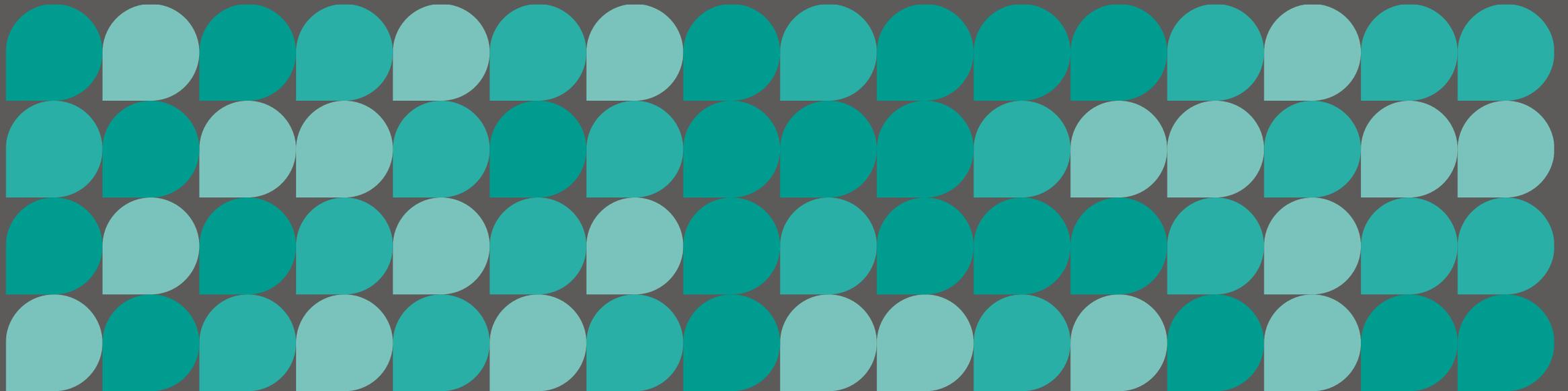


Greater Manchester Residents' Survey

Survey 3

September 2022

Fieldwork conducted 1st – 21st September



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Introduction and methodology

Background [page 4](#)

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Background

- This report presents summary findings from a survey carried out in September 2022, alongside those from surveys in February and April.
 - This research study of Greater Manchester residents was conducted amongst a representative sample of 1677 residents from across all ten of the city region's local authority areas, between 1st and 21st September (with a small number of additional online responses received in the days following).
 - These surveys build upon the work of Greater Manchester's Covid-19 residents' surveys, conducted between December 2020 and December 2021. They expand on these by also looking at the key pillars of the wider Greater Manchester Strategy and its vision for a fairer, greener and more prosperous city region. The most recent third survey aims to build upon the findings from Survey 1 and 2, to continue informing approaches and monitoring impacts in particular for the following shared commitments:
 - tackling food and fuel poverty
 - ensuring digital inclusion for all
 - This third survey also asks dedicated questions about the rising cost of living, having emerged as a key issue from residents from the previous two surveys.
 - While the information within this report builds up findings on these three areas of insight, this is still only the third survey in a series that will continue on a bi-monthly basis. These results should be treated as indicative rather than conclusive at this stage – they are used best as indicators to open up further dialogue. To help with these insights, the decision has been made to provide data for the two sections listed in the bullet points above using responses merged from surveys 1 and 2 when comparing with survey 3. This has been done to provide more stable and robust sample sizes for sub-group analysis.
 - The focus of this research is therefore to provide a growing base of evidence, which can initially serve as a way to highlight potential trends and indicators which the Combined Authority, individual local authorities and Greater Manchester partners can begin to respond to and explore in greater detail. As this evidence base grows across intended multiple surveys, we will be able to provide greater depth on which groups are likely to be more affected by the issues explored, highlighting those where more investigation would prove useful.
 - Overall, these regular ongoing insights are designed to help inform a range of stakeholders across Greater Manchester so that they have as much information as possible about where to target support, communications and engagement activities, and resources to improve the lives of those living within Greater Manchester.
-

