with train services and trams typically



Respondents have the option of indicating they do not have experience of a particular service/aspect, or that something is not available at all in their local area. To see a summary table of the latest survey data, please look at slide 84 in the Appendix

LA7. Thinking about where you live, how satisfied or dissatisfied are you with your experience of the following in your local area?
Unweighted base: S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482 (All respondents).

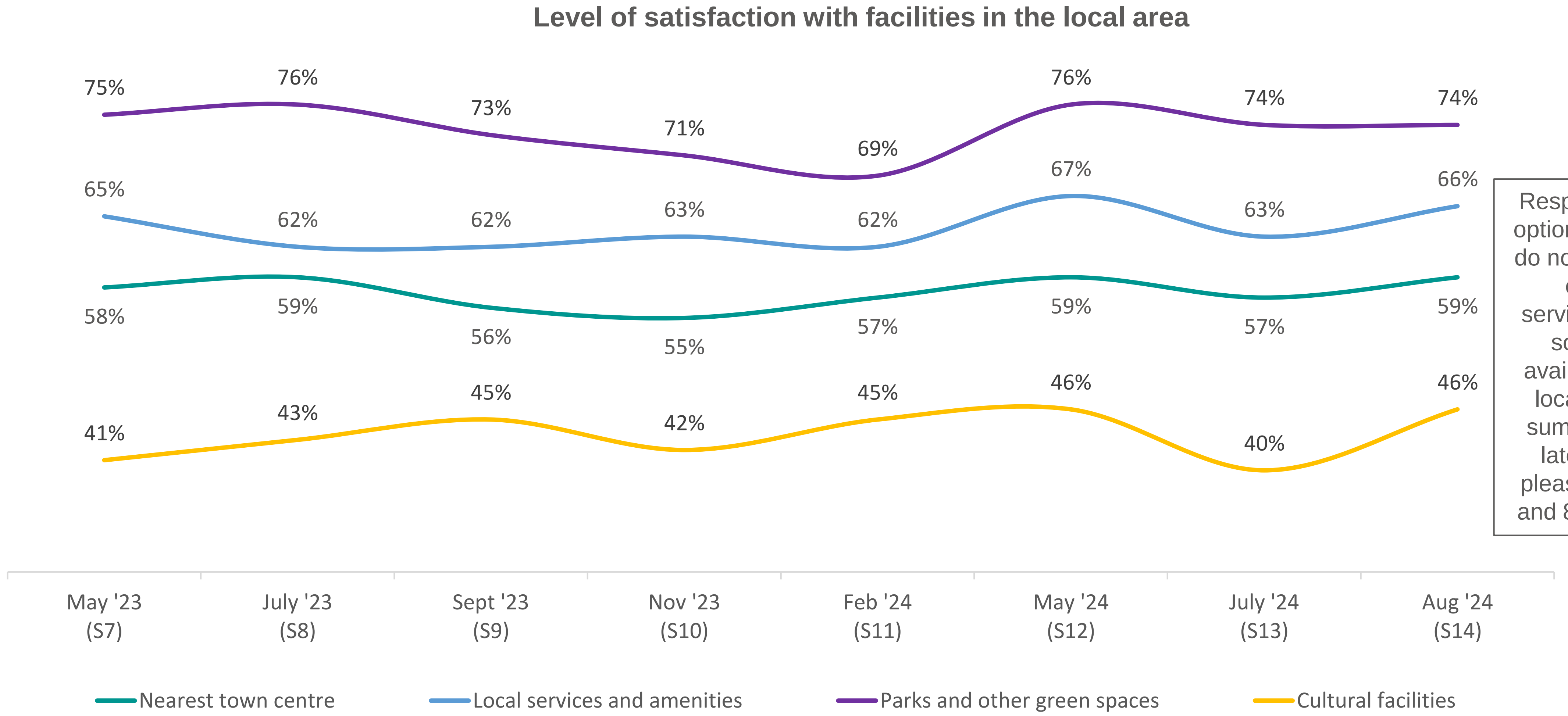
Just under half of respondents have historically been satisfied with the conditions of the roads in their area. Satisfaction is around a third for cycle lanes and conditions of paved areas



Respondents have the option of indicating they do not have experience of a particular service/aspect, or that something is not available at all in their local area. To see a summary table of the latest survey data, please look at slide 85 in the Appendix

LA7. Thinking about where you live, how satisfied or dissatisfied are you with your experience of the following in your local area?
Unweighted base: S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482 (All respondents).

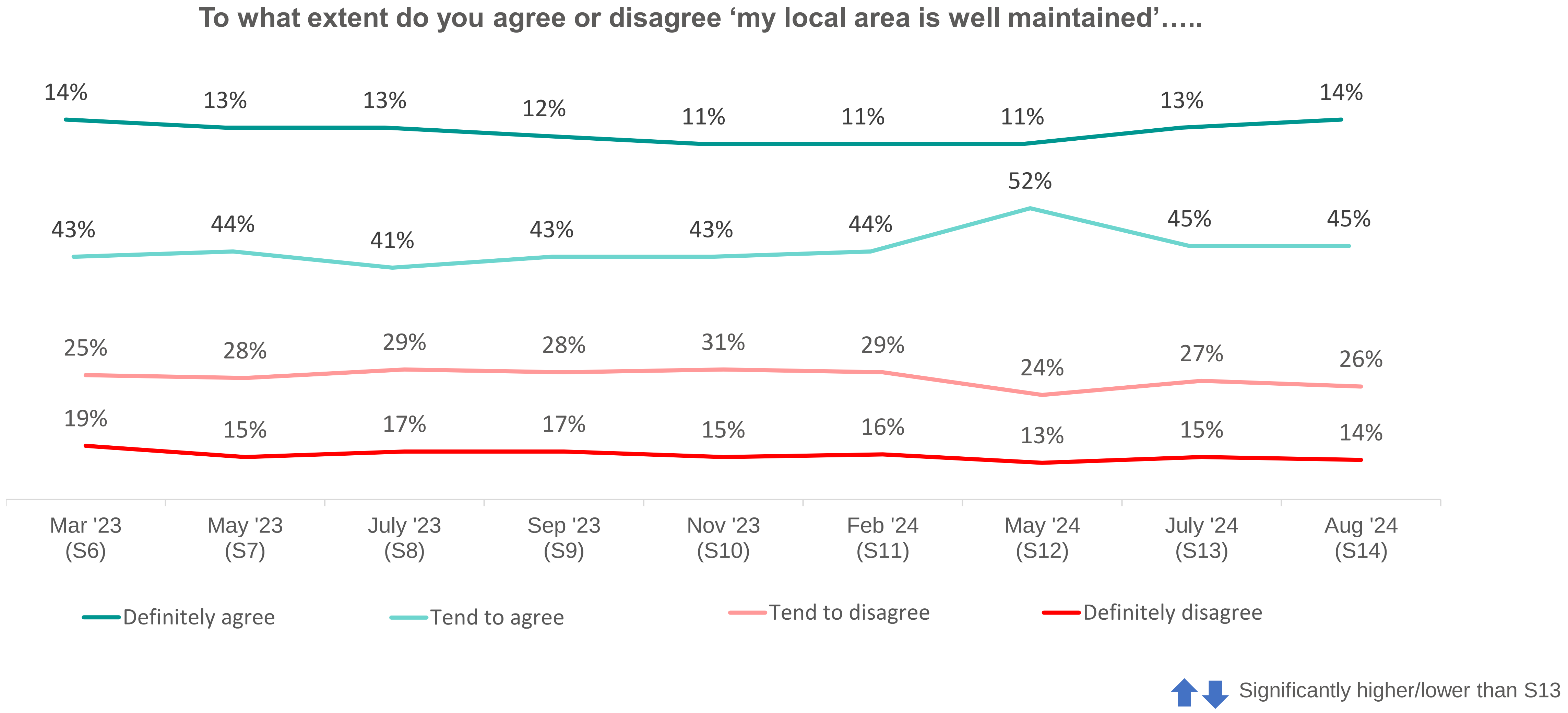
Facilities in the local area have typically higher levels of satisfaction compared with transport services. 3 in 4 are satisfied with the parks and other green spaces in their local area, 2 in 3 are satisfied with their local services and amenities and over half are satisfied with their nearest town centre. Satisfaction is lower for cultural facilities like museums, theatres and events



Respondents have the option of indicating they do not have experience of a particular service/aspect, or that something is not available at all in their local area. To see a summary table of the latest survey data, please look at slide 86 and 87 in the Appendix

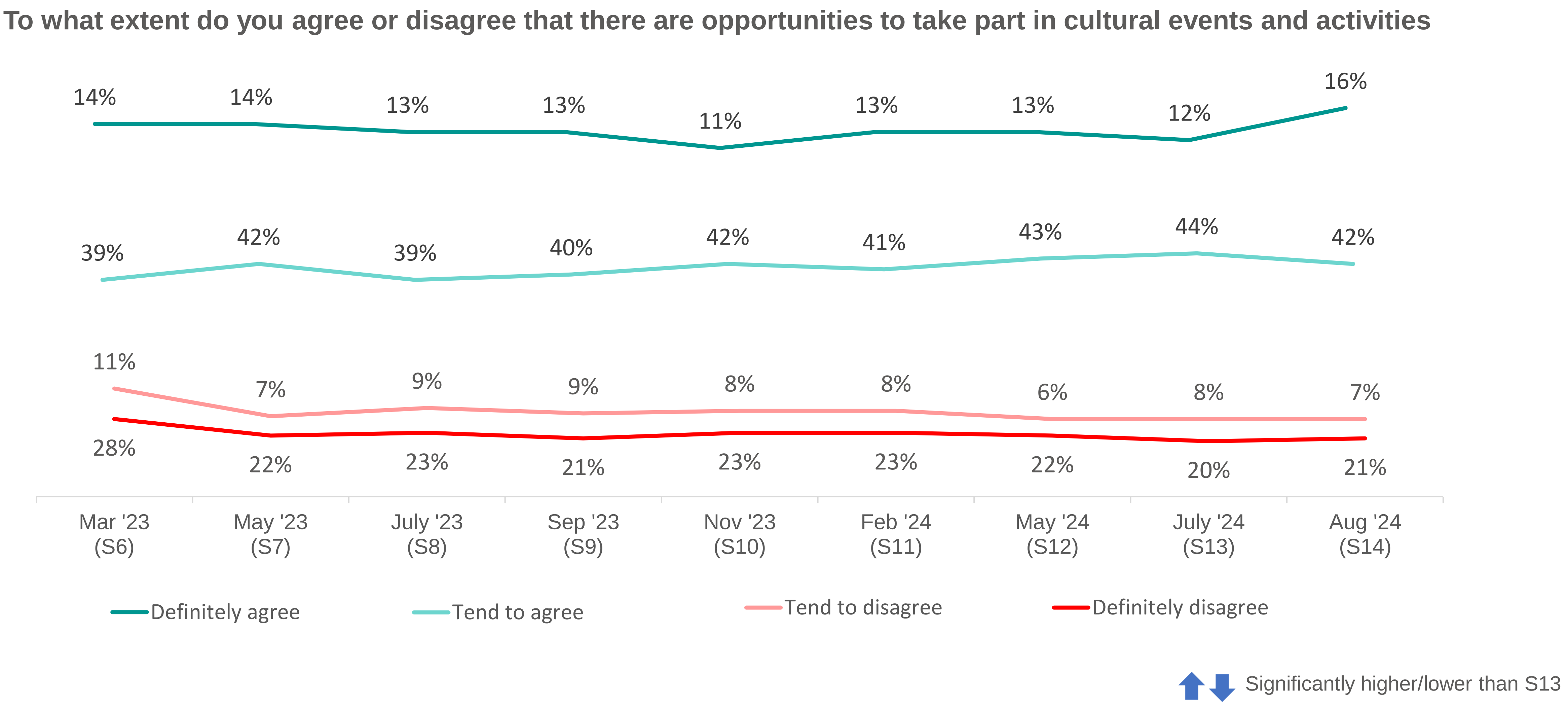
LA4. Generally, how satisfied or dissatisfied are you with…?
Unweighted base: S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482 (All respondents).

The proportion who agree that their local area is well maintained has remained stable with July, with 60% agreeing and 40% disagreeing



LA6. To what extent do you agree or disagree with the following statements about your local area?
Unweighted base: S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482 (All respondents).

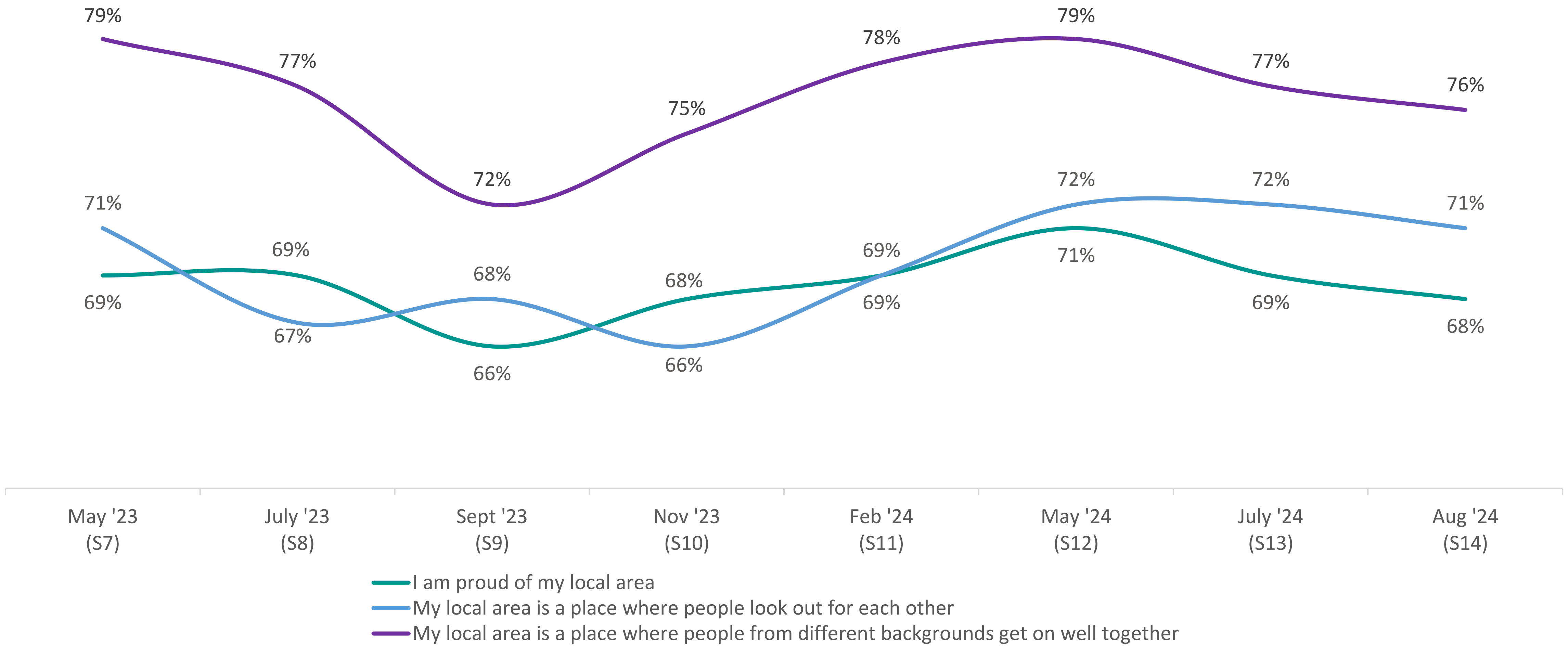
The proportion who agree that there are opportunities to take part in cultural events and activities has remained at around 3 in 5 throughout the surveys



LA5. To what extent do you agree or disagree that there are opportunities to take part in cultural events and activitiess in your local area?
Unweighted base: S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482 (All respondents).

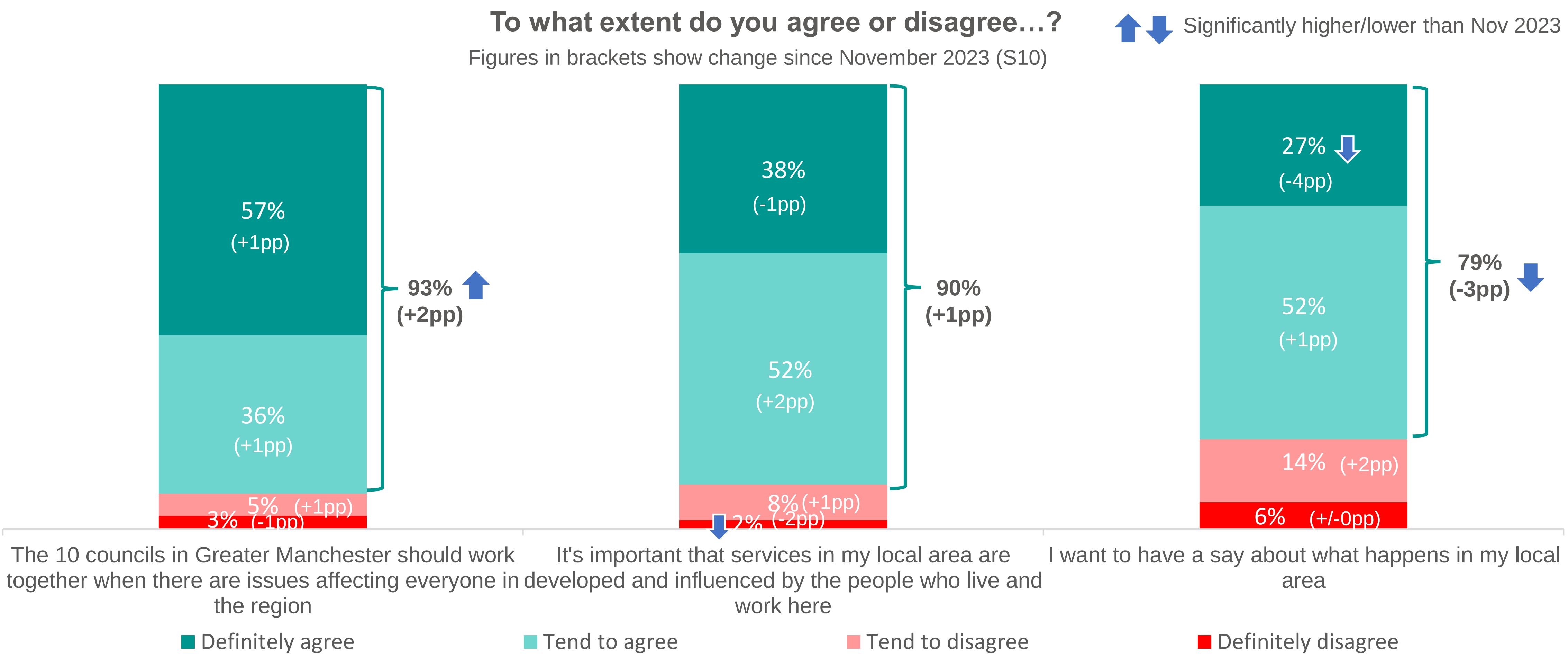
Belief in your local area being a place where people from different backgrounds get on well together sits at around 3 in 4 historically. At around 2 in 3, respondents agree people look out for each other in their local area and that they are proud of it

Level of agreement about neighbourhood relations



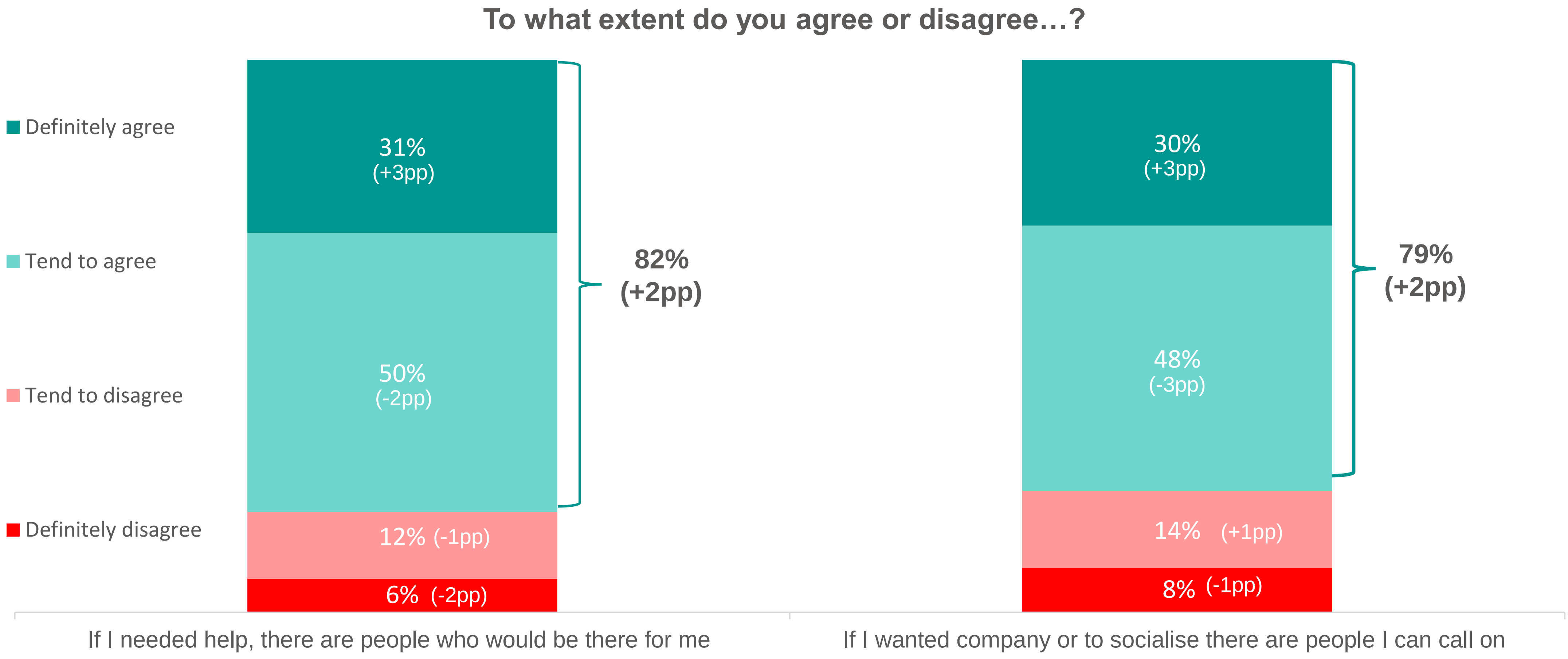
LA6. To what extent do you agree or disagree with the following statements about your local area?) Only valid responses shown
Unweighted base: S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482 (All respondents).

There is widespread agreement from respondents that the 10 councils in GM should work together (93%) on widespread issues and that services are developed and influenced by people who live and work there (90%). 4 in 5 agree they want to have a say about what happens in their local area (79%) - significantly lower than the last time this question was asked in November 2023



LA6. To what extent do you agree or disagree with the following statements about your local area?
Unweighted base: Survey 14, 1482 (All responses) Only valid responses shown

When compared with July, levels of agreement from respondents that others would be there for them if they needed help remain high (82%). A similar proportion – around 4 in 5 (79%) – agree that if they wanted company or to socialise there are people they can call on

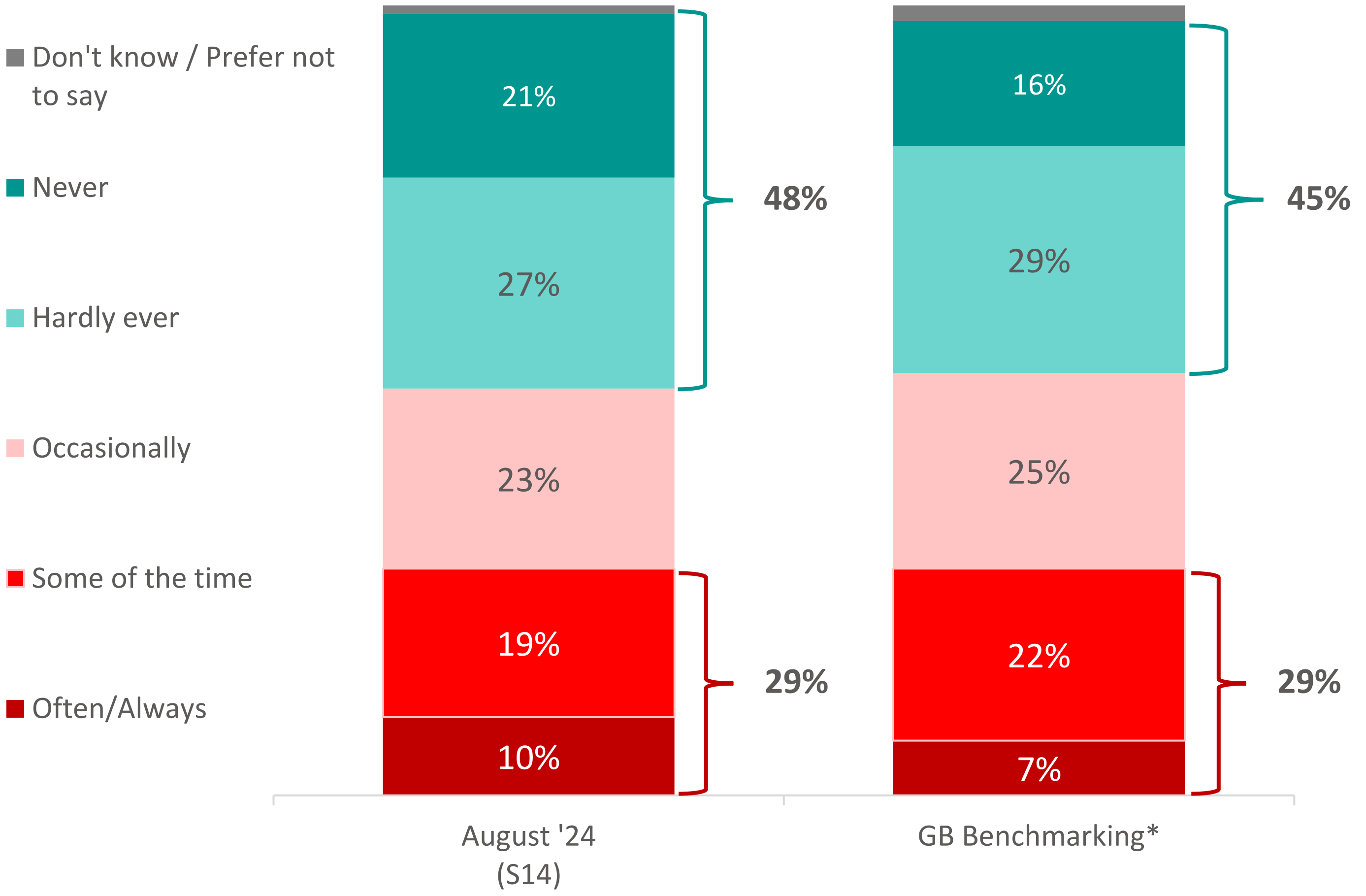


Figures in brackets show change since July (S13)

LA6. To what extent do you agree or disagree with the following statements about your local area? Unweighted base: All respondents Survey 14: 1482 (Valid responses) Only valid responses shown excl. DK/NA. The codes 'There are too few people in the local area' and 'People in this area are all of the same background' have been removed from this chart for visual purposes, meaning chart doesn't add up to 100% *DCMS Community Life Survey uses an online, self-completion method, along with a paper survey approach

For the first time, respondents were asked how often they feel lonely. 10% of GM respondents reported feeling lonely often or always. This is higher than the 7% of respondents across GB. Three in ten (29%) GM respondents reported feeling lonely at least some of the time, in line with the GB equivalent statistic – and is significantly higher among those with a disability, and younger respondents.

How often do you feel lonely?



% who feel lonely at least some of the time compared to surveys 12-14 GM average (29%)*:

Demographics:

- Those with a disability (45%), including those with mental ill health (58%), a mobility disability (41%) and other disabilities (41%)
- 16-24-year-olds (42%)
- Muslim respondents (42%)
- Those with caring responsibilities (37%)

Individual and/or family circumstance:

- Those earning below the Real Living Wage (45%)
- Those living in Manchester (39%)
- Renters (37%), especially those renting from a local authority or council (41%) or renting privately (36%)
- Those in one-person households (34%) or 4 person households (41%)
- Those who have volunteered in the last 12 months (33%)

A5. How often do you feel lonely?
Base: Survey 14, 1482. GB benchmarking taken from UK measures of wellbeing (fieldwork period 5 to 28 July 2024)

Over half (54%) have been involved in a type of group, club or organisation in the past 12 months, slightly lower than the most recently available England average (56%). Almost half, 47%, are involved in a club or organisation not related to sport

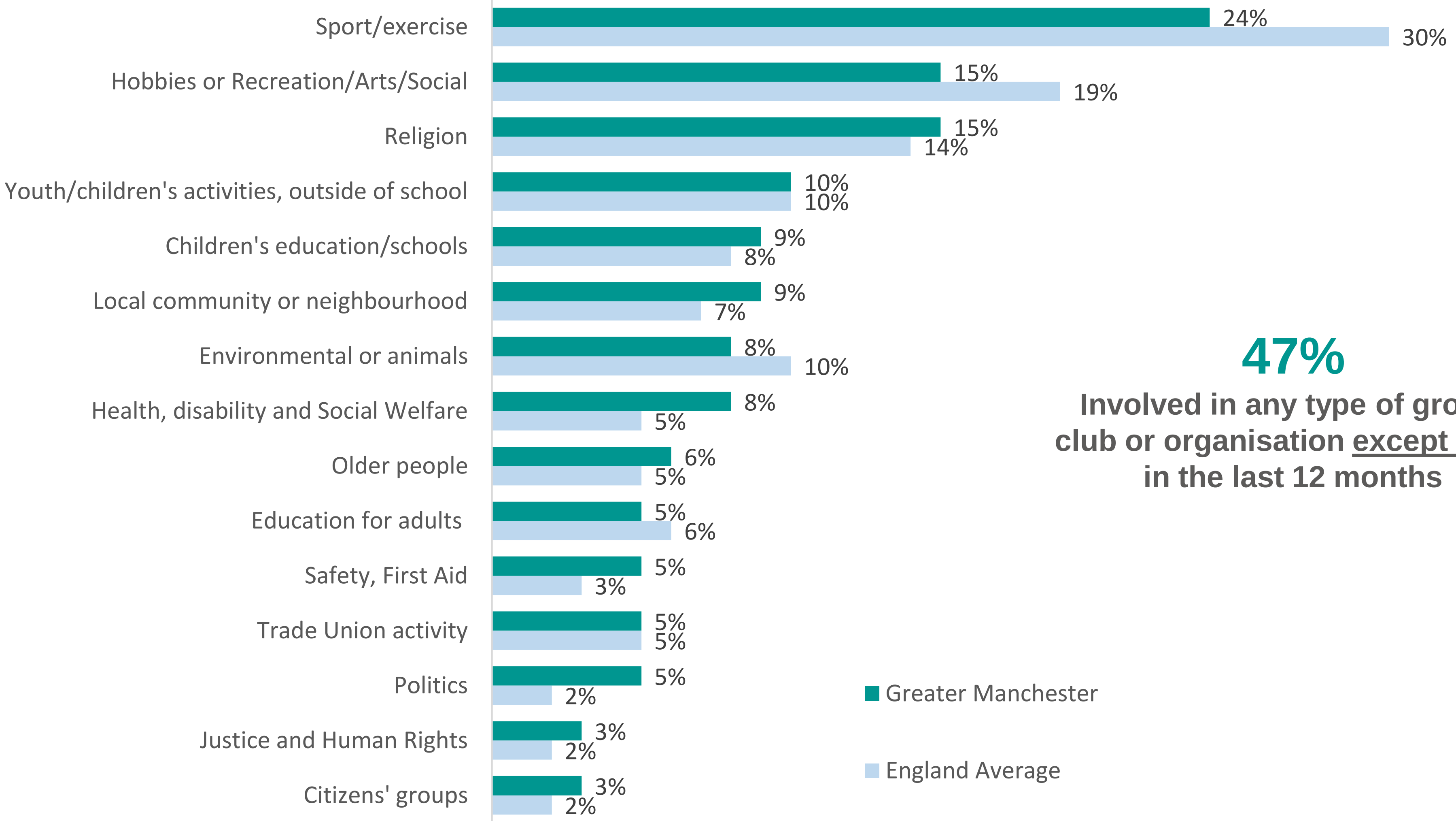
54%

are involved in any club, group or organisation in **Greater Manchester** compared to

56%

in **England** (2021/22 benchmark)

Have you taken part in any clubs, groups or organisations in the past 12 months?



47%

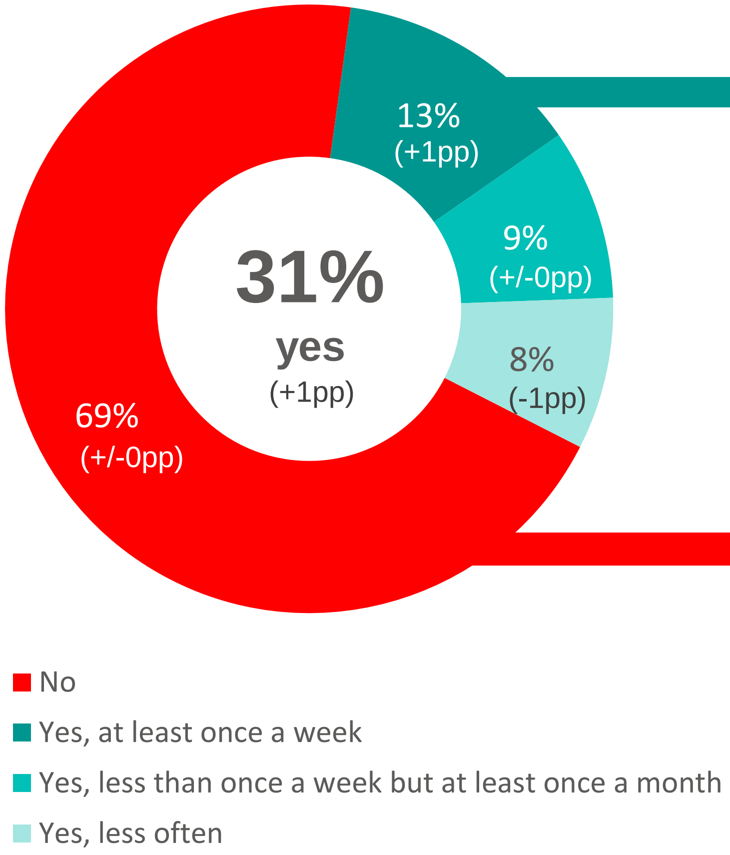
Involved in any type of group, club or organisation except sport in the last 12 months

LW1.. Have you been involved with any of the following types of groups, clubs or organisations during the last 12 months? Unweighted base: 3022 (All respondents, S13+14)
England benchmarking taken from the Community Life Survey 2021/22 (fieldwork period October 2021 to September 2022)

Almost 1 in 3 (31%) respondents have volunteered in the past year. High earners, those in the volunteer sector and those who have previously cared for someone are more likely to have volunteered, while those with no internet access and low confidence online are most likely to not volunteer

Have you taken part in any volunteering for any clubs, groups or organisations in the past 12 months?

Survey 14 (Aug) only



Surveys 12-14 combined: The following groups are more likely to volunteer, compared to the Greater Manchester average (30%)*

Italics denotes greater prominence / newly featuring in latest analysis compared to previous analysis

***63%** African respondents*
61% Those in the voluntary or community sector
***57%** Those who previously had caring responsibilities*
***57%** Those with shared ownership*
49% Those earning above £78,000
***48%** University students*

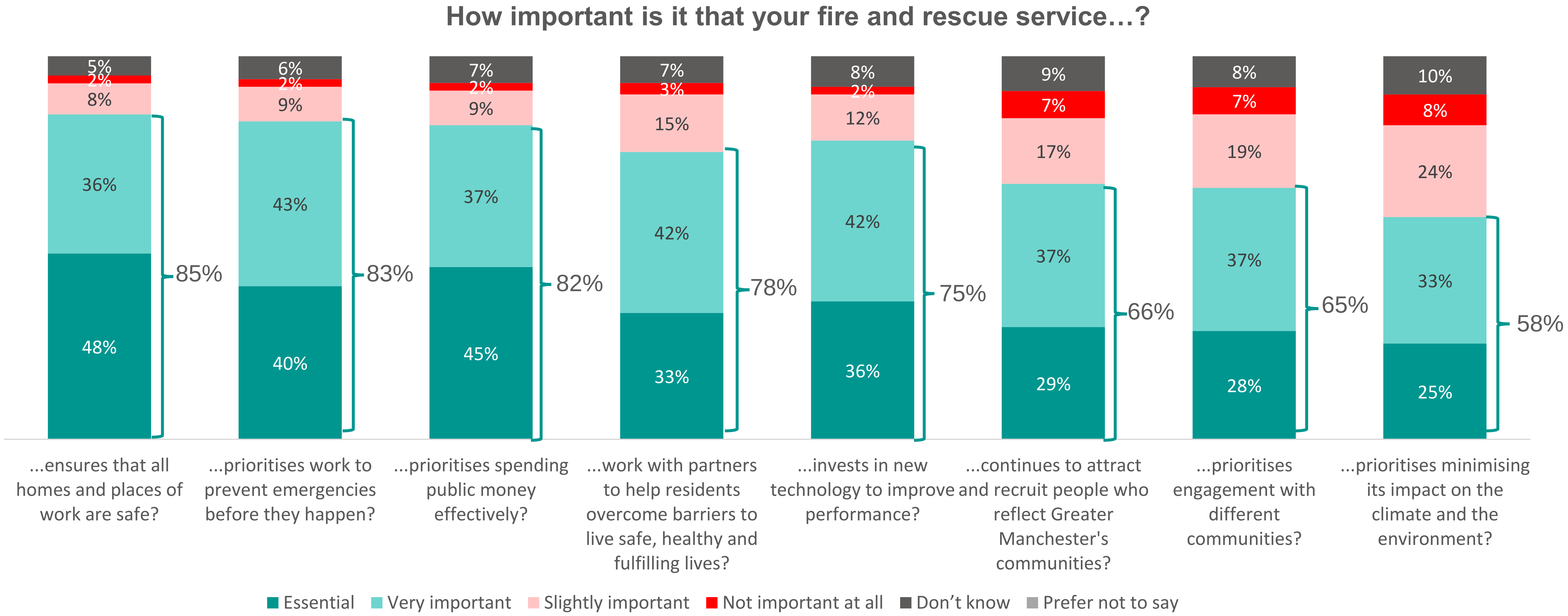
Surveys 12-14 combined: The following groups are less likely to volunteer, compared to the Greater Manchester average (where 69% have not volunteered)*:

95% Those with no access to the internet
94% Those not confident in using digital services
93% Those not in work due to ill health or disability
81% Those renting from local authorities or councils
81% Those aged between 55-64

Significantly higher/lower than S13 Figures in brackets show change since July (S13)

S12. Thinking of the last 12 months, have you taken part in any volunteering for any clubs, groups or organisations? Unweighted base: 1540(All respondents)
*subgroup analysis using data from S11+12+13

All aspects of the fire and rescue service are seen to be important. But respondents are most likely to say it is essential or very important that the services ensures all homes and workspaces are safe (85%) and that they work to prevent emergencies before they happen (83%)



FRS1. How important is it that your fire and rescue service...? Unweighted base: Aug’24 (S14) 1482 (All responses)

Cost of living

Overview and context	page 48
Cost of living key findings	pages 49-50
Cost of living detailed findings	pages 51-67

Cost of living and food security – context and approach

Cost of living has been a central theme in the Greater Manchester Residents' Surveys since September 2022 (and has now been covered across twelve surveys). As questions on cost of living have been asked across multiple surveys, we have tracked data over time. We have also merged data where possible, to create a larger and more robust sample for greater analysis of sub-groups. Many questions within this section use a merged sample from the results from surveys 12,13 and 14.