Methodology and sample

Methodology

- Between February and September 2022, BMG Research undertook three surveys, all comprising of circa. 1,500 residents from across Greater Manchester. This included an intended sample of 750 online panel respondents, 250 telephone respondents, and a trial of 500 online ‘river sampled’ respondents (those who responded to adverts, offers and invitations to take part in the surveys).
- The mix of using majority web-sampling with a smaller telephone element was selected so that a representative and robust sample of Greater Manchester residents could be sourced within budget.
- The telephone element of this sample is included so that those without internet access could take part in the survey. This is particularly important for the questions on digital inclusion. However, because of the constraints of the sample, please be aware that insights based on the telephone data are less robust because of the smaller base size.
- Each survey is designed to take 15 minutes on average for respondents to complete; however, due to the emotive nature of the topics covered, interviews by telephone tend to take longer than this.
- Quotas are set to ensure the sample broadly reflects the profile of respondents by gender, age, ethnicity and disability, with further consideration for wider protected and key characteristics.
- Weights have been applied to the data gathered to ensure the sample matches the population profile by age, gender and locality, and to ensure consistency between individual surveys.
- Drawing on learnings from surveys 1 and 2, BMG increased the number of invitations and revised their targeting for the ‘river sampling’ approach in survey 3. This proved effective, particularly in reaching potential respondents at off-peak times to capture the working population outside of core hours. The river sample exceeded its target - accounting for 40% of the sample, and thereby providing a significant contribution to the size, and therefore robustness, of the overall sample of the survey.

Sample breakdown

Sample info (all fieldwork within 2022)

Survey	1	2	3
Fieldwork start	9 February	25 March	1 September
Fieldwork end	25 February	11 April	21 September
Total respondents	1385	1467	1677
Web respondents	762 (55%)	794 (54%)	785 (47%)
Phone respondents	250 (18%)	250 (17%)	235 (14%)
River sampling	373 (27%)	423 (29%)	657 (39%)

Key demographics (before weighting applied)

Male	597	593	739
Female	761	843	906
16-24	113	96	123
25-44	413	421	455
45-64	484	538	525
65+	375	412	574
White	1201	1314	1503
Within racially minoritised communities	166	137	159

Report contents and guidance

Report contents & guidance

The report presents a range of tables and charts with accompanying narrative to highlight the key findings from each section of the survey among the sample from this edition of the survey (1,677 respondents), which are presented alongside findings for a 'merged' sample (2,852 respondents) from both survey 1 and 2.

Where relevant, demographic and other population characteristics are also 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). The survey 1 and survey 2 results have been merged in order to show a more robust representation of the metrics regarding food security and digital inclusion.

On some questions, it should be noted that responses have been filtered only to include those who were asked relevant questions (e.g. those in work, or with children), and bases may be lower than the full sample in some instances. Where relevant, this has been noted on the slides, along with the unweighted base sizes.

The [initial section](#) provides an overview of respondents' attitudes and experiences of living with Covid-19. This is followed by insights into the primary sections of the report: the [level of food security they are experiencing](#), their [experiences of the cost of living crisis](#), and their [digital access and inclusion](#).

During 2022 there have been many worldwide and national events which could impact on the attitudes and feelings of respondents. The global pandemic, the Russia-Ukraine war and Brexit are just three significant events. To reflect this, comparisons of the Greater Manchester findings with national-level data have been included where we have identified directly comparable national surveys.

Finally, and with regards to a key point of language, it should be noted that this report uses the term 'from within racially minoritised' 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. 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 survey findings for specific ethnic groups, and recognise that this does not allow full and detailed insight to be gained into the experiences of minoritised ethnic groups. However, as more surveys are conducted and a larger overall sample size is available this more detailed breakdown will become available.

Living safely and fairly with Covid-19

Key findings

[page 8](#)

Overview

[pages 9-10](#)

Covid-19 anxiety

[pages 11-12](#)

Vaccinations

[pages 13-14](#)

Covid-19 infections and lasting impacts

[pages 15-17](#)

Covid-19-safe behaviours

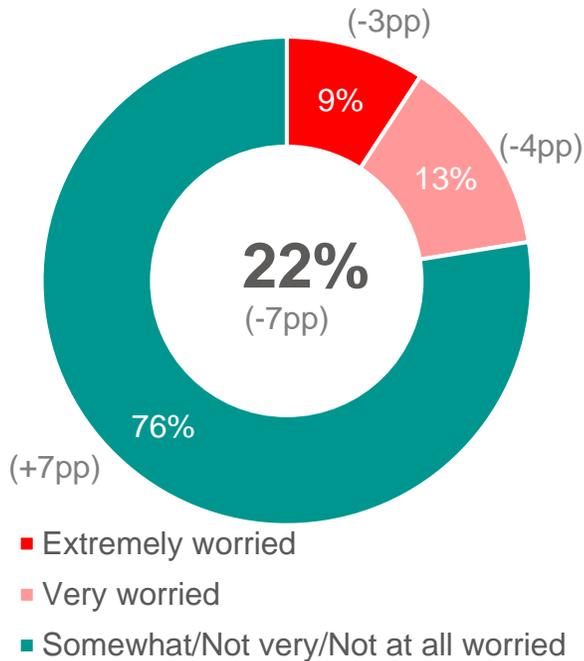
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Living safely and fairly with Covid-19 – key findings

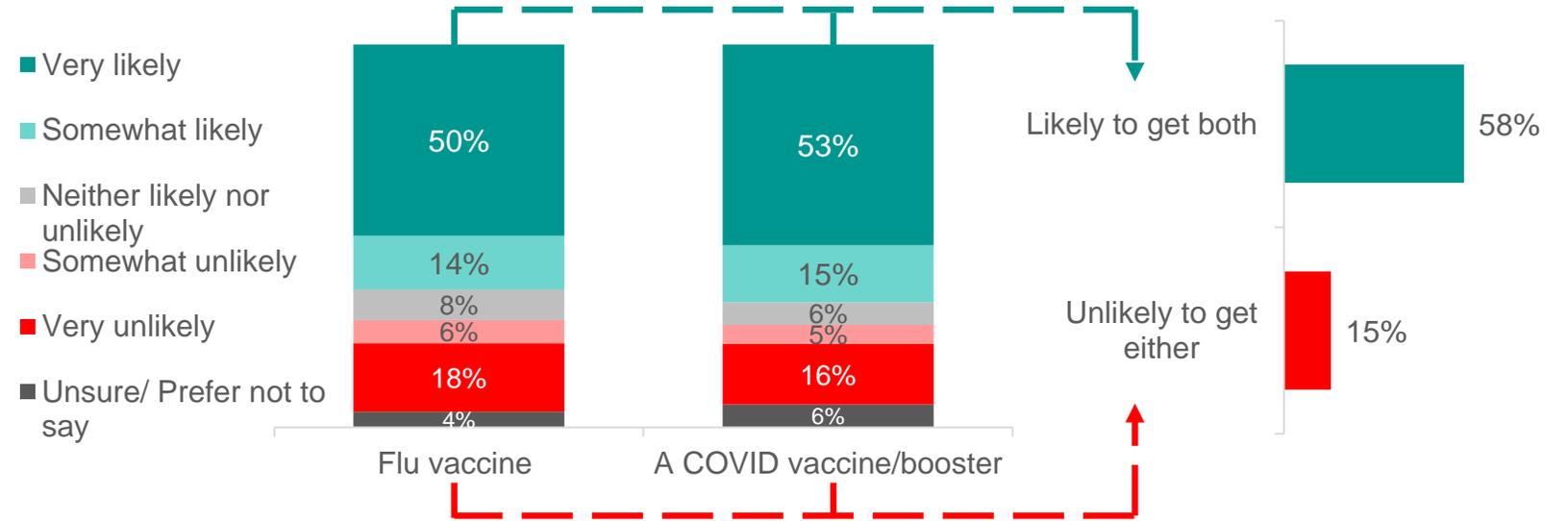
- **WORRIES / CONCERNS:** Around a quarter of respondents (22%) are still extremely or very worried about Covid-19 and its impacts. This is a decrease from the previous survey (30%), which took place as the last remaining national restrictions were being lifted (April 2022).
 - **COVID-19 INFECTIONS:** Around 6 in 10 respondents (62%) say they have had coronavirus at some point – including half of respondents (52%) who had their infection confirmed by a positive test.
 - **LONG COVID:** Around four in ten respondents who have had coronavirus (40%) say they are still experiencing impacts as a direct result. The most common of these are enduring physical health impacts (experienced by over a quarter, 28%); more than 1 in 10 say they are still experiencing direct mental health (16%) and/or financial (12%) impacts.
 - **COVID-19-SAFE BEHAVIOURS:** There have been declines in all the behaviours which are advised to stop the spread of the virus. Respondents still wearing face coverings have declined by half to around 1 in 4 (25% in crowded spaces, 26% on public transport). But more than three quarters still say they regularly wash or sanitise their hands (80%), or stay away from work if they feel unwell (78%).
 - **VACCINATIONS:** Similar proportions of respondents say they would get a Covid-19 vaccine or booster or a Flu vaccine if offered this winter – with around two in three very or somewhat likely to do so (68% Covid-19, 64% Flu) and fewer than one in five very unlikely (16% Covid-19, 18% Flu).
-

Summary: Living safely and fairly with Covid-19 (2/2)