Data in the cost-of-living section of this report has been compared against the latest survey results from the ONS' Opinions and Lifestyle Survey in Great Britain, where comparable information exists. Fieldwork for this survey in Great Britain is published monthly and so comparisons of the GM survey (fieldwork 19th August – 2nd September 2024) have been compared to the most closely matched ONS fieldwork period, between 7th August – 1st September 2024. ONS uses a mixed methodology, both online and telephone interviews. Please note that some Greater Manchester questions in this section have had their wording or answer options adjusted to reflect changes to the ONS' Opinions and Lifestyle Survey, and so comparisons with Greater Manchester survey 3 and 4 findings may therefore not always be possible.

Cost of living – key findings (1 of 2)

COSTS OF LIVING – OVERALL TRENDS

- Over half of respondents (55%) say that their cost of living has increased over the last month – significantly higher than the Greater Britain average (49%). This figure has remained the same since May 2024
  - While smaller proportions of people in Greater Manchester say their food and fuel costs have increased compared to national figures, these remain the biggest causes of people's increased costs of living – reported by 86% and 65% of respondents, respectively. Alongside these two major drivers, significantly more people in GM are reporting recent increases in their energy, rent, public transport childcare compared to Great Britain as a whole.
  - Since July 2024, the only areas where respondents have reported no increase in cost are the price of home broadband, rent or mortgage costs. The largest increase reported was those saying their energy bills had increased – rising from 61% in July 2024 to 65% in August 2024.
- Food and energy remain 45% of respondents say it is difficult to afford their energy costs – remaining significantly higher than the Great Britain average (35%)
- Over half (53%) of respondents say they would be able to afford an unexpected but necessary expense of £850 – an increase from the 49% reported in July 2024 but still lower than the 3 in 5 (60%) in Great Britain
- 47% of respondents feel they would be able to save money over the next 12 months, while 37% do not think that they would be able to – both 2pp higher than July 2024's results, suggesting some degree of polarisation

Cost of living – key findings (2 of 2)

DEBT AND AWARENESS OF SUPPORT OPTIONS

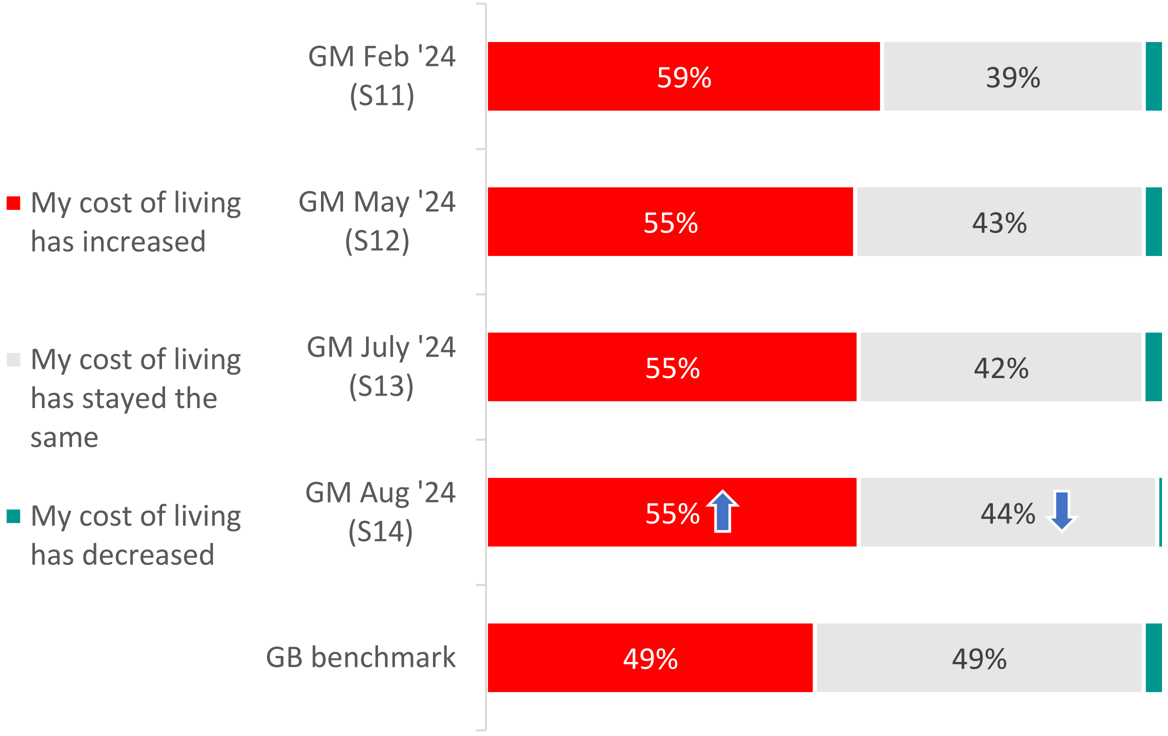
- The proportion of respondents who borrowed more money or used more credit in the past month has remained in line with July at just under 1 in 3 respondents (31%). This figure is significantly higher than in May, but taking a longer-term view is still 3 percentage points lower than at a similar time last year
  - Of the 3 in 10 respondents who have borrowed more money or used more credit in the past month, just under two thirds (64%) say they're having trouble managing their current level of debt. This is lower than the November 2023 figure of 69% (when equivalent questions on debt were last included)
  - Those more likely to be struggling with managing their debt include 45-64 year olds, those who rent their homes, and those with a disability
  - Half (50%) of those struggling with their debt say they have sought help, similar figures to November 2023 when this was last asked (51%). Among those who did not seek support, 1 in 3 (31%) did not seek advice because they were unsure whether the advice would help
- More generally, awareness of types of financial support is consistently lower than that reported when the question was last asked in March 2023, with respondents across July to August 2024 combined reporting significantly less awareness of most types of financial support – apart from free school meals, blue badges and Housing Benefit

HOUSING - ONGOING TRACKING

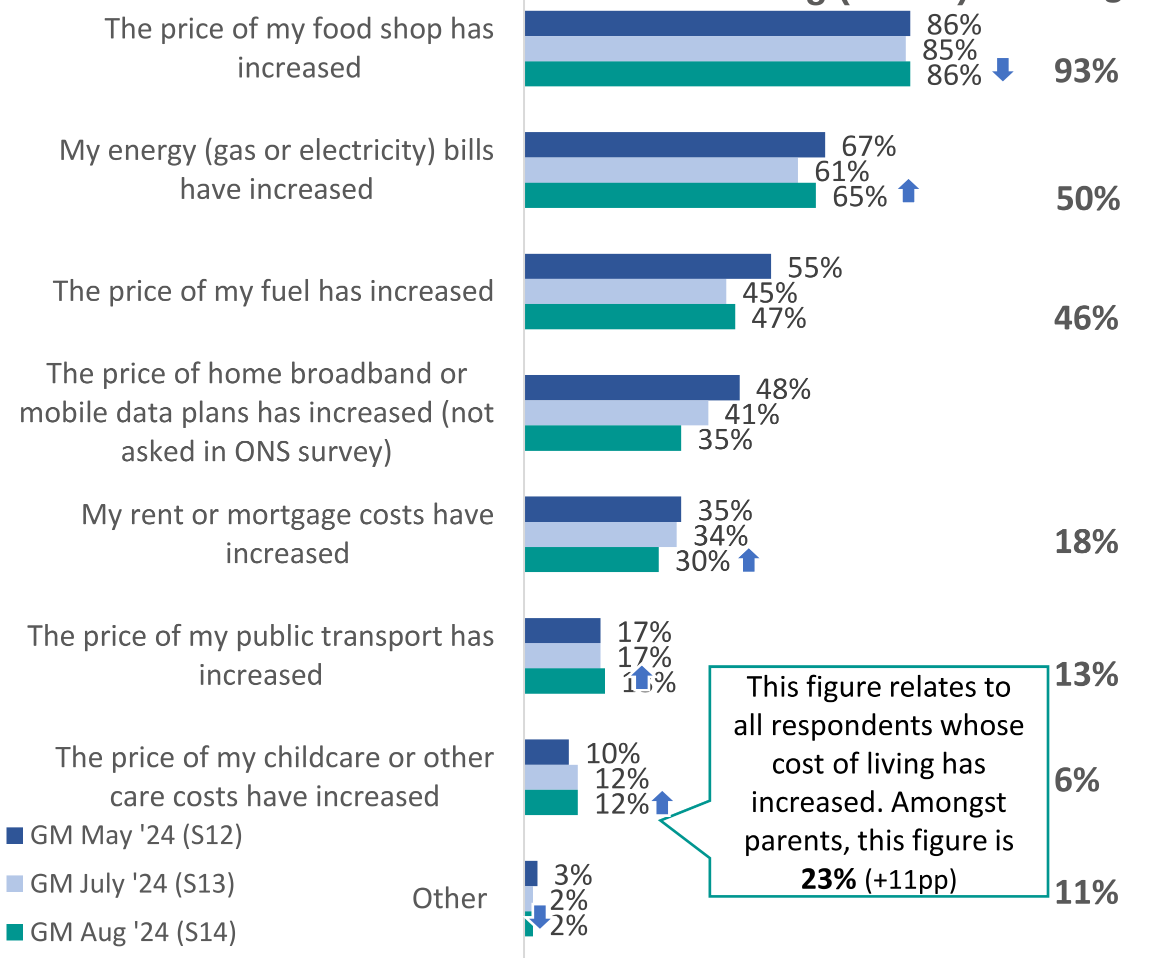
- Long-term trends show volatility among renters in terms of ease of affording rent. From November 2022 until September 2023, renters finding it difficult to afford their rent outnumbered those without such difficulties. This situation reversed during the period September 2023 – May 2024, before a further increase in reported difficulty in the most recent two survey waves
- There is more stability among those with mortgage payments – with a clearer narrative in terms of the balance between those reporting difficulties in affording mortgage payments, and those (the greater proportion) finding things easier

Over half of respondents (55%) say their cost of living has increased in the last month, showing no movement since May but remaining significantly higher than the GB average. GM respondents are more likely than those in ONS surveys to report recent increases in energy, rent/mortgage cost, public transport costs and childcare costs – as also seen in previous waves

Change in cost of living over the last month



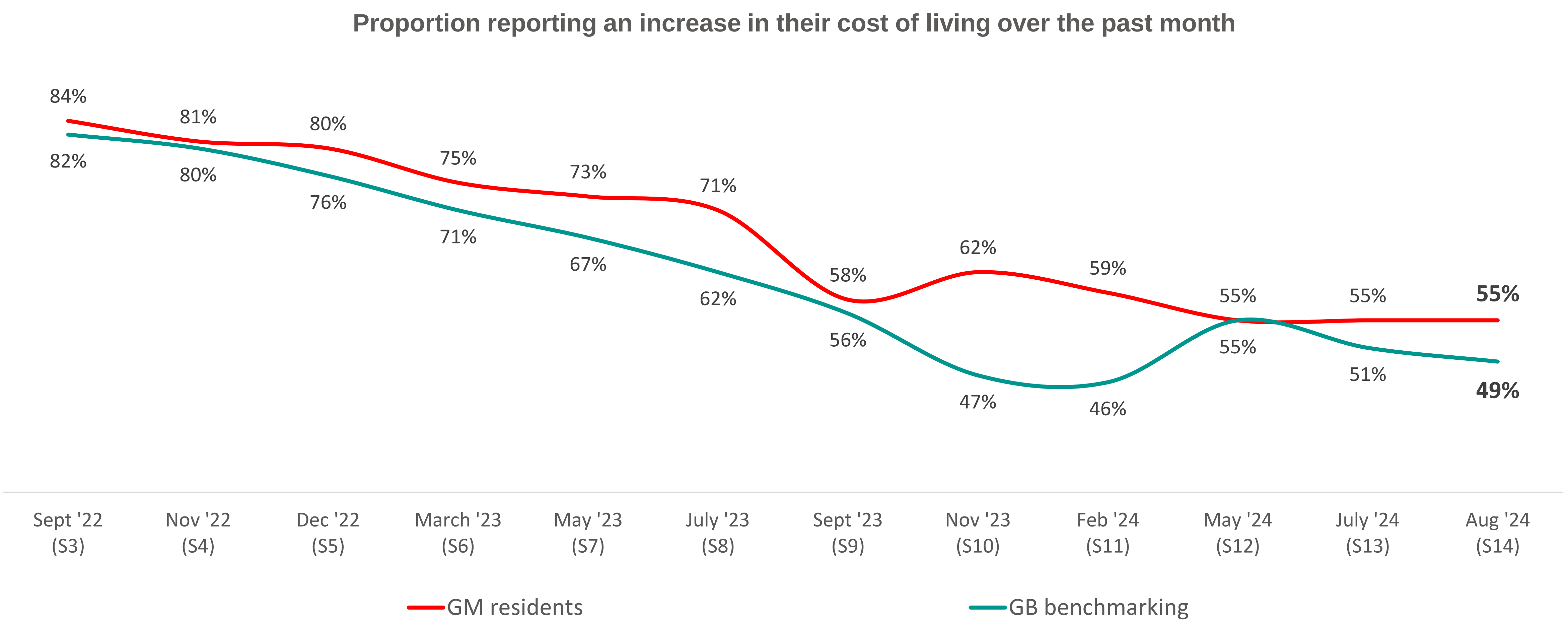
Reasons for increase in cost of living (n=824)



Significantly higher/lower than the GB Benchmark

CL5. Has your cost of living changed compared to one month ago? CL6. Over the last month, in which ways has your cost of living increased? Base: S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482 (All respondents); S12, 854; S13, 836; S14, 824 (All whose cost of living has increased). ONS data, based on national fieldwork 7th August – 1st September 2024

Whilst a gap between GM and the GB average has been re-established since May, the proportion of Greater Manchester respondents saying their cost of living has increased has remained stable since that point

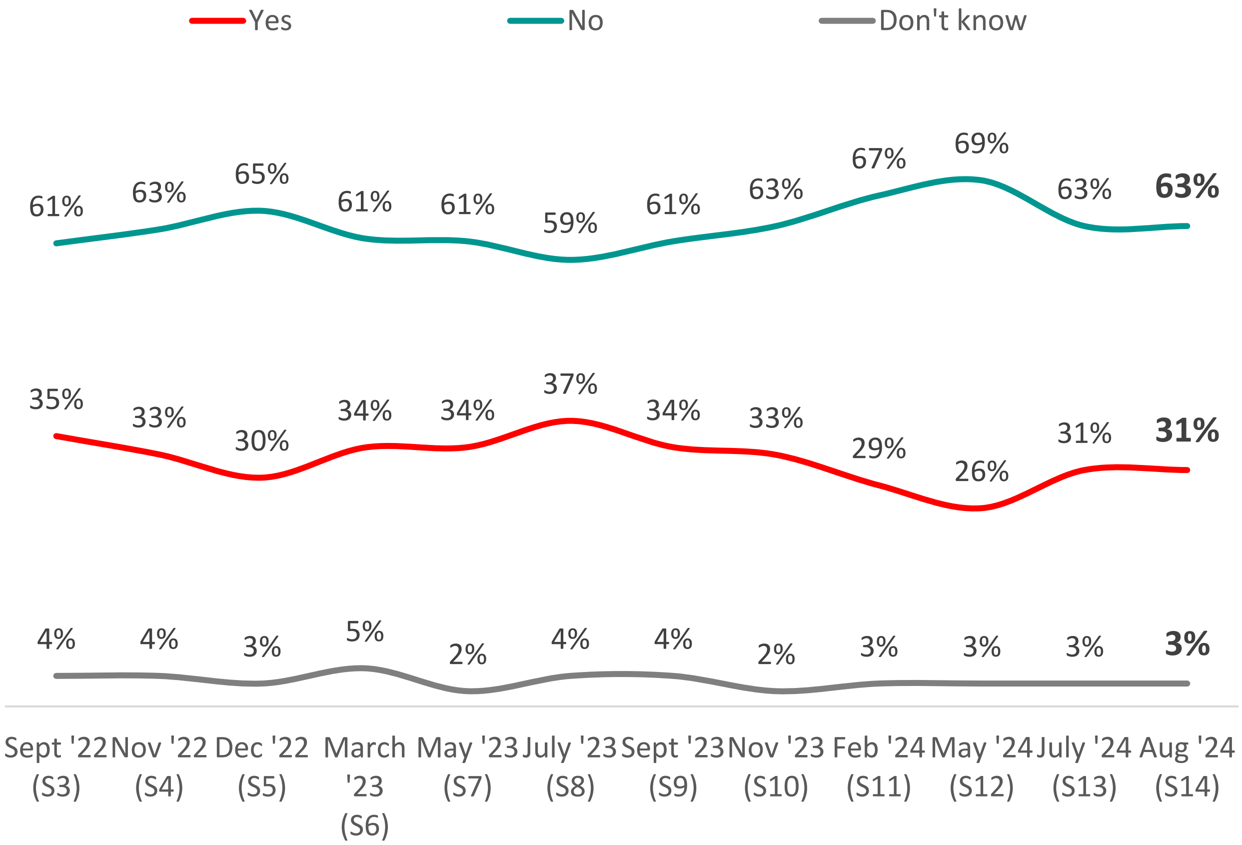


*changes to the ONS wider survey methodology have contributed to a shift in the GB benchmarking since the last GM Residents' Survey

CL5. Over the last month, has your cost of living changed? Unweighted base: Survey 5, 1470; Survey 6, 1767; Survey 7, 1488; Survey 8, 1612; Survey 9, 1560; Survey 10, 1546; Survey 11, 146; Survey 12, 1551; Survey 13, 1540, Survey 14, 1482 (All respondents)

The proportion of respondents who borrowed more money or used more credit in the past month has remained in line with July at just under 1 in 3 respondents (31%). As such, this figure is significantly higher than in May, but still 3 percentage points lower than at a similar time last year

Have you borrowed more or used more credit in the last month than compared to a year ago?



⬆⬇ Significantly higher/lower than S13

Between May and August (S12-14). Those who have borrowed more money or used more credit than usual in the last month, compared to the GM average (29%), are higher among:

Subgroups that continue to feature significantly:

- Those not in work due to ill health or disability (47%)
- Those with low levels of life satisfaction (46%)
- Those renting their home (39%)
- Those with children (38%)
- Those with a disability (38%) including those with mental ill health (51%) or a learning disability (47%)
- Those aged 16-24 (37%) and 25-44 (39%)
- Respondents from Minority Ethnic Groups (35%)
- *Those whose first language is not English (35%)*
- *Female respondents (33%)*

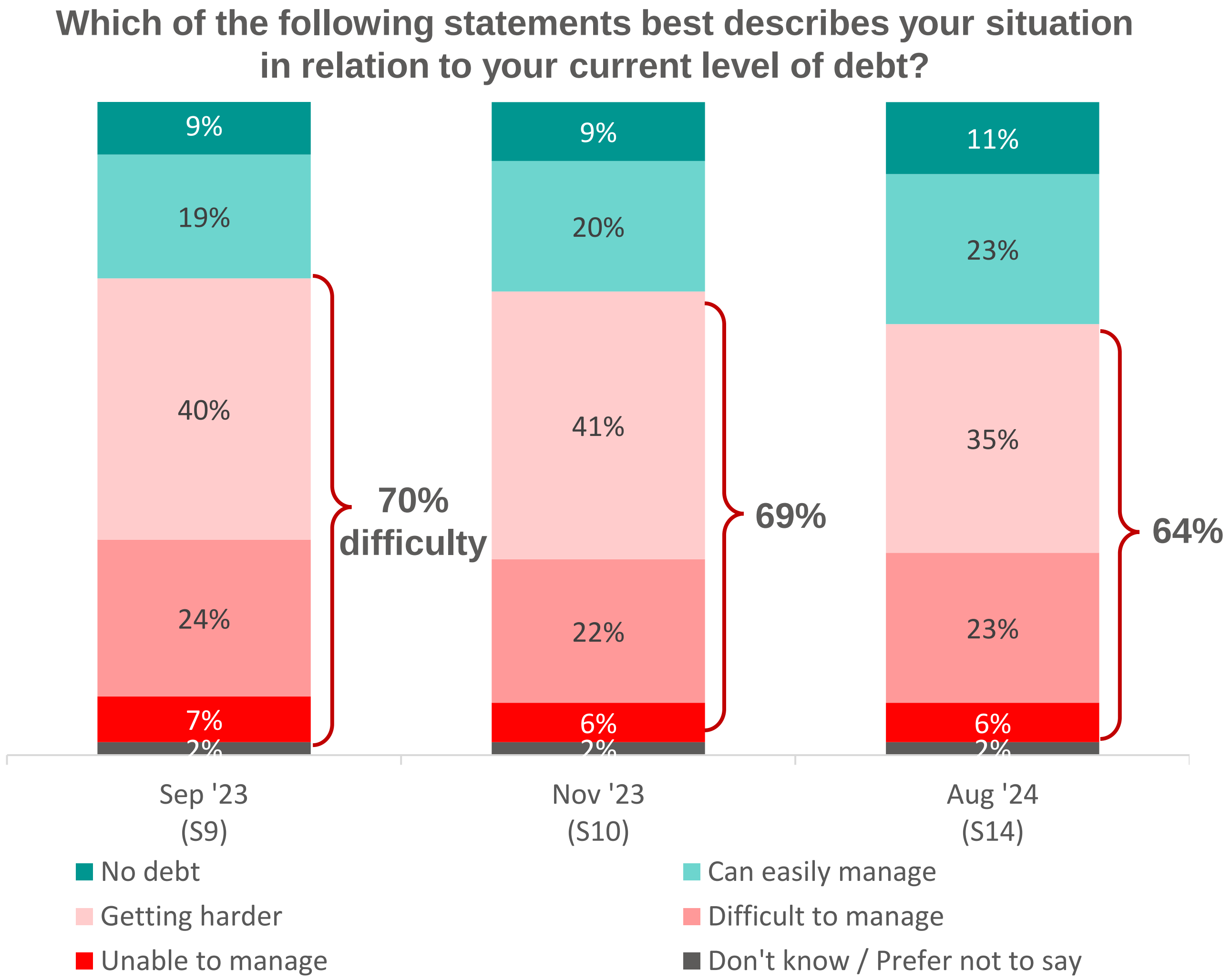
New subgroups found in analysis:

- *Those earning up to £15,599 (43%)*
- *Those with high levels of anxiety (41%)*
- *Those with low levels of hopefulness (35%)*
- *Those living in a household with 4+ people (34%)*

*subgroup analysis uses S12-14 data.

CL3. Have you had to borrow more money or use more credit than usual in the last month, compared to a year ago? Unweighted base: Survey 5, 1470; Survey 6, 1767; Survey 7, 1488; Survey 8, 1612; Survey 9, 1560; Survey 10, 1546; Survey 11, 1460; Survey 12, 1551; Survey 13, 1540, Survey 14, 1482 (All respondents);

Of the 3 in 10 respondents who have borrowed more money or used more credit in the past month, just under two thirds (64%) say they are having trouble managing their current level of debt. This is, however, lower than the November 2023 figure of 69%



In August 2024 (S14), those who are struggling to manage their debt levels, compared to the GM average (64%), are higher among:

Demographics:

- Those aged 45-54 (77%)
- Those who have a disability (72%) including those with mental ill health (81%) and those with a mobility disability (76%)

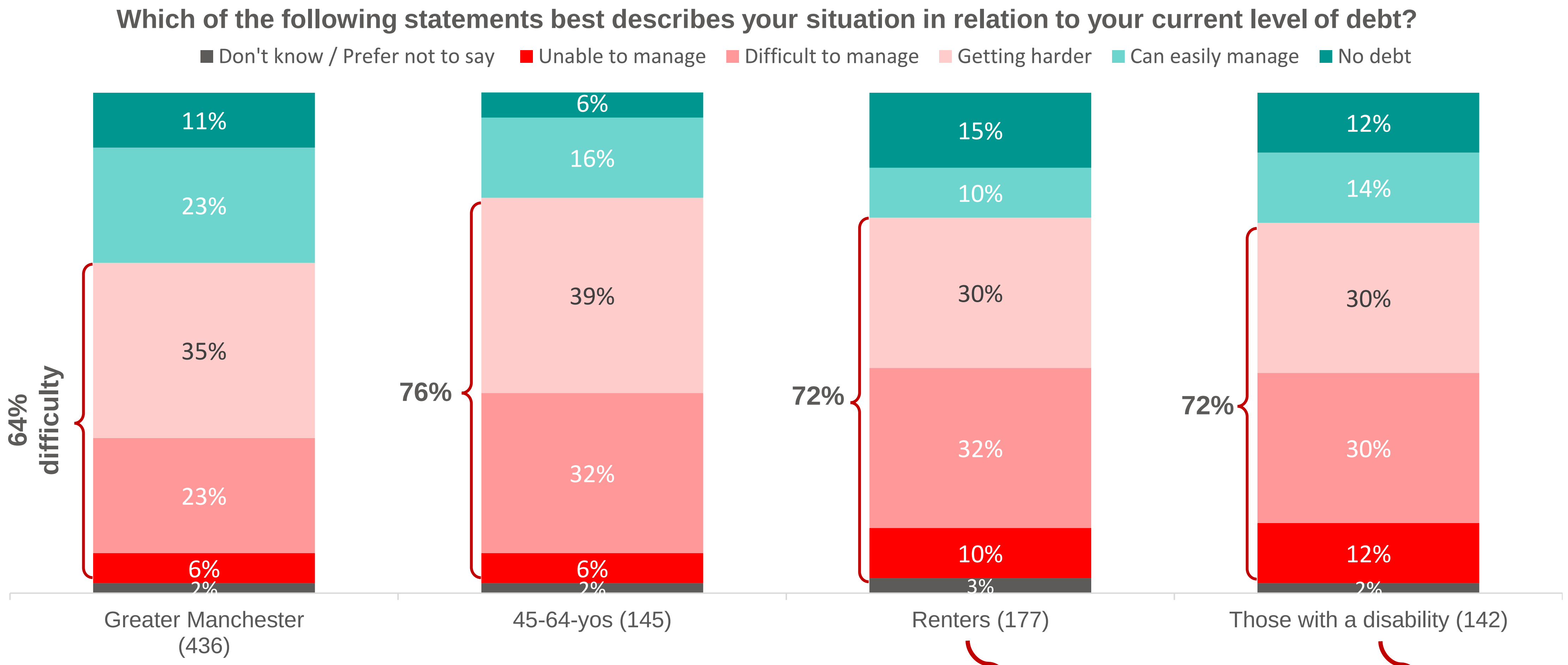
Individual and/or family circumstance:

- Those with low levels of life satisfaction (85%)
- Those who are financially vulnerable (85%)
- Those who will not be able to save any money in the next 12 months (84%)
- Those who feel they are treated unfairly by society (78%)
- Those renting their home from a housing association or trust (77%)
- Those who find it difficult to afford their mortgage (76%)
- Those who are not satisfied with their local area (76%) or rent (75%)
- Those who would not recommend their local area (74%)

Significantly higher/lower than Survey 10

CL3E. Which of the following statements best describes your situation in relation to your current level of debt? Unweighted base: Survey 9, 491; Survey 10, 480; Survey 14, 436 (All who have borrowed more money / used more credit)

Those more likely to be struggling with managing their debt include 45-64 year olds, those who rent their homes, and those with a disability



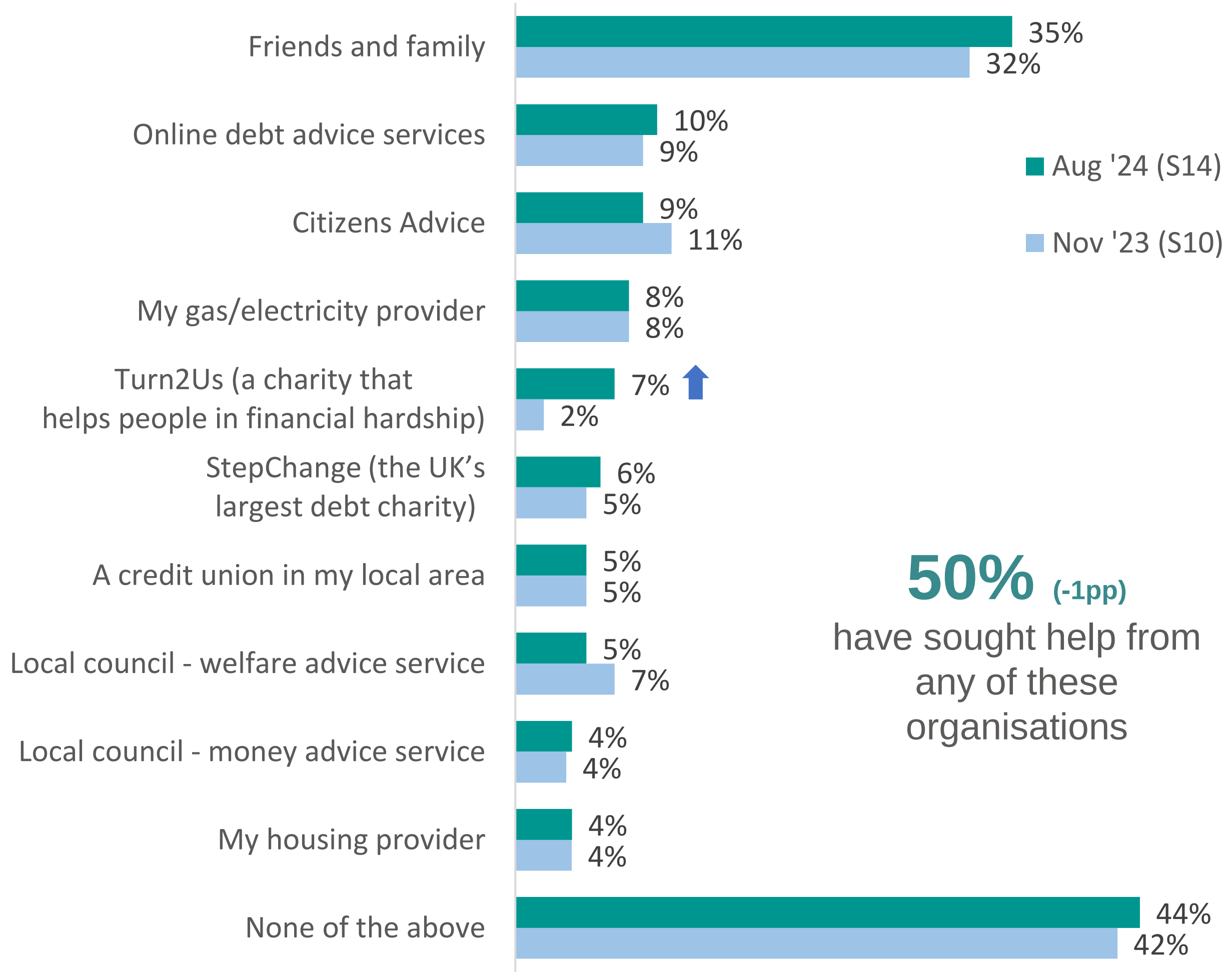
Highest among those renting from a Local Authority / Council (84%)

Highest among those with a mobility disability (76%) and with mental ill health (81%)

CL3E. Which of the following statements best describes your situation in relation to your current level of debt?
Data shown is from S14 (436). Unweighted bases in parentheses (Those experiencing debt).

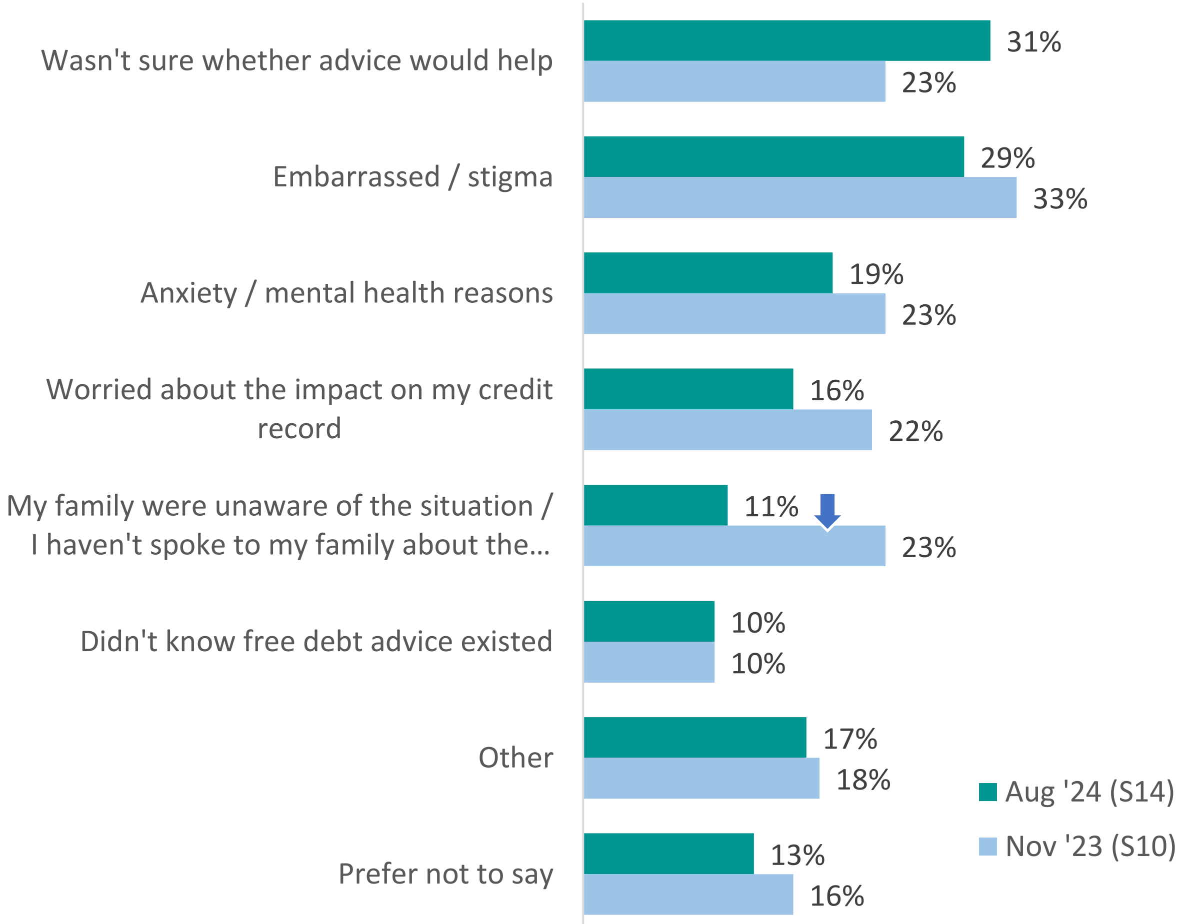
Half (50%) of those struggling with their debt say they have sought help, similar figures to November 2023 when this was last asked (51%). Among those who did not seek help, 1 in 3 (31%) did not seek advice because they were unsure whether the advice would help

Among those experiencing some difficulty, have you tried to seek help with your debt through any of the following options?



Only codes above 4% shown

Among those who have not sought advice, for what reasons have you decided not to seek advice for your debt problems?

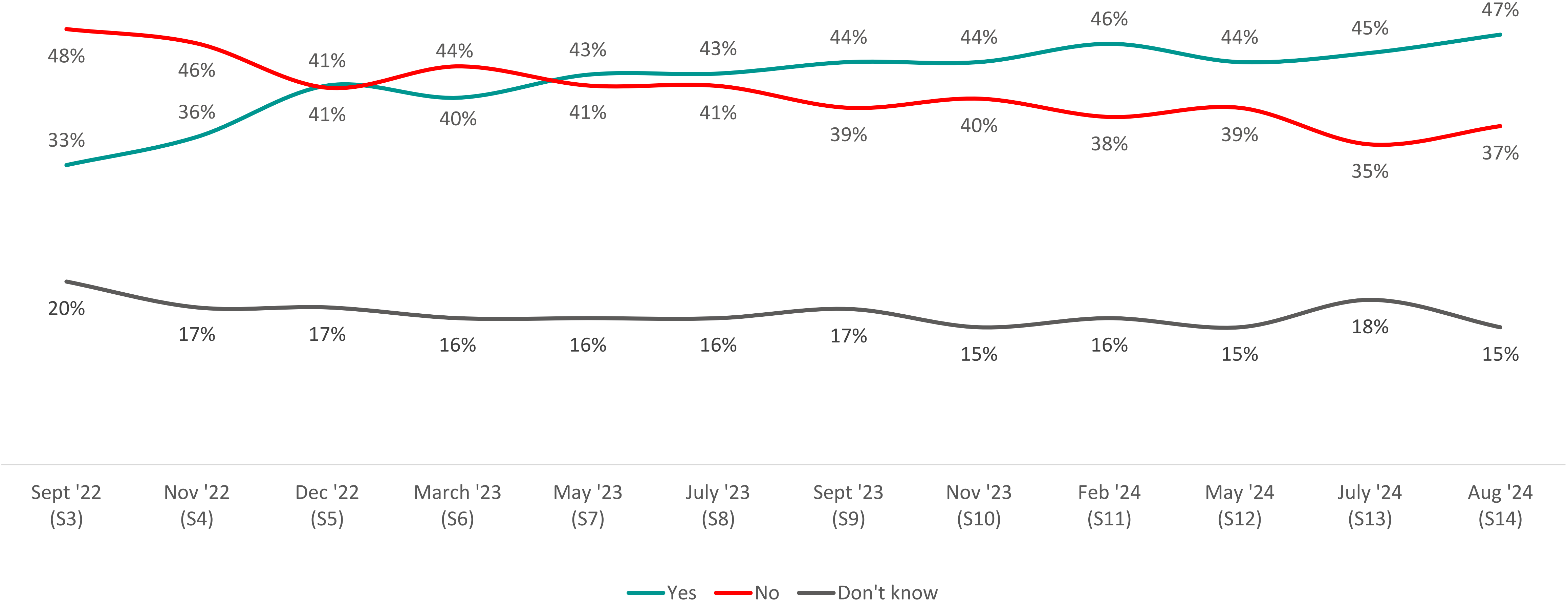


Significantly higher/lower than Survey 10

CL23. Have you tried to seek help with your debt through any of the following options? CL24. For what reasons have you decided not to seek advice for your debt problems?
Unweighted base: Survey 10, 340; Survey 14, 291 (All who struggle with debt); Survey 10, 149; Survey 14 (128) (All who struggle with debt and have not sought advice)

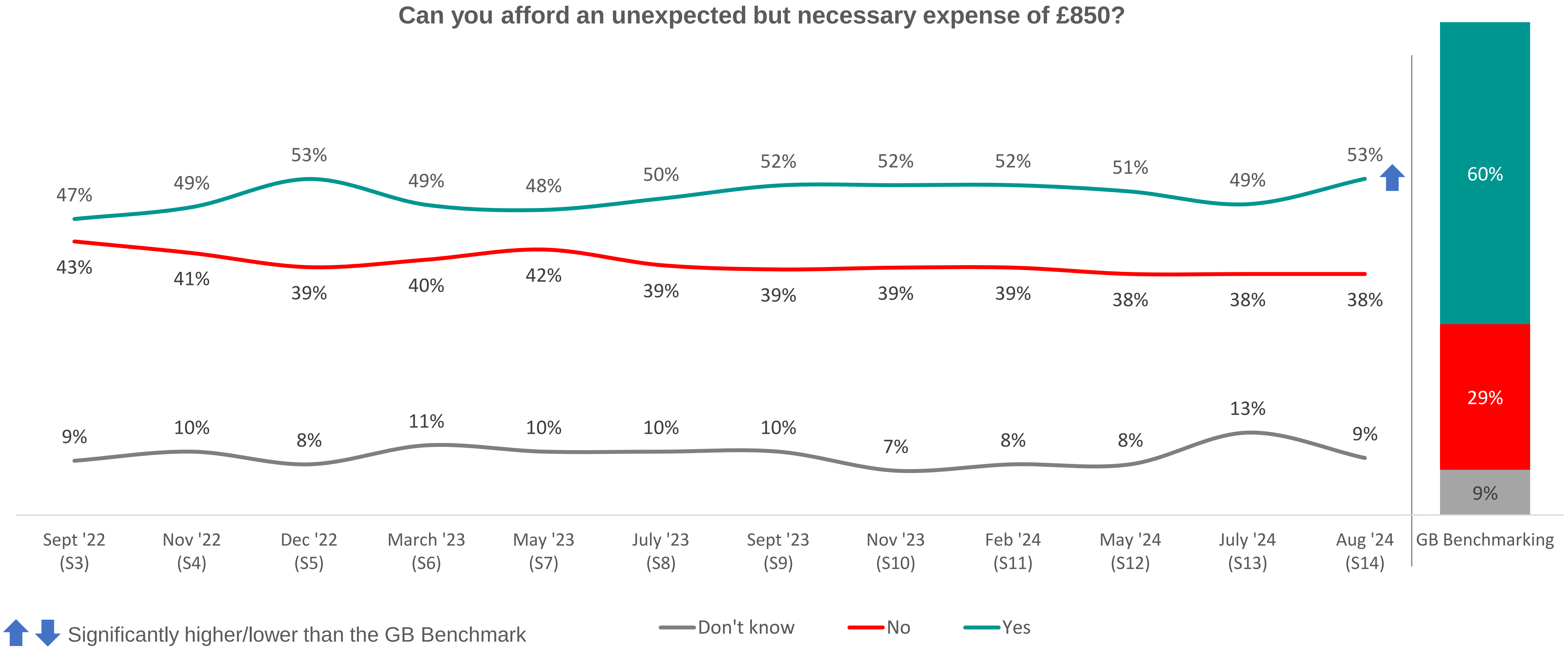
Over 2 in 5 (47%) think they will be able to save money over the next 12 months – the highest proportion reported since the question was asked. The proportion of those who do not think they will be able to save any money over the next 12 months has remained largely in line with July, though those who are unsure has dropped 3 percentage points

Will you be able to save money over the next 12 months?