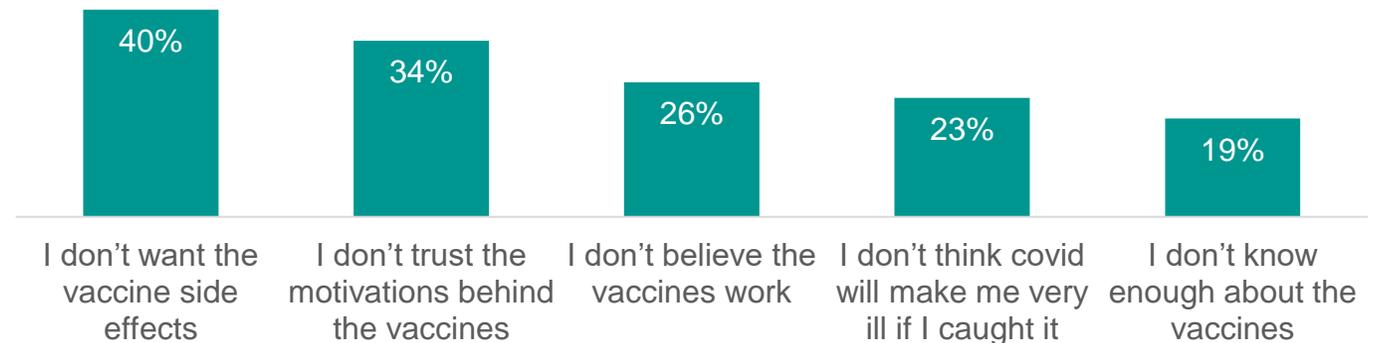
Overall, around a quarter of respondents are still extremely or very worried about Covid-19 and its impacts. This is a decrease from the previous survey in April (shown in brackets below)



Over half of respondents said it was very likely that they would get a Covid-19 booster and a flu vaccine if offered one this winter

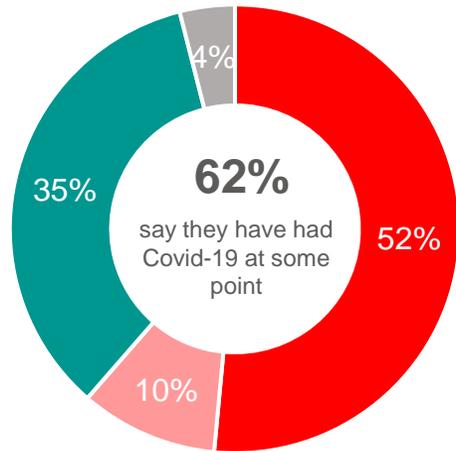


The most common reasons for not getting a Covid-19 vaccine are not wanting the vaccine side effects, and not trusting the motivations behind it (n=296)



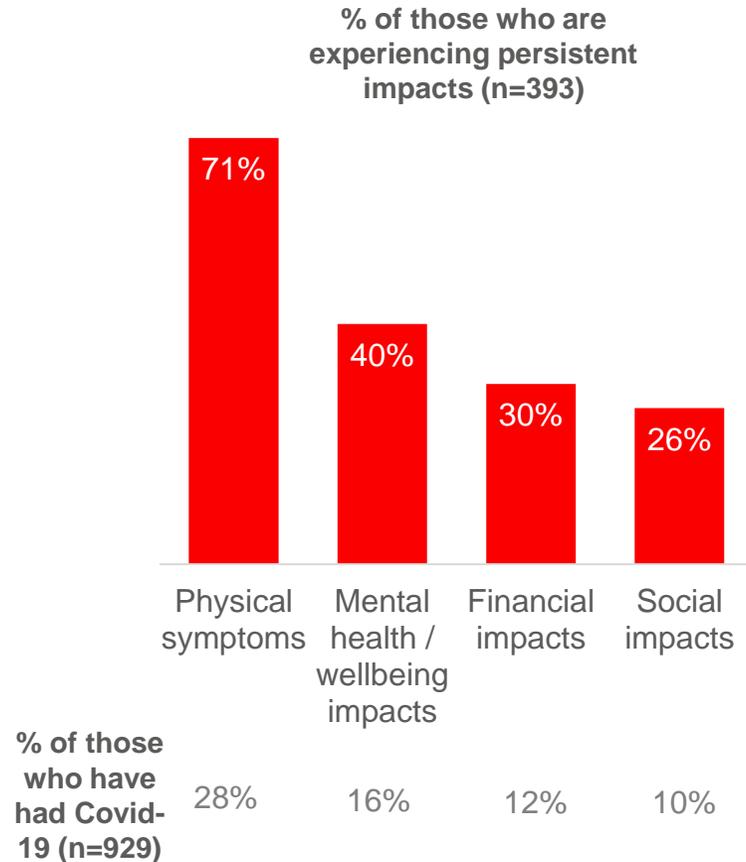
Summary: Living safely and fairly with Covid-19 (1/2)