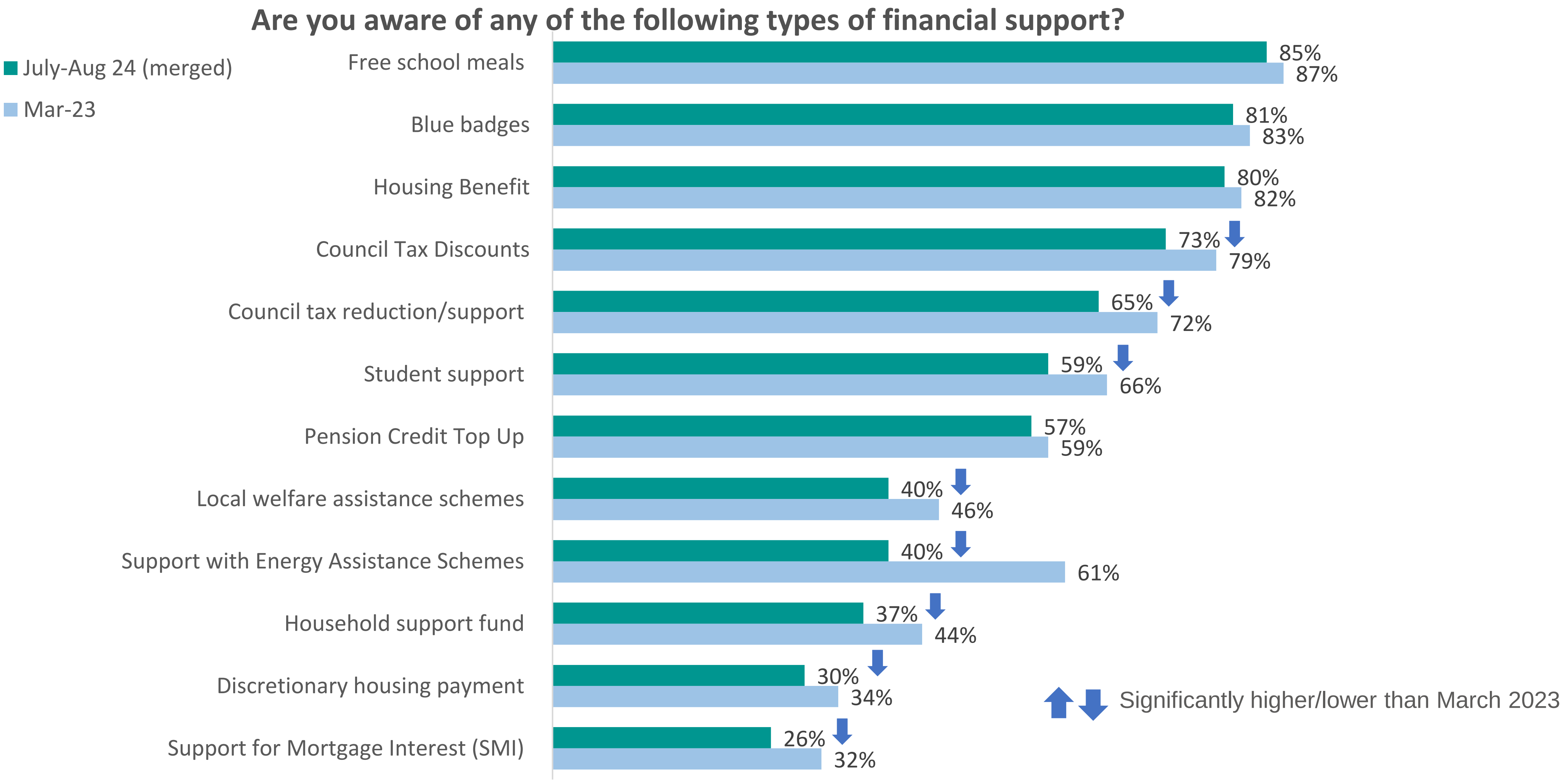
CL1. In view of the general economic situation, do you think you will be able to save any money in the next 12 months?
Unweighted base: S3, 1677; S4, 1636; S5, 1470; S6, 1767; S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482 (All respondents).

There has been a significant increase since July in the proportion of respondents who **could afford an unexpected but necessary expense of £850** – rising from 49% to 53%. However, Greater Manchester respondents continue to be significantly less likely than the GB average to be able to afford this expense



CL2. Could your household afford to pay an unexpected, but necessary, expense of £850? Unweighted base: Survey 3, 1677; Survey 4, 1636 Survey 5, 1470; Survey 6, 1767; Survey 7, 1488; Survey 8, 1612; Survey 9, 1560; Survey 10, 1546; Survey 11, 1460; Survey 12, 1551; Survey 13, 1540, Survey 14, 1482 (All respondents). ONS data, based on national fieldwork 7th August – 1st September 2024

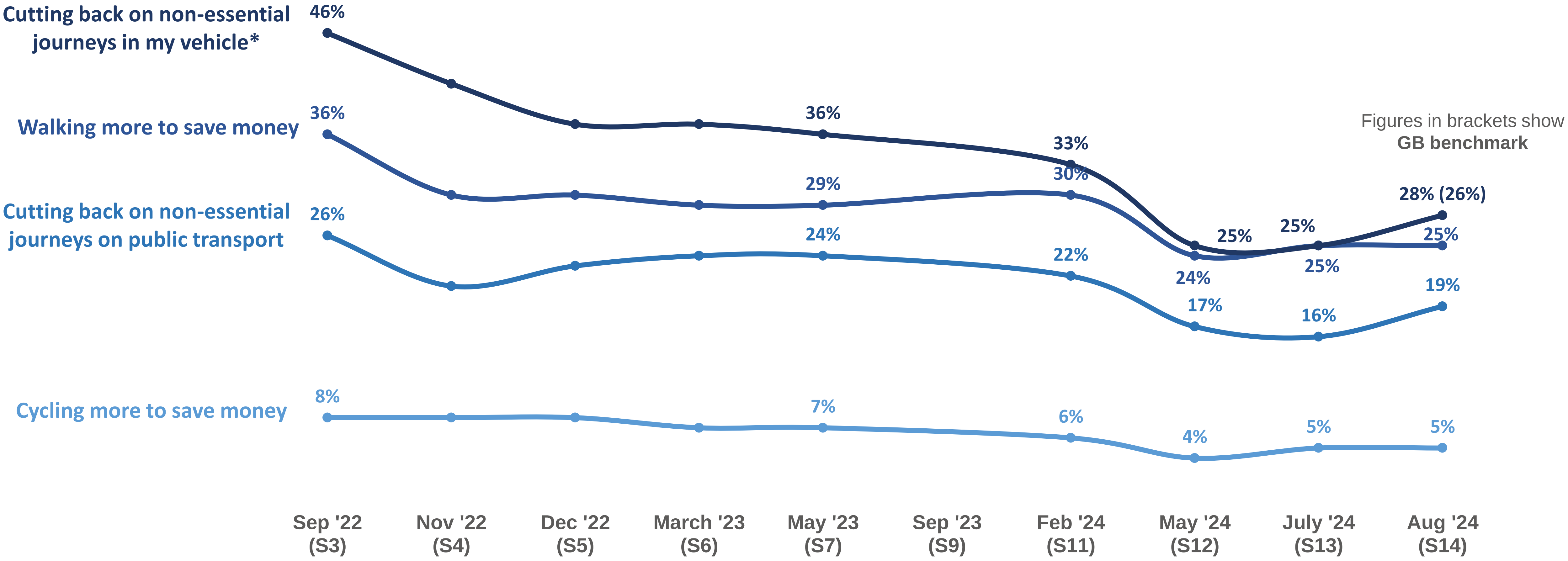
Fortunately, many forms of financial support are known by GM respondents. However, there have been some fluctuations since this question was last asked in March 2023. Awareness of council tax discounts and support, student support, local welfare assistance schemes and others forms of support has fallen significantly



CL21. The following question asks about income maximisation. Are you aware of any of the following types of financial support?
Base: Survey 6, 1767; Surveys 13+14, 3022 (All respondents)

As a result of cost-of-living increases, around 9 in 10 respondents said they continue to take actions to save money (88%). There has been no significant movement in actions taken as a result of cost-of-living increases since July 2024

Which of these, if any, are you doing because of the increases in the cost of living?



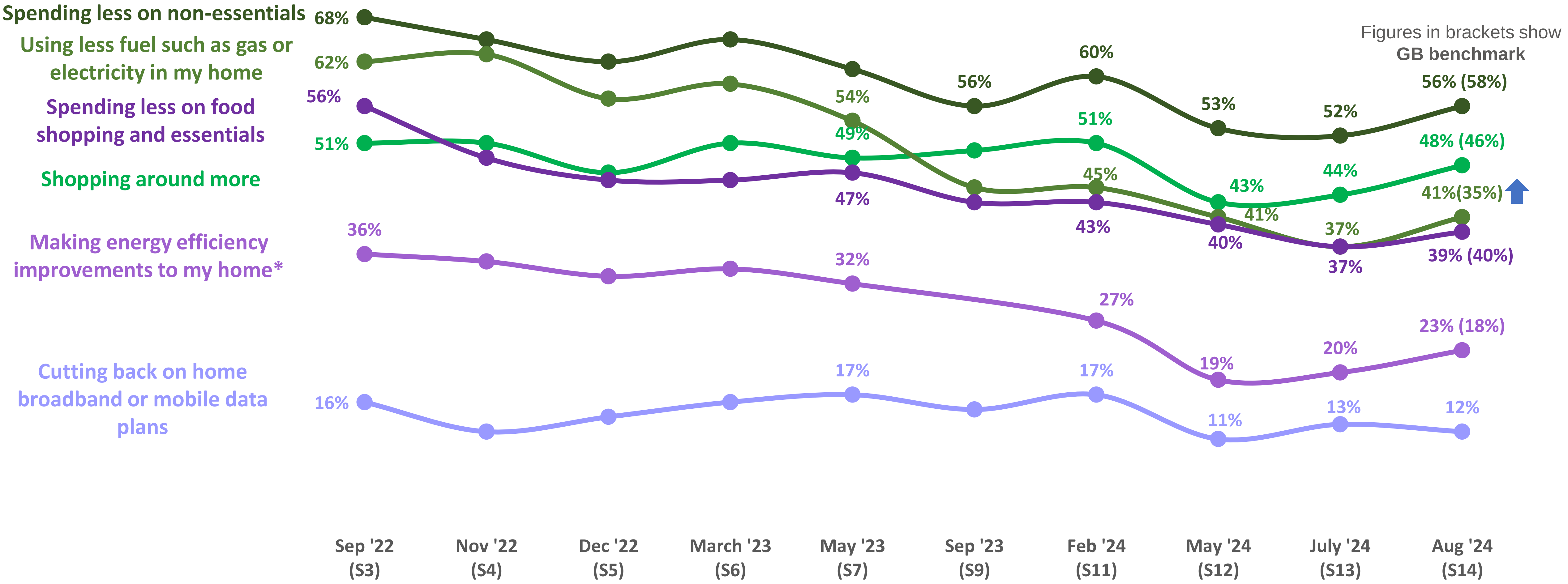
Data points shown wherever statement was included in fieldwork. Percentage figures included from May 2023 to provide a frame of reference - other specific % figures available on request

CL7. Which of these, if any, are you doing because of the increases in the cost of living? 1,482 (All respondents).
*Not asked in S9

GB benchmarking is not available for all statements. Statements which can be compared are shown in backets where available.

The only action with significant movement, is using less fuel in my home, which has increased significantly since July (from 37% to 41%). All other actions have remained largely in line with July

Which of these, if any, are you doing because of the increases in the cost of living?



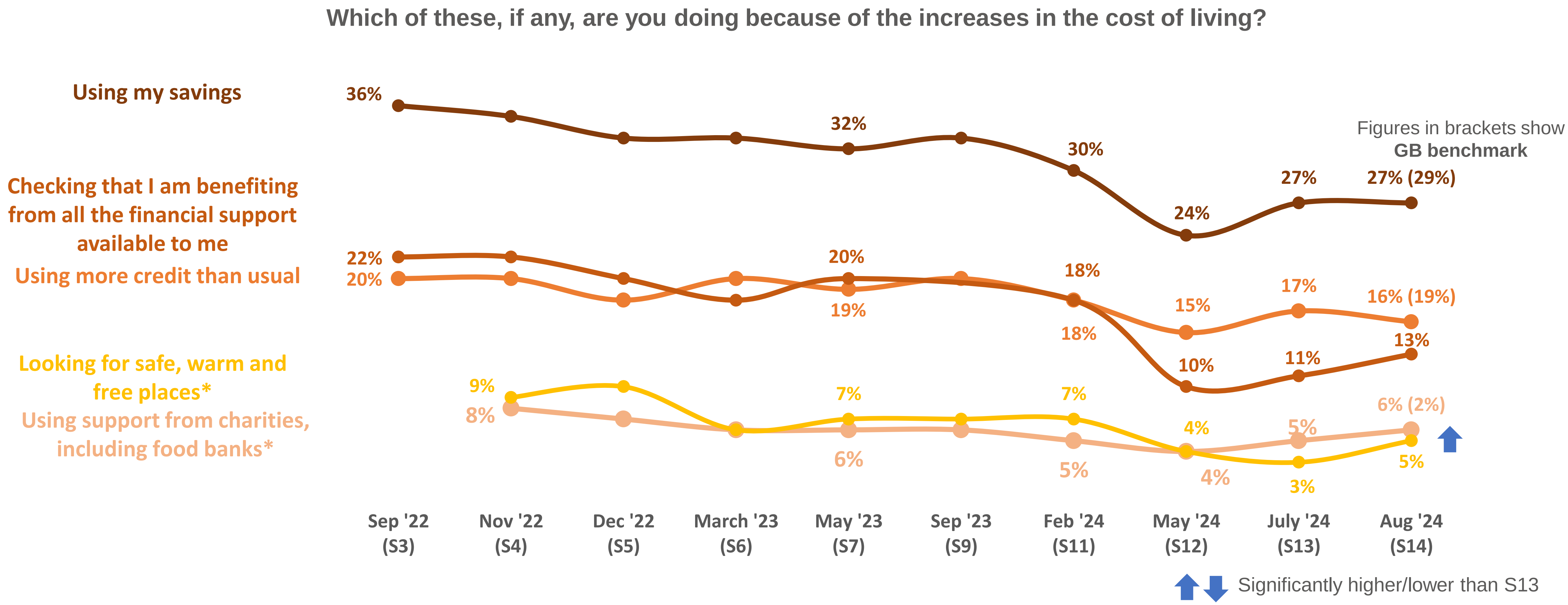
Data points shown wherever statement was included in fieldwork. Percentage figures included from May 2023 to provide a frame of reference - other specific % figures available on request

Significantly higher/lower than S13

CL7. Which of these, if any, are you doing because of the increases in the cost of living? 1,482 (All respondents).
*Not asked in S9

GB benchmarking is not available for all statements. Statements which can be compared are shown in backets where available.

1 in 4 Greater Manchester respondents are using their savings due to the increased cost of living – no change since July 2024. There has been a significant increase in those looking for safe, warm and free places since July – rising from 3% to 5%. Actions continue to generally be in line with the GB average



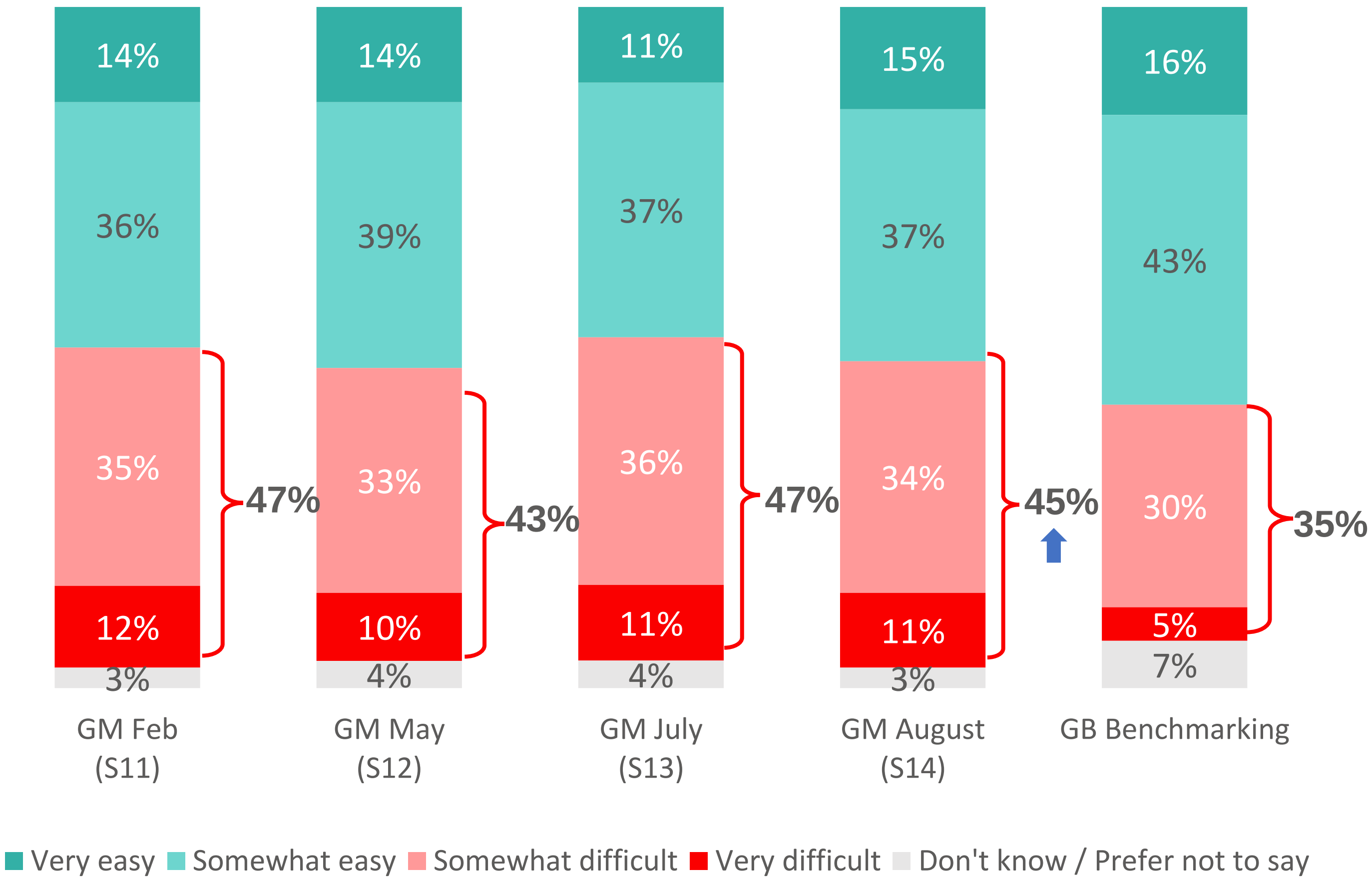
Data points shown wherever statement was included in fieldwork. Percentage figures included from May 2023 to provide a frame of reference - other specific % figures available on request

CL7. Which of these, if any, are you doing because of the increases in the cost of living? 1,482 (All respondents).
*Not asked in S3
**Not asked in S3

GB benchmarking is not available for all statements. Statements which can be compared are shown in backets where available.

45% of respondents say they have difficulty affording energy costs, slightly lower than July and remaining significantly higher than the Great Britain average. Those from within racially minoritised communities and renters remain more likely to be having these difficulties, as seen in previous waves

Ease of affording energy costs



Significantly higher/lower than the GB Benchmark

% who are significantly more likely to find it very/somewhat difficult to afford their energy costs compared to GM average (45%)*

Subgroups that continue to feature significantly:

- Those with a disability (61%) including those with a mobility disability (60%) or mental ill health (72%)
- Those whose first language is not English (57%)
- Those in Minority Ethnic Groups (55%)
- Those not in work due to ill health or disability (78%)
- Those renting their homes (59%) including from a Local Authority/ Council (66%), Housing Association / Trust (63%), or privately (53%)

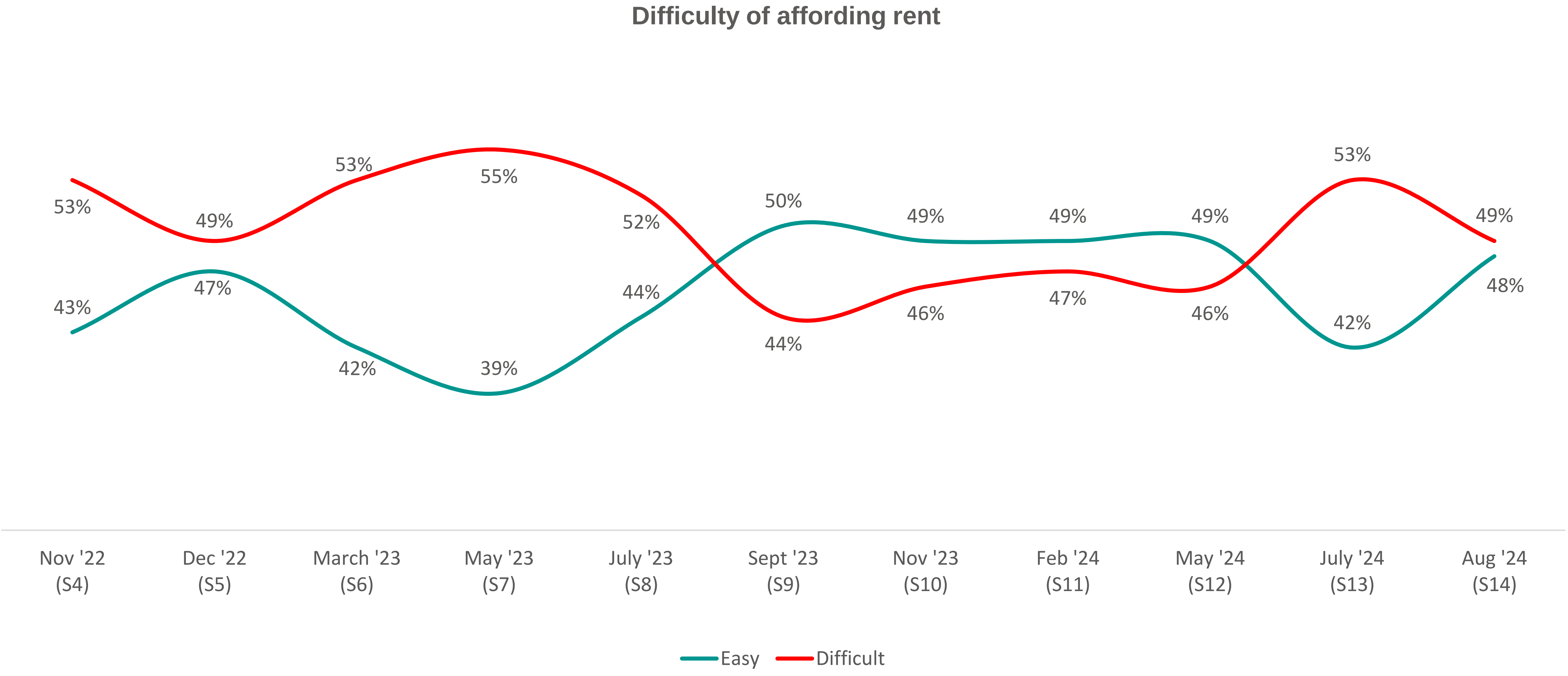
New subgroups found in analysis:

- Those with low levels of life satisfaction (70%)
- Those earning up to £15,599 (65%)
- Those living with 4+ people in their household (52%)
- Those with children (49%) and those whose children are in education (48%)
- Female respondents (49%)
- Those aged 16-24 (55%) or 25-44 (48%)
- Those finding it difficult to or are unable to manage their debt

*subgroup analysis uses S12-14 data.

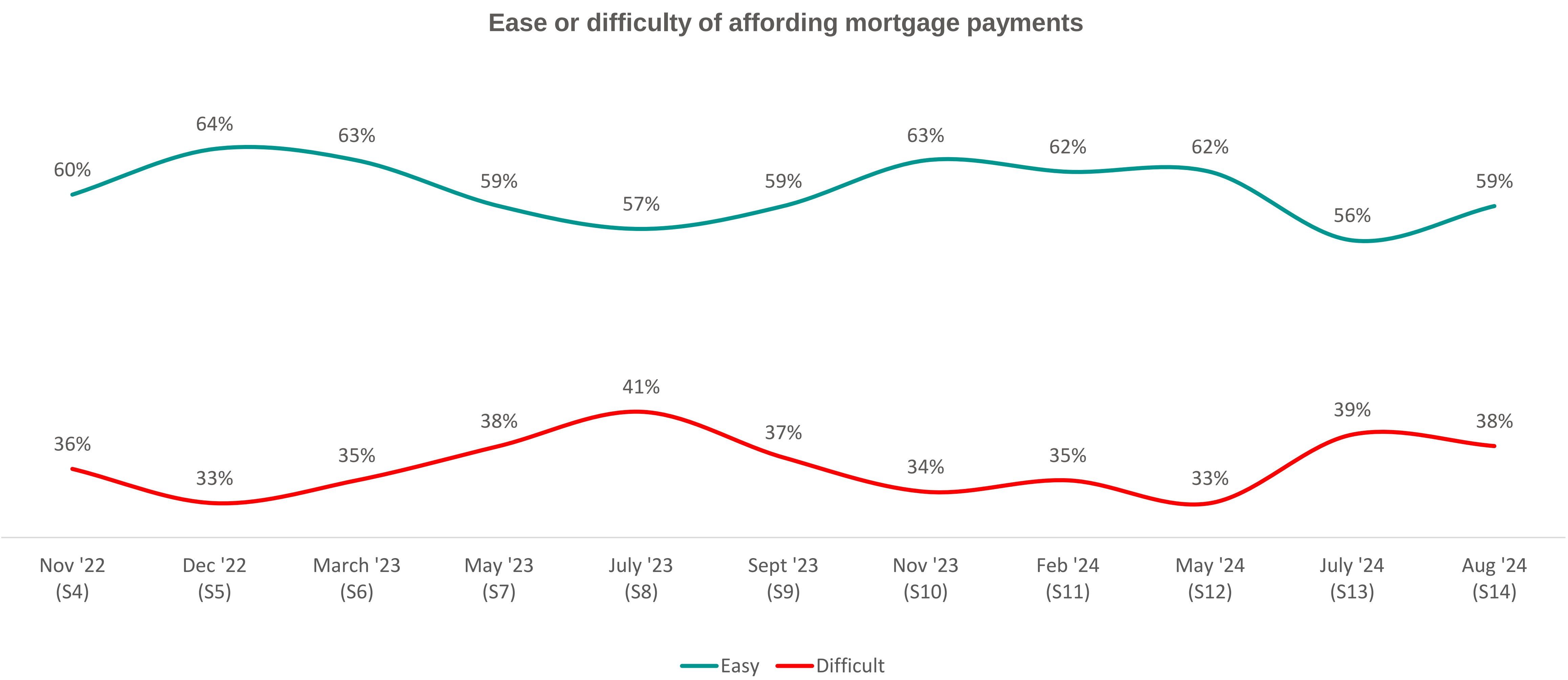
CL9. How easy or difficult is it to afford the following? Unweighted base: Survey 9, 1497; Survey 10, 1488; Survey 11, 1403; Survey 12, 1551; Survey 13, 1471; Survey 14, 1423 (All respondents who pay their energy costs). ONS data, based on national fieldwork 7th August 2024 – 1st September 2024

Long-term trends show volatility among renters in terms of ease of affording rent. From November 2022 until September 2023, renters finding it difficult to afford their rent outnumbered those without such difficulties. This situation reversed during the period September 2023 – May 2024, before a further increase in reported difficulty in the most recent two survey waves



CL9. How easy or difficult is it to afford your...
Unweighted base: S4, 438; S5, 368; S6, 405; S7, 388; S8, 436; S9, 377; S10, 412; S11, 369; S12, 488; S13, 497; S14, 411 (All renters).

There is more stability among those with **mortgage payments** – with a clearer narrative in terms of the balance between those reporting difficulties in affording mortgage payments, and those (the greater proportion) finding things easier



CL9. How easy or difficult is it to afford your...
Unweighted base: S4, 459; S5, 412; S6, 469; S7, 395; S8, 456; S9, 411; S10, 392; S11, 350; S12, 409; S13, 383; S14, 407 (All who do not own their home outright).

Those more likely to find it difficult to afford mortgage or rent payments include those with long term health conditions and those with low household incomes

% who are significantly more likely to find it difficult to afford mortgage payments compared to the GM average (37%):

Demographics:
- Those aged 16-24 (52%)
- Those in Minority Ethnic Groups (50%), including Asian or Asian British respondents (55%)
- Those who are not heterosexual (46%)
- Parents of children under 5 (43%)

Individual and/or family circumstance:
- Those earning below the Real Living Wage (57%)
- Those who feel they are treated unfairly in society (56%)
- Those with low levels of life satisfaction (54%)
- Those who have had to borrow money or use more credit in the last month (54%)
- Those with low levels of happiness (54%)
- Those with high levels of anxiety (47%)
- Those who would not recommend their local area (45%)
- Those doing something because of the increases in the cost of living (40%)

% who are significantly more likely to find it difficult to afford rent compared to the GM average (49%):

Demographics:
- Those in Minority Ethnic Groups (56%), including Asian or Asian British respondents (60%)
- Bisexual respondents (61%)
- Those with mental ill health (57%)
- Those with children aged 16-17yos (61%), or 19-25 (68%)
- Those living in Rochdale (62%)

Individual and/or family circumstance:
- Those earning below the Real Living Wage (55%)
- Those who feel they are treated unfairly by society (63%)
- Those who do not feel their life is worthwhile (62%)
- Those with low levels of life satisfaction (61%)
- Those with 4+ people living in the household (60%)
- Those who do not feel able to save any money in the next 12 months (60%)
- Those with a part time job (57%)
- Those who disagree they are able to look after their own health (64%)
- Those who find it difficult or unable to manage their current levels of debt (76%)
- Those seeking help with their debt (71%)

Subgroup analysis uses merged data from S12-14 combined

CL9. How easy or difficult is it to afford your...
Unweighted base: Greater Manchester Residents Surveys 12-14, 1199 (All with a mortgage); 1396 (All renters)

Digital inclusion

Findings from the May - August merged into groups of three waves (trio of face-to-face samples)

Overview and context	**page 68**
Digital inclusion key findings	**page 69**
Digital inclusion detailed findings	**pages 70-75**

Unweighted base: 741 (Face to face respondents S12+S13+S14)

Digital inclusion – context

Sampling

Digital inclusion questions have been included in the survey since Spring 2022 (though the methodology / approach was amended, first in September 2022, then again in May 2024).

The sampling approach covers all ages and provides a sample of around 250 responses per survey (excludes online respondents*). The reporting approach places a particular focus on over 75 year olds, under 25 year olds, and disabled people – as known high-risk groups.

Merged Findings

For this report, we have merged findings for survey 14 (September 2024) with those from survey 13 (July 2024) and survey 12 (May 2024), to provide a robust sample size for sub-group analysis. All three surveys have used a face-to-face interview approach.

Headlines reported are based on the most recent three waves combined, with careful analysis of individual differences between waves where appropriate.

** Base sizes: Survey 12 (251), Survey 13 (250), Survey 14 (240)*

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*Although early waves included digital inclusion questions for all survey respondents, the decision was taken to only ask digital inclusion questions in telephone or face to face samples (and not of respondents taking part in the survey online, who are therefore less likely to be digitally excluded than the population as a whole).

Digital inclusion – Key findings

EXPERIENCE OF DIGITAL EXCLUSION (survey 12+13+14 combined data*)

- Since May, over a third (37%) of respondents have that their household experiences some form of digital exclusion. This is a higher proportion than was seen over the course of surveys 9-11 (33%). Interviews are now conducted face-to-face, whereas previously they were telephone based.
- Just less than a fifth (18%) of Greater Manchester households experienced a single aspect of digital exclusion. However, a similar proportion (19%) have experienced all 5 aspects of digital exclusion (see notes** for a reminder on the five aspects covered in the survey)
- There have been increases in those aged 16-24, 75+ and disabled respondents reporting any form of digital exclusion, when comparing face-to-face results since May 2024 with the previous baseline informed by telephone interviews:
    - 77% of those aged 75+ now say they have experienced one or more aspect of digital exclusion, compared to 60% in surveys 9-11
    - 62% of disabled respondents report experiencing at least one form of digital exclusion, rising from 45% in surveys 9-11
    - 33% of 16–24-year-olds now say they have experienced one or more aspect of digital exclusion, higher than the 23% reported in surveys 9-11

CONFIDENCE USING DIGITAL SERVICES (survey 12+13+14 combined data)

- 22% of respondents say either they (18%) or someone in their household (13%) is not confident using digital services online – in line with July's results.
- Using subgroup analysis from S12-14, this proportion is also 71% among older cohorts aged 75+ and 42% amongst disabled respondents (all ages)

** Base sizes: Survey 12 (251), Survey 13 (250), Survey 14 (240)*

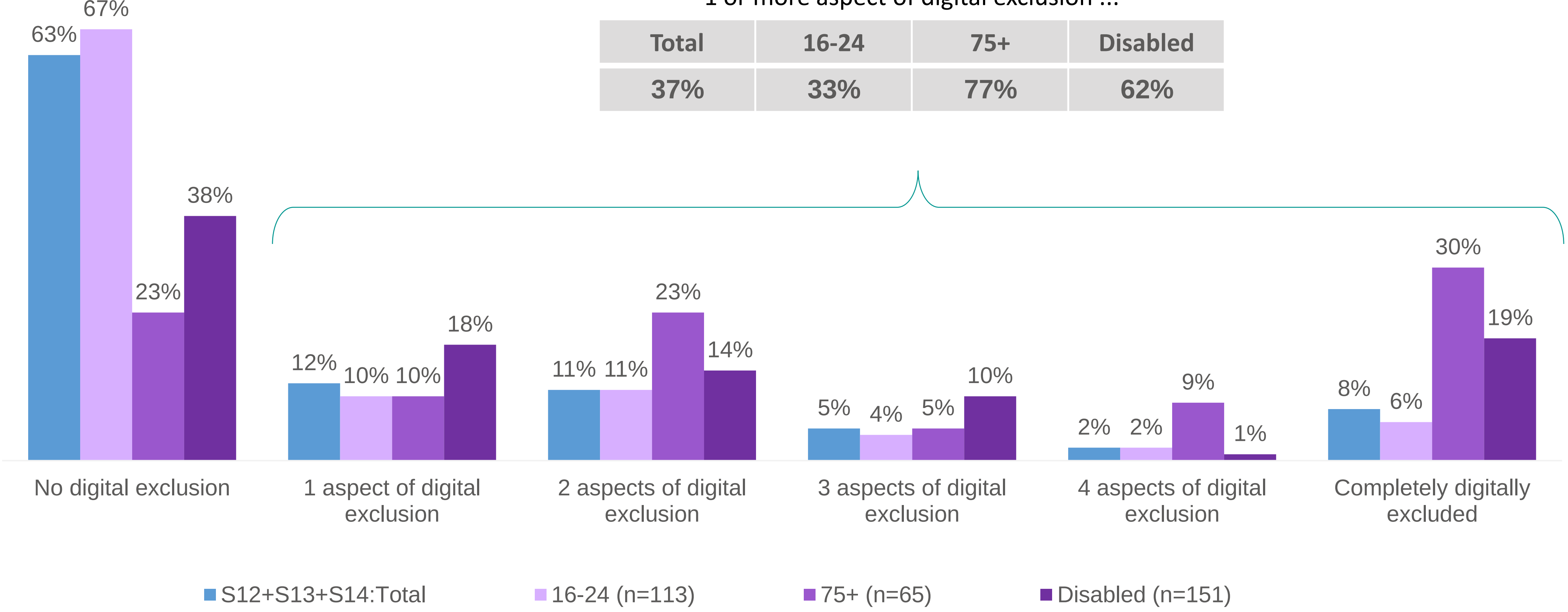
***The five aspects of digital exclusion relate to: (I) consistent and reliable access to an internet connection at home; (II) to devices that allow access to the internet; (III) affording access to the internet; (IV) skills needed to access and use digital services online; (IV) support needed to access and use digital services online*

Over a third of respondents report experience of **at least one aspect of digital exclusion in their household**, a figure that rises among older and disabled respondents

Number of aspects of digital exclusion experienced (May - August 2024)

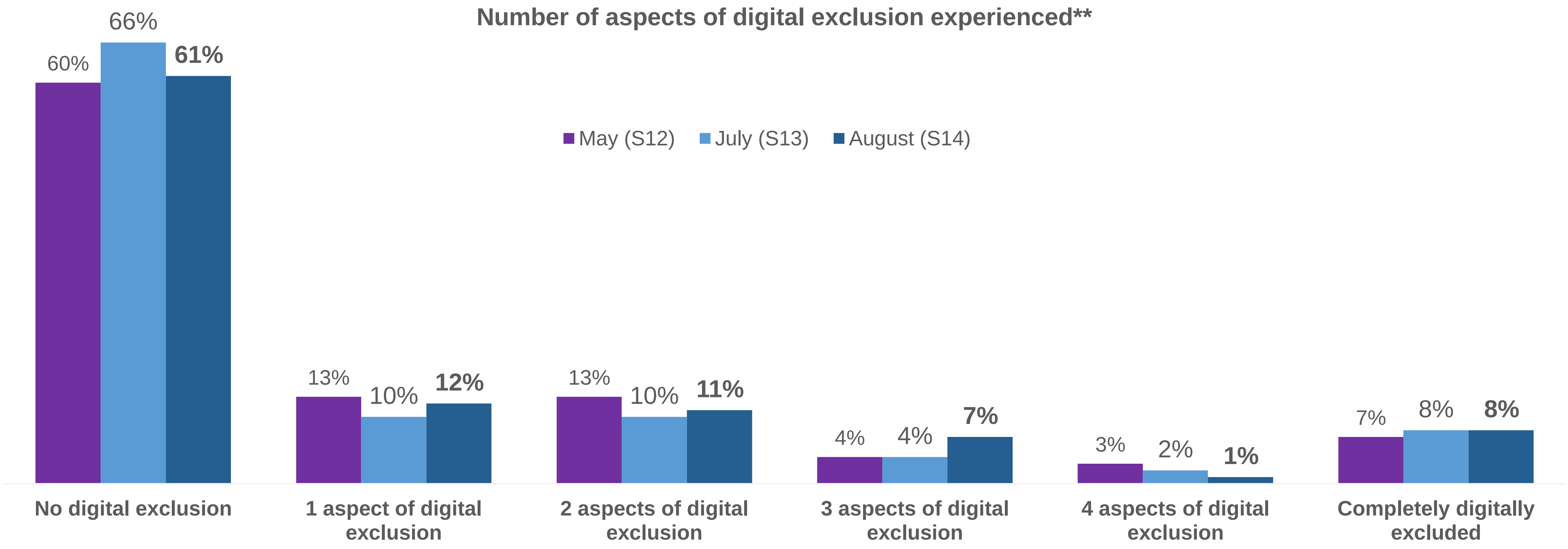
1 or more aspect of digital exclusion ...