Half of respondents say they have definitely had Covid-19 before. A further one in ten think they probably have



- Yes – definitely (ie tested positive)
- Yes – probably (had symptoms, but not confirmed by positive test)
- No
- Not sure/prefer not to say

39% of those who have had Covid-19 still have impacts, of which:

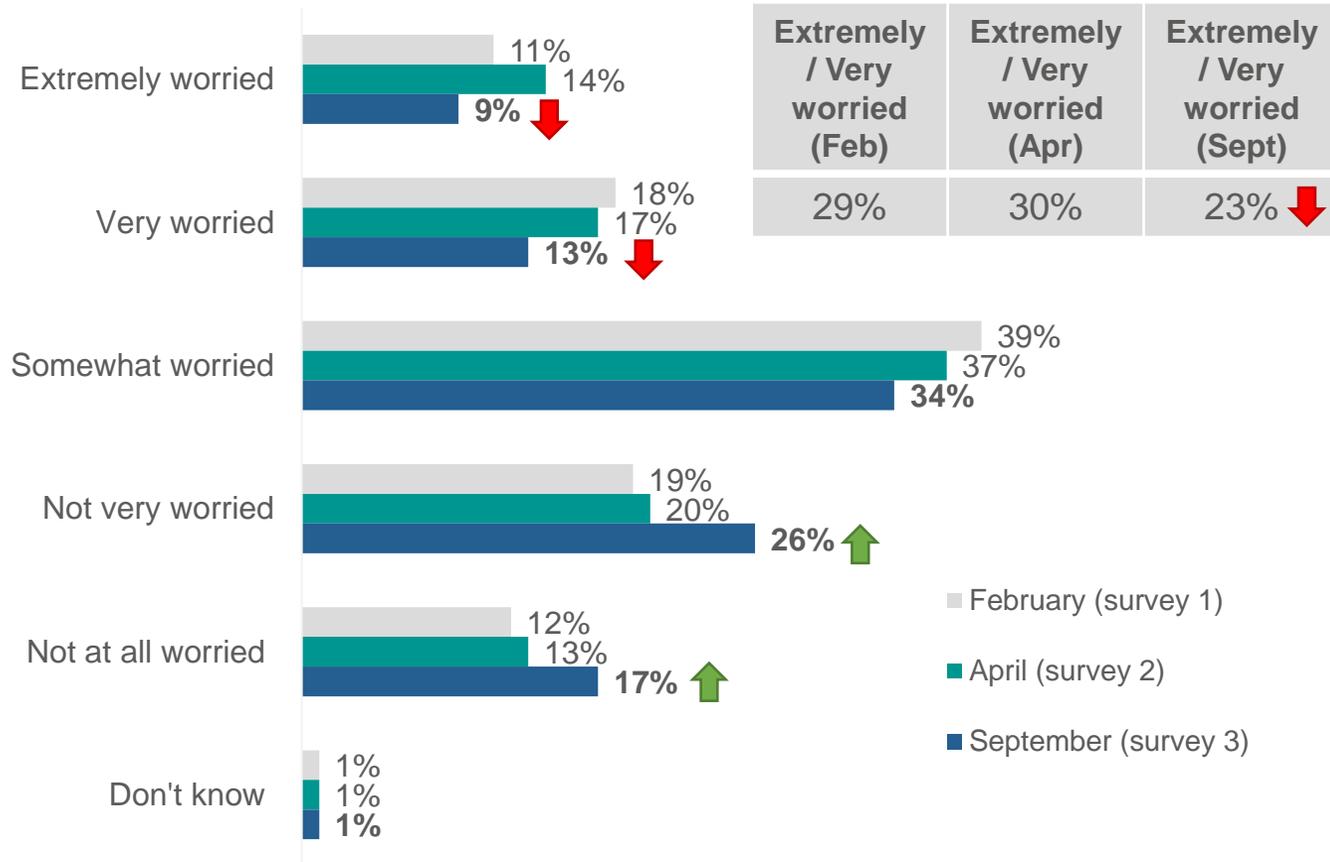


Nearly all Covid-19 safe behaviours are now being followed by fewer respondents than in April

Behaviour	Change since April 2022
80% Regularly washing / sanitising hands	(-5pp)
78% Staying home if feeling unwell	(+6pp)
67% Considering risks to other people	(-9pp)
65% Wearing a mask when visiting healthcare settings	(-16pp)
53% Meeting people outdoors	(-2pp)
48% Opening doors/windows when indoors with non-household members	(-3pp)
26% Wearing a mask on public transport	(-28pp)
25% Wearing a mask in crowded spaces	(-26pp)

Overall, under a quarter (23%) of respondents are **very or extremely worried about Covid-19. Those more worried include those who might struggle with access to food and those whose first language is not English**

Overall, how worried are you about Covid-19?



↑ ↓ Significantly higher/lower than April (Survey 2)

Respondents more likely to be extremely/very worried about Covid-19 (vs. 23% GM average)*:

Demographics

- Those who first language is not English (51%)
- Those who previously had caring responsibilities (42%); or currently do (39%)
- Disabled respondents (36%); including mental ill health (41%); mobility disability (41%); other disability (36%)
- Households within racially minoritised communities (35%), in particular Pakistani respondents (46%)

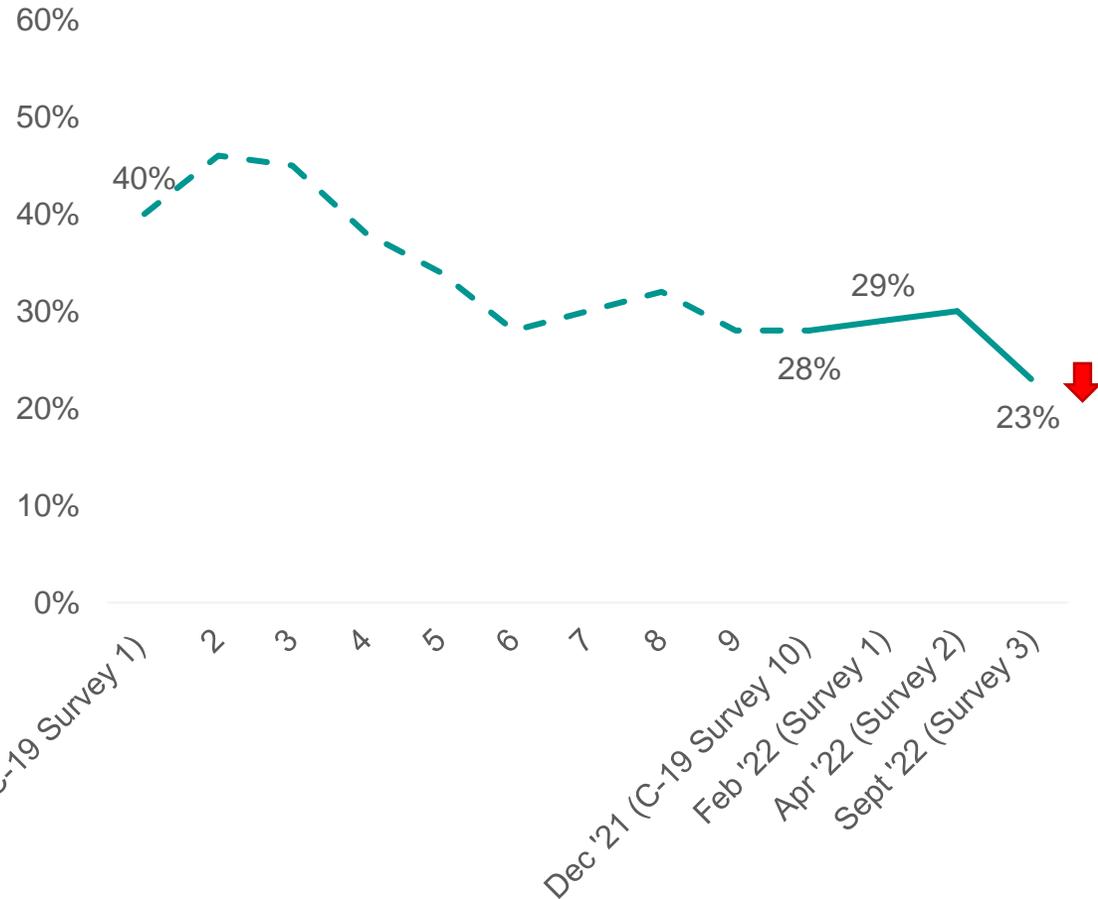
Individual and/or family circumstance

- Those who have someone else in their household who has cut the size of or skipped a meal (46%); or have done so themselves (38%)
- Those who have not eaten the whole day for lack of money (46%); nor has someone else in their household (44%)
- Those who are not in work due to ill health or disability (41%); homemakers (37%)
- Those whose children are entitled to free school meals (39%)
- Those working from home all of the time (36%)
- Those not confident using digital services online (35%)