Total	16-24	75+	Disabled
37%	33%	77%	62%



DI11. How often…? Unweighted base: 741 (Telephone / Face to face respondents) Prefer not to say not shown. Question in was asked as a grid, between “you” and “others in your household”. The data on this slide shows the percentages of households where there is someone (either you or others) who has said they are digitally excluded. *Aspects of digital exclusion = consistent and reliable access to an internet connection at home; to devices that allow access to the internet; affording access to the internet; skills needed to access and use digital services online; support needed to access and use digital services online

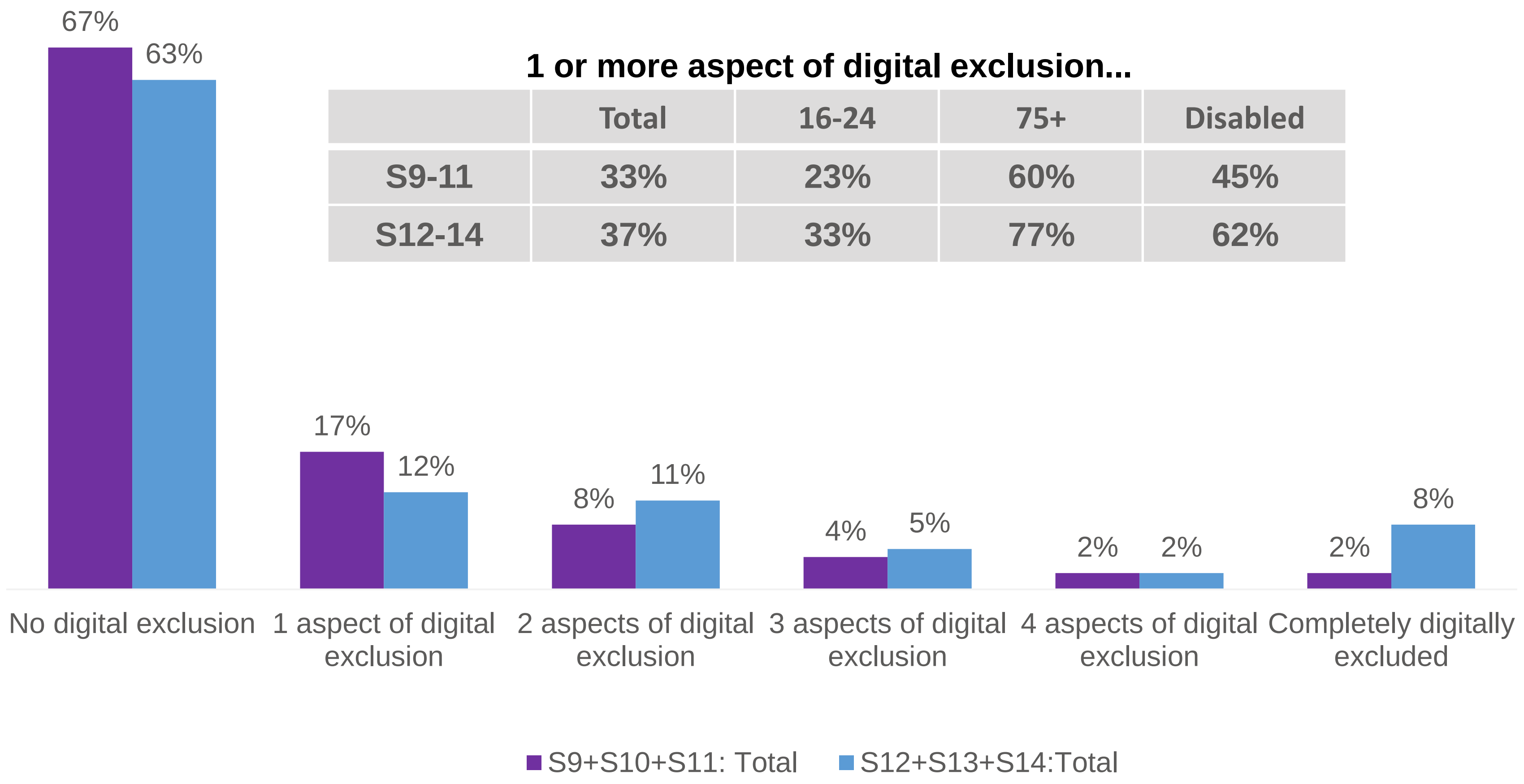
Wave-on-wave trends: August shows a decrease in those who are not digitally excluded – a 5pp drop, bringing figures back in line with May's results



Unweighted base: S12+S13+S14, 740; Survey 12, 251; Survey 13, 250; Survey 14, 240 (Face to Face Respondents) **Aspects of digital exclusion = consistent and reliable access to an internet connection at home; to devices that allow access to the internet; affording access to the internet; skills needed to access and use digital services online; support needed to access and use digital services online

Trend over time: It appears that the proportion of respondents experiencing any form of digital exclusion has increased, however, methodological change is likely to be impacting this data*. Respondents aged 75+ or those with a disability report substantially higher levels of digital exclusion, as seen in previous waves also

Number of aspects of digital exclusion experienced
Second half of 2023 vs. First half of 2024



1 or more aspect of digital exclusion...

	Total	16-24	75+	Disabled
S9-11	33%	23%	60%	45%
S12-14	37%	33%	77%	62%

***Change in Methodology**

Survey 14-12 utilise a face-to-face methodology, while survey 11-9 use a telephone approach.

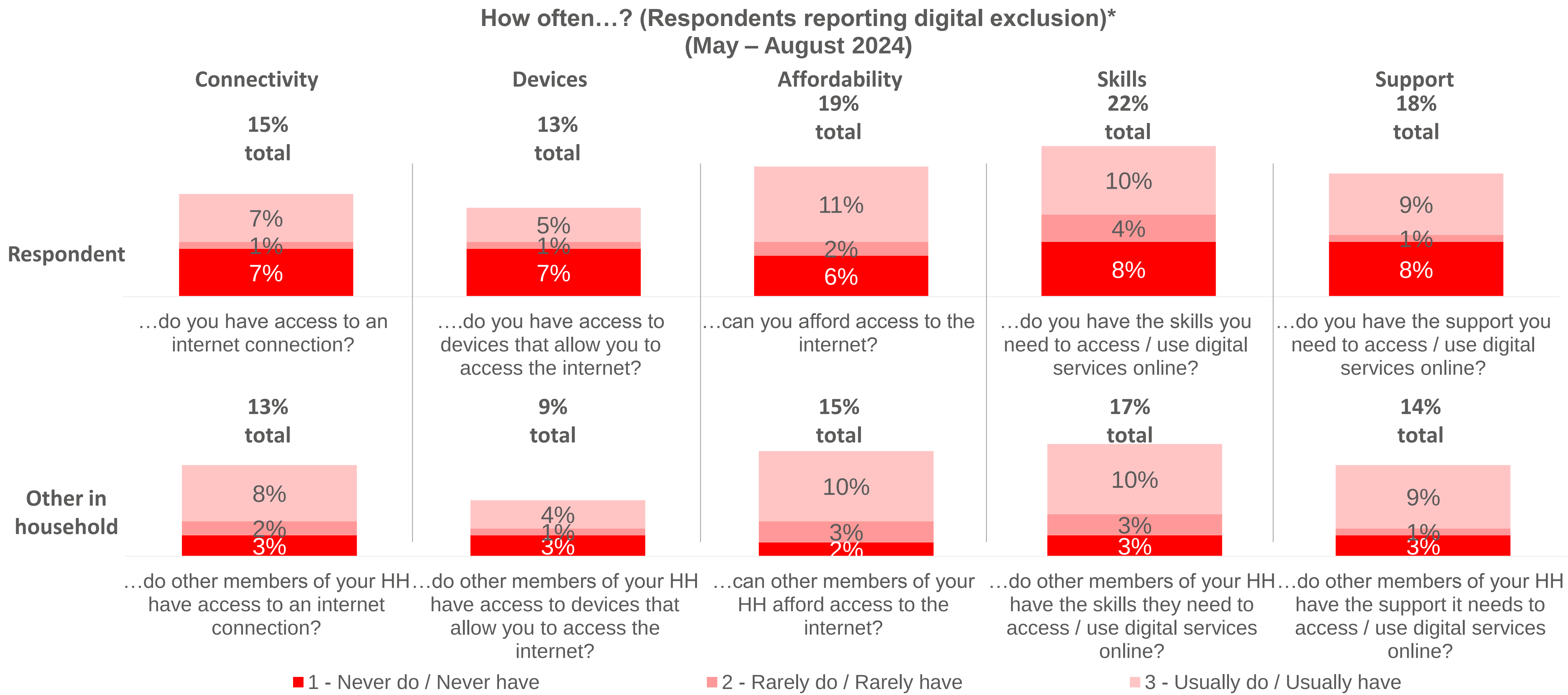
Changes in who we can talk to between the two approaches have impacted the results on this slide.

This is because those who are recruited to take part in telephone research are often recruited through online methods or live in homes which are generally more likely to be connected to the internet and phoneline in combination. Both factors reduce the chance that they will be digitally excluded.

While this impacts the trackability of these results, changing approach allows us to provide a truer understanding of the extent of digital exclusion in Greater Manchester.

DI11. How often…? Unweighted base: S9-11 (748), S12-14 (741) (Telephone respondents / Face to Face respondents) Prefer not to say not shown. Question in S6 onwards was asked as a grid, between "you" and "others in your household". The data on this slide shows the percentages of households where there is someone (either you or others) who has said they are digitally excluded. Aspects of digital exclusion = consistent and reliable access to an internet connection at home; to devices that allow access to the internet; affording access to the internet; skills needed to access and use digital services online; support needed to access and use digital services online

Where respondents are experiencing digital exclusion, this continues to be driven most by those saying a lack of skills proves a barrier to access digital online services, along with affordability



DI_11. How often…? Unweighted base: 741; Survey 12, 251; Survey 13, 250; Survey S14, 240 (Face to face respondents) *Prefer not to say, 4, and 5 (Mostly do / have and Always do / have) not shown.

Those aged 75+ and disabled respondents continue consistently to be far more likely to lack access to enable "all" or "most" of the time, or the skills and support to do so. This is consistent with previous surveys

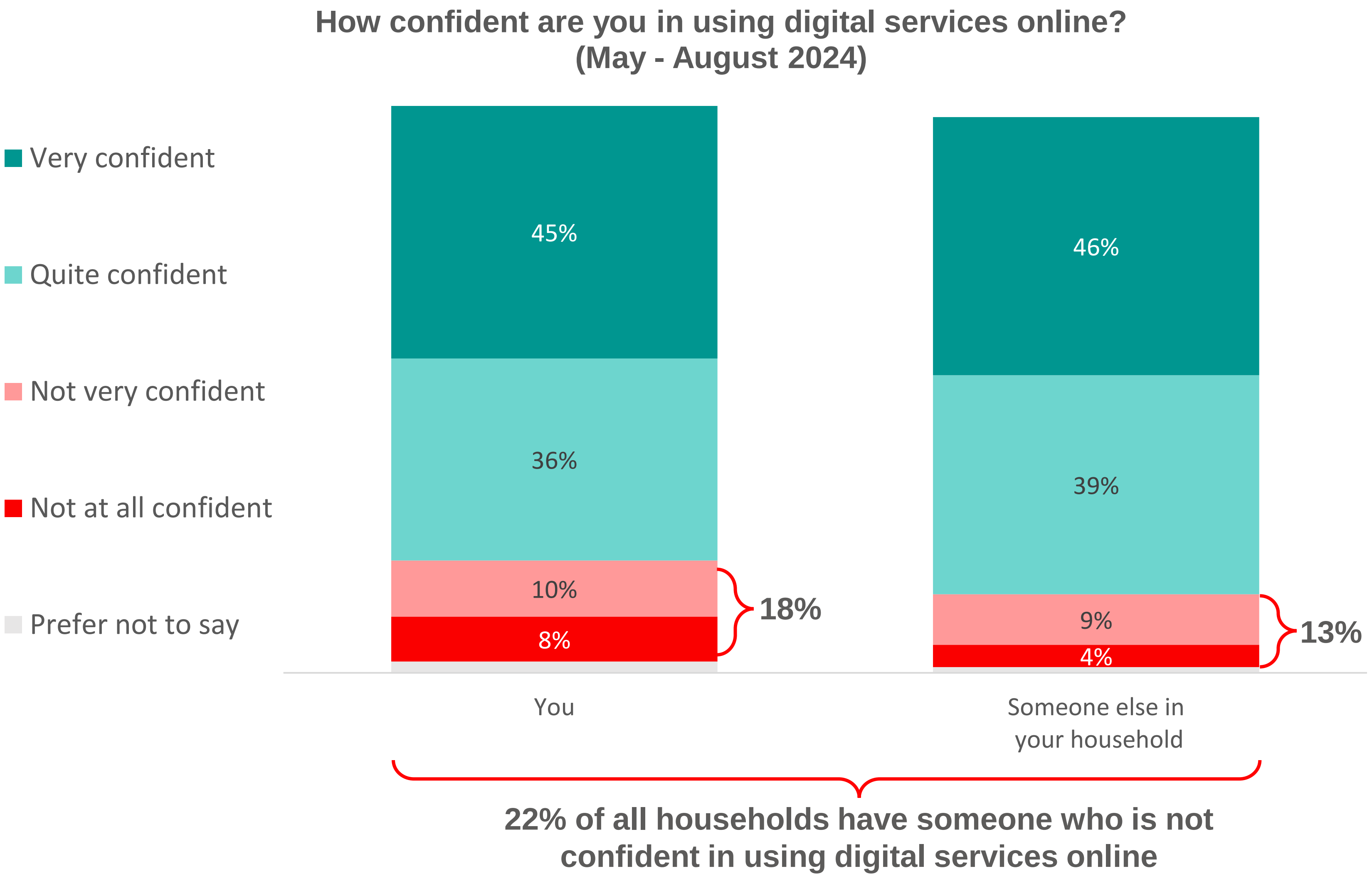
How often do you/do others in your household…?
(Showing households without the access/skills to get online all/most of the time)
May – August 2024

	Total	Aged 16-24 (n=113)	Aged 75+ (n=65)	Disabled respondents (n=151)
…have consistent and reliable access to an internet connection at home?	15%	11%	36% ↑	25% ↑
…have consistent and reliable access to devices that allow access to the internet and use digital services online?	12%	10%	44% ↑	24% ↑
…can afford access to the internet?	18%	17%	43% ↑	35% ↑
…have the skills they need to access and use digital services online?	17%	11% ↓	65% ↑	35% ↑
…have support needed to access and use digital services online?	15%	11%	53% ↑	28% ↑

↑↓ Significantly higher/lower than total

DI_11. How often…? Unweighted base: 741; Survey 12, 251; Survey 13, 250; Survey 14, 240 (Telephone / face to face respondents)

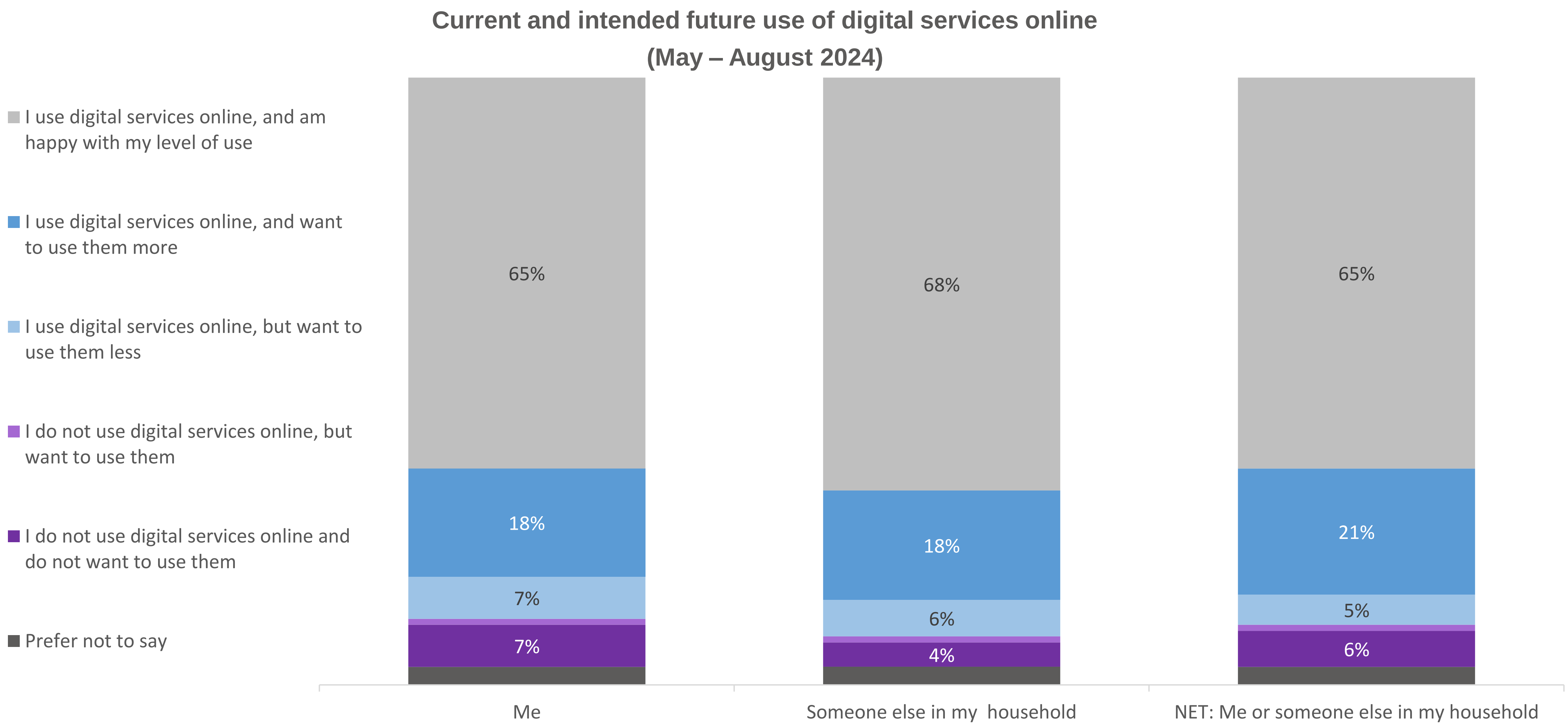
Approaching one-fifth of respondents say they are not confident using digital services online, with just over 1 in 10 saying others in their household are not confident". Those aged 65+ and living alone are more likely to not be confident



Respondents or someone in their household in the telephone sample more likely to be not very/not at all confident in using digital services online (vs. 22% GM average):
Demographics: • Those aged 75+ (71%) • Those aged 65+ and living alone (64%) • Retired respondents (54%) • Those earning below the Real Living Wage (45%) • Disabled respondents (42%) including those with a mobility disability (56%) • Those with caring responsibilities (33%)

DI10. Overall, how confident is your household in using the digital services online that it needs and wants?
Unweighted base: 741; Survey 12, 251; Survey 13, 250; Survey S14, 240 (Face to face respondents)

1 in 5 (20%) of households use digital services and want to use them more. Just 1% of people who do not use digital services online want to be able to do so – in line with previous surveys



DI8. How would you describe your current and future intended use of digital services online?
Unweighted base: 741; Survey 12, 251; Survey 13, 250; Survey S14, 240 (Face to face respondents)

Appendix

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More detail on changes in survey methodology

The table below details the methodology used in previous and future waves – matching up the sample elements that are comparable.