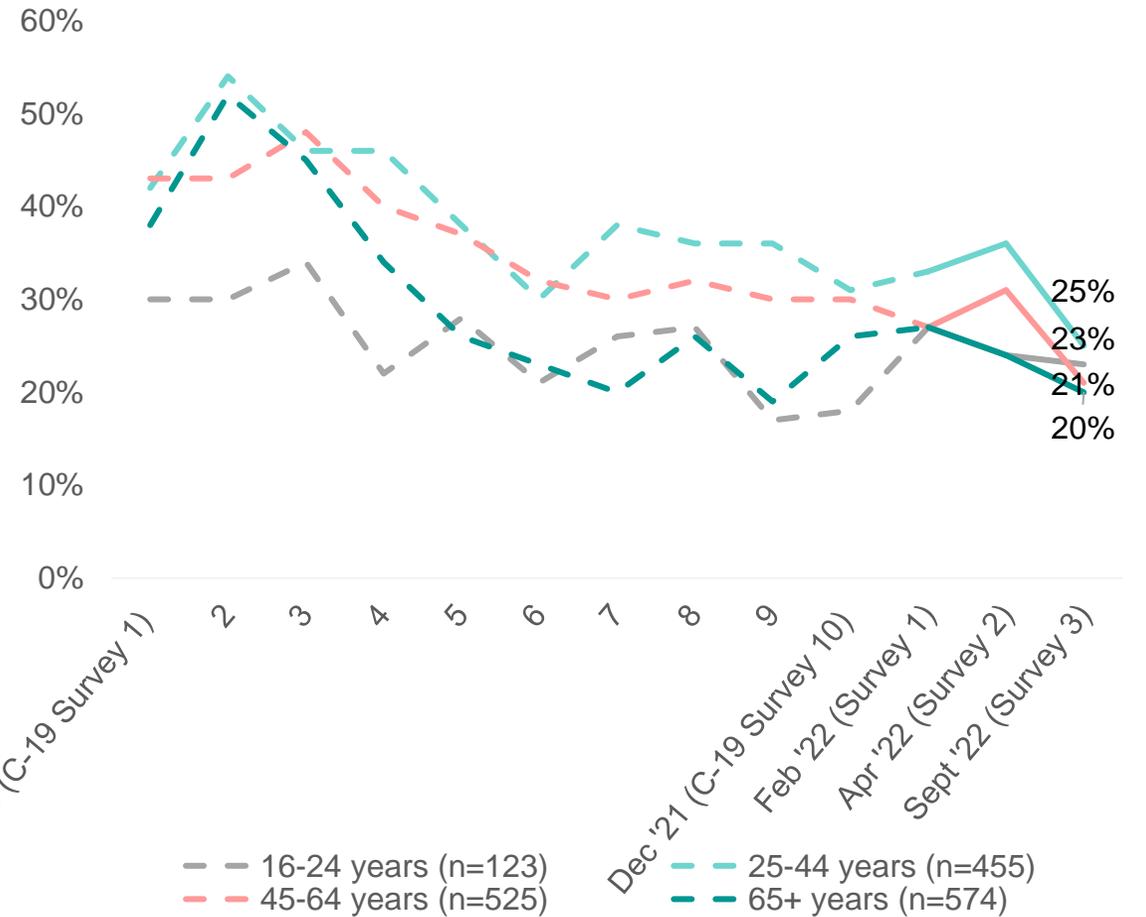
*Groups with a base size below 50 are not included

After remaining steady at under three in ten from December '21 to April '22, the proportion of respondents who say they are **extremely or very worried about Covid-19 and its impacts** has decreased to under a quarter (23%)