Surveys 1-11	Surveys 12 onwards
Online panels (n=750)	Online panels (n=750)
River sampling (n=500)	Online rapid sampling (n=500)
Telephone sampling (n=250)	Face-to-face sampling (n=250)

The renewal of the Residents' Survey for another six waves provided an opportunity to update our methodology to improve robustness.

Changing from river sampling to online rapid sampling means we are better able to target underrepresented digital users and extend our reach outside those who are typically found on panels. Previously, we were not able to set hard quotas on river sampling, however by partnering with Find Out Now on this methodological change, we are now able to set hard quotas and control the sample makeup more accurately. Alongside enjoying better control and a more extensive scope over residents, sample analysis confirms online rapid sampling has the same data quality river sampling offers.

Changing from telephone to face-to-face sampling ensures improved delivery of an interviewer-led offline approach. This change allows for a higher degree of control over fieldwork progress, whilst still ensuring traditional offline groups are reached, which is particularly important for sections such as digital inclusion. While our sampling approach, alongside the interviewer-led interviewing, is comparable with a telephone approach, changes in who we are able to talk to has impacted some results, particularly in the Digital Inclusion section of this report. This is because those who are recruited to take part in telephone research are often recruited through online methods, and as such this reduces the chance that they will be digitally excluded. Therefore, while this impacts the trackability of levels of digital inclusion, by changing approach allows us to provide a truer understanding of the extent to which digital exclusion impacts on the residents of Greater Manchester. BMG is undertaking further analysis on the extent of this mode impact to allow us to directly compare the two datasets.

Overall, the changes to the sampling approach were made to upgrade our approach while still ensuring the quality of data produced.

Sample information

Survey	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Fieldwork start	9 Feb 22	25 Mar 22	1 Sep 22	20 Oct 22	7 Dec 22	2 Mar 23	5 May 23	26 June 23	4 Sept 23	13 Nov 23	29 Jan 24	13 May 24	8 July 24	19 Aug 24
Fieldwork end	25 Feb 22	11 April 22	24 Sep 22	3 Nov 22	21 Dec 22	14 Mar 23	22 May 23	10 July 23	18 Sept 23	29 Nov 23	13 Feb 24	25 May 24	19 July 24	2 Sept 24
Report publication	Mar 22	Apr 22	Sep 2022	Nov 2022	Jan 2023	Apr 2023	June 2023	July 2023	Sept 2023	Dec 2023	Mar 2024	June 2024	Aug 2024	Sept 24
Total respondents	1385	1467	1677	1636	1470	1767	1488	1612	1560	1546	1460	1551	1540	1482
Web respondents	762 (55%)	794 (54%)	785 (47%)	791 (48%)	721 (49%)	765 (43%)	789 (53%)	766 (48%)	755 (48%)	754 (49%)	766 (52%)	775 (50%)	770 (50%)	775 (52%)
F2F (previously phone) respondents	250 (18%)	250 (17%)	235 (14%)	270 (17%)	250 (17%)	250 (14%)	251 (17%)	250 (16%)	248 (16%)	250 (16%)	259 (18%)	251 (16%)	250 (16%)	241 (16%)
Online rapid (previously river) sampling	373 (27%)	423 (29%)	657 (39%)	575 (35%)	499 (33%)	752 (43%)	448 (30%)	596 (37%)	557 (36%)	542 (35%)	435 (30%)	525 (34%)	517 (34%)	463 (31%)

Key demographics (before weighting applied)

Survey	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Male	597	593	739	666	686	782	657	701	680	664	673	678	657	598
Female	761	843	906	970	784	964	831	877	852	840	766	843	856	866
16-24	113	96	123	170	111	114	133	146	123	139	150	138	139	156
25-44	413	421	455	503	440	483	487	457	412	460	405	531	543	451
45-64	484	538	525	565	570	644	506	624	607	506	489	546	566	572
65+	375	412	574	398	349	526	362	385	418	441	416	336	292	303
White	1201	1314	1503	1405	1297	1572	1278	1390	1358	1319	1253	1251	1281	1259
Within racially minoritised communities	166	137	159	208	173	181	194	197	194	218	195	218	246	216

Significance Testing and statistical difference – technical note

- Where relevant, differences in findings for specific demographic and other population characteristics compared to the Greater Manchester average are reported. These differences are only highlighted where they are significantly different statistically (at the 95% level of confidence) compared with the ‘total’ figures (i.e. the Greater Manchester average). Significant differences are shown in charts and tables with the use of up and down arrows.

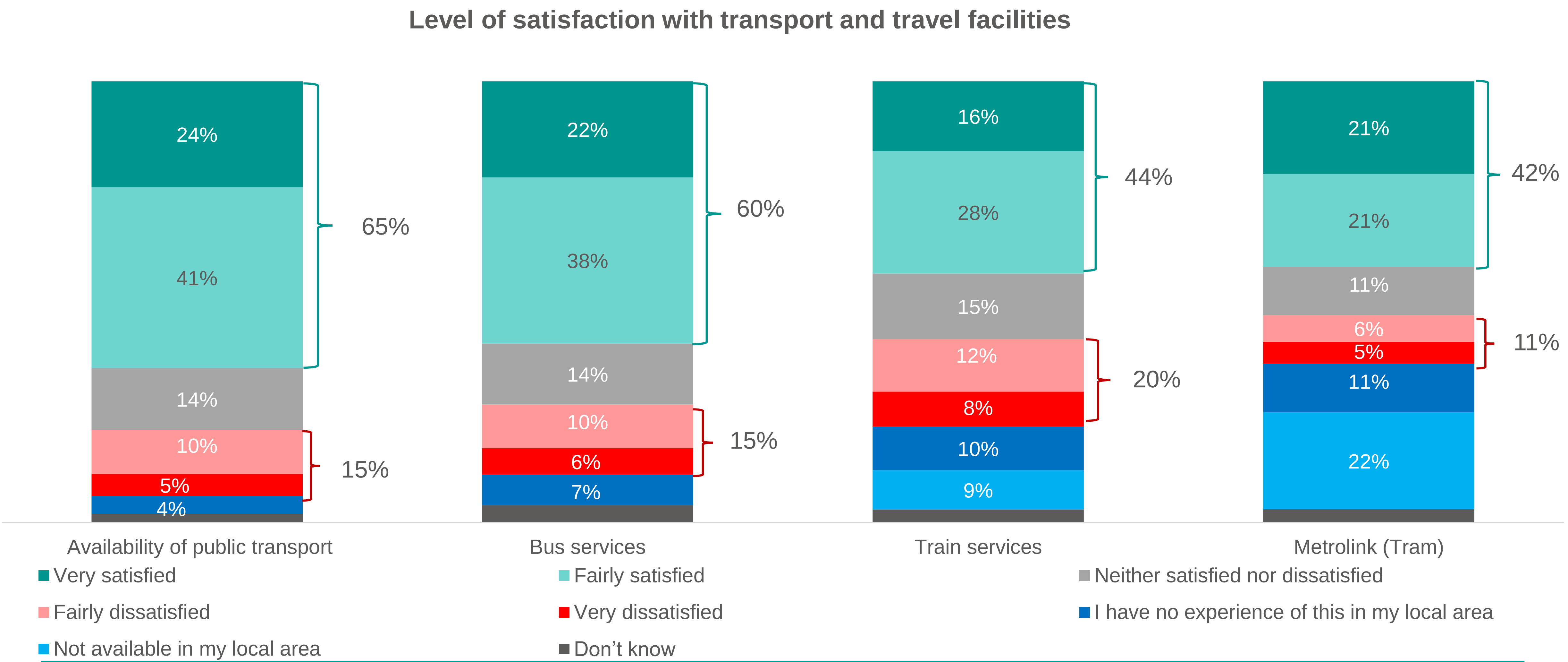
- The confidence interval is an estimate of the amount of uncertainty associated with a sample. A 95% confidence interval is where you can be 95% certain a difference is statistically significant.

- The sample size included in each wave of the survey has differed (see the previous slide for details on the size).

- At 95% confidence this means the size of the sample affects the percentage difference required for significant changes. The bigger the sample size, the smaller the difference required to be statistically different.

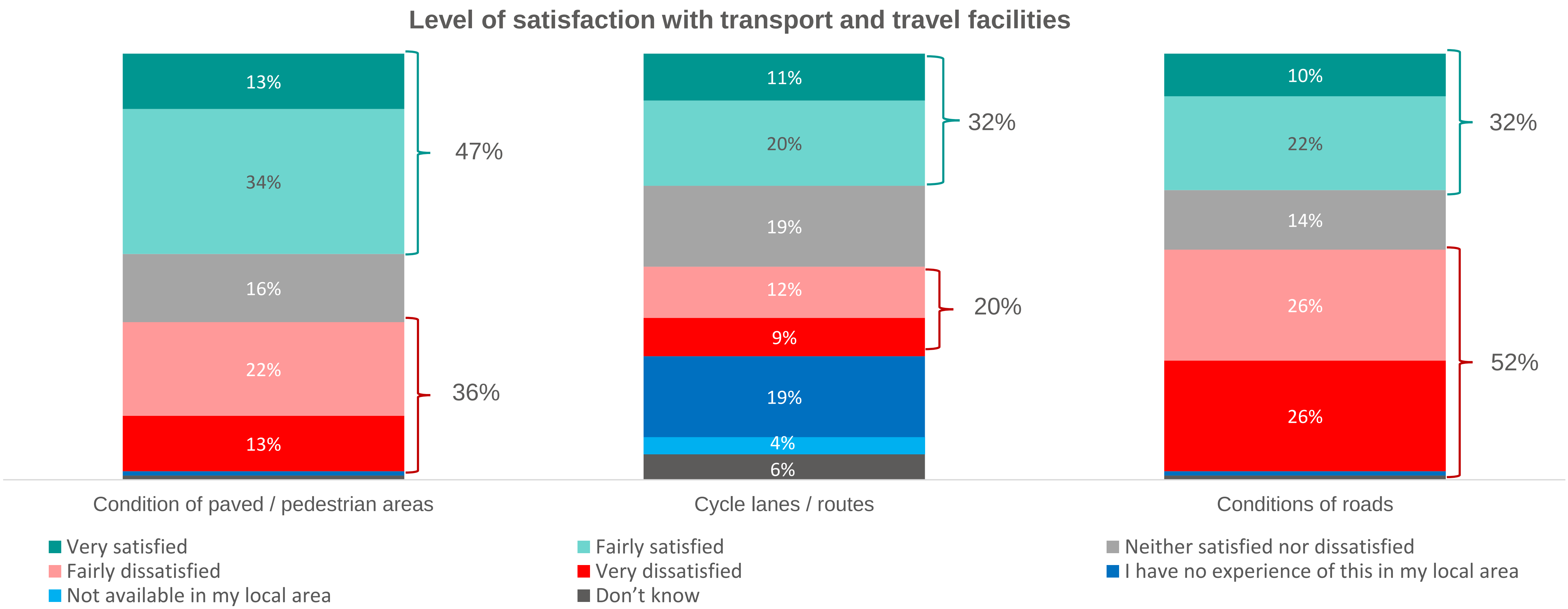
- The percentage difference required is also impacted by how many or few people are providing a given answer. For example, a percentage nearer to 10% or 90% provides greater certainty than a value of 50%, and therefore requires a smaller difference to be significant. As such, please remember that the difference required will be lower when dealing with percentages higher or lower than 50%.

Respondents continue to be broadly satisfied with transport and travel facilities. The lowest level of satisfaction was reported for the Metrolink, at 42%, though this is offset by high levels of respondents saying this is not available in their local area



LA7. Thinking about where you live, how satisfied or dissatisfied are you with your experience of the following in your local area?
Unweighted base: All respondents Survey 13, 1540; Survey 14, 1842

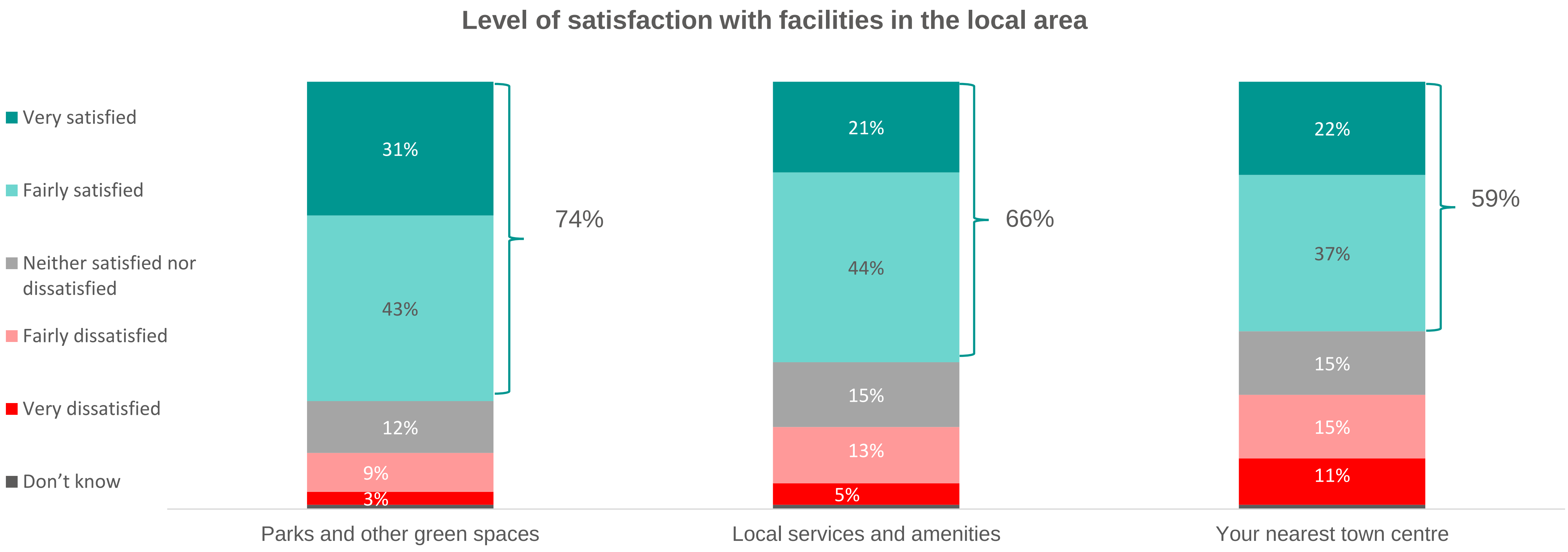
Dissatisfaction with the condition of the roads continues to make up over half of the respondents (52%), while dissatisfaction with condition of paved / pedestrian areas makes up over a third of respondents (36%)



Figures in brackets show change since July (S13)

LA7. Thinking about where you live, how satisfied or dissatisfied are you with your experience of the following in your local area?
Unweighted base: All respondents Survey 13, 1540; Survey 14, 1482

Satisfaction with parks and other green spaces, local services and amenities and their nearest town centres are in line with July, with little significant variation

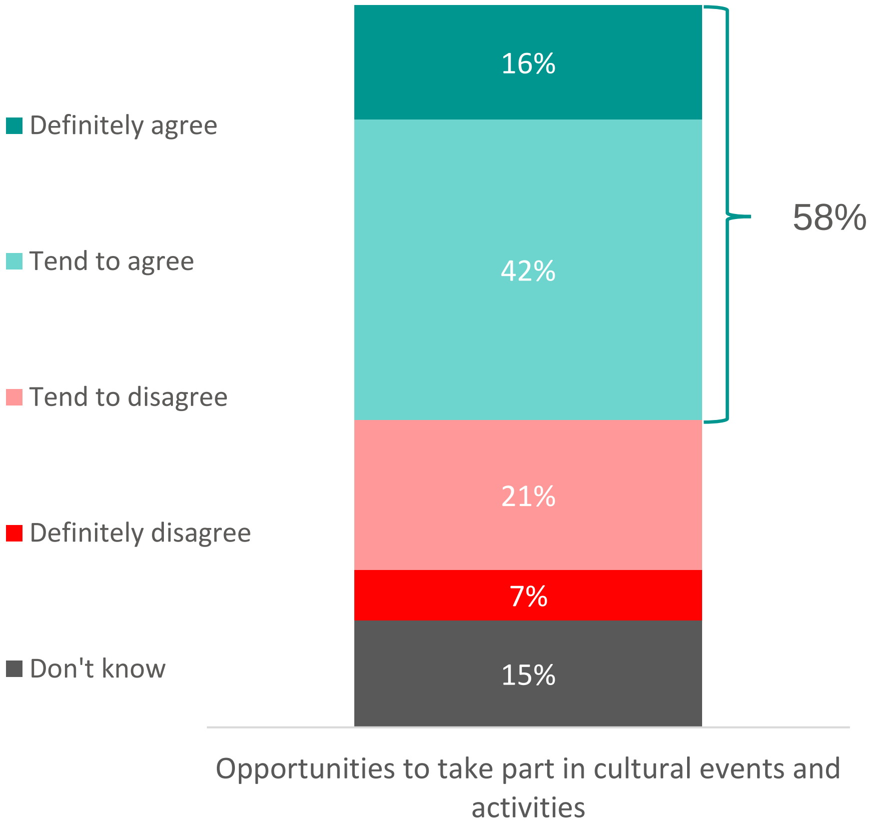


Figures in brackets show change since July (S13)

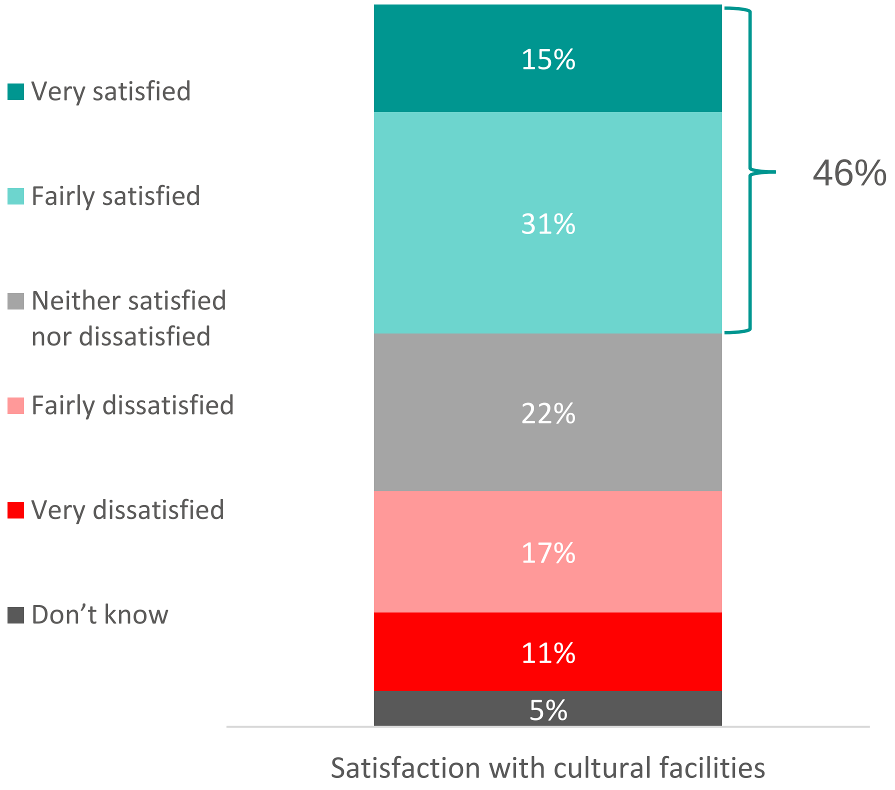
LA4. Generally, how satisfied or dissatisfied are you with…? Unweighted base: Survey 13, 1540; Survey 14, 1482 (All responses)

Almost 3 in 5 (58%) agree there are opportunities to take part in cultural events and activities in their local area. Significantly more people are satisfied with cultural facilities available, such as museums, theatres and events than in July (46% cf. 40%)

To what extent do you agree or disagree that there are opportunities to take part in cultural events and activities



Satisfaction with cultural facilities such as museums, theatres, and events



Figures in brackets show change since July (S13)

LA5. To what extent do you agree or disagree that there are opportunities to take part in cultural events and activitiess in your local area? LA4. Generally, how satisfied or dissatisfied are you with…? Unweighted base: Greater Manchester Residents S13, 1540; S14, 1842

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