% Extremely/very worried about Covid-19 – overall



% Extremely/very worried about Covid-19 – by age



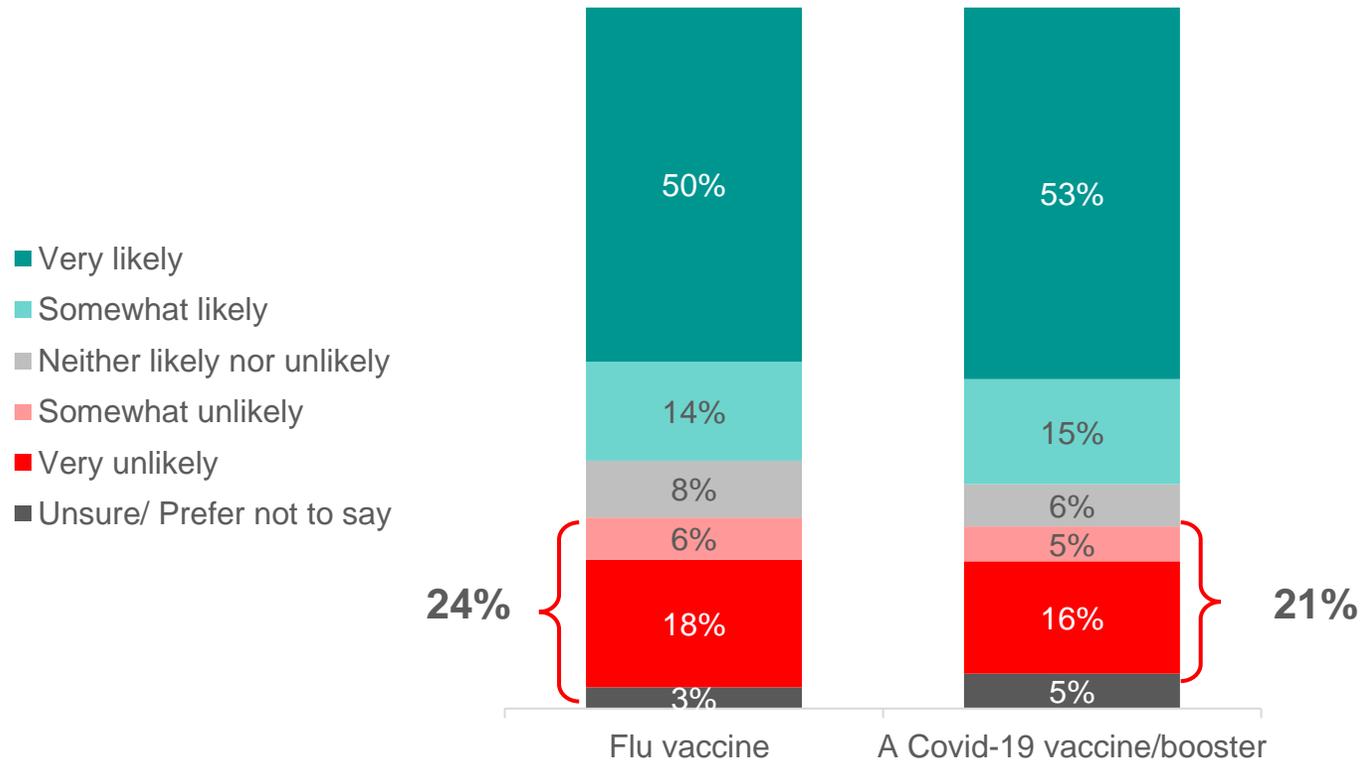
↑ ↓ Significantly higher/lower than April (Survey 2)

B4. Overall, how worried are you about coronavirus and its impacts?

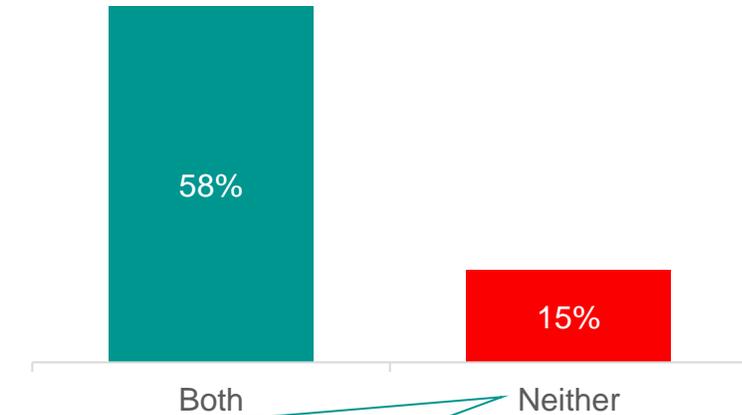
Unweighted base: All respondents: Covid-19 Tracker Survey 1: 1015; Survey 10: 1015; Greater Manchester Residents Survey 1: 1385; Survey 2: 1467, Survey 3: 1677

Around two thirds of respondents are **likely to get a Covid-19 vaccine/booster (68%)** or **flu jab (64%)** if offered one this winter. Three in five (58%) are likely to get both vaccines, while 15% are unlikely to get either

Likelihood of getting the flu vaccine or Covid-19 vaccine/booster



Likelihood of getting both vaccines vs. neither vaccine (very/somewhat unlikely or unlikely)



% who are significantly more likely to get neither vaccine compared to GM average (15%)*:

Demographics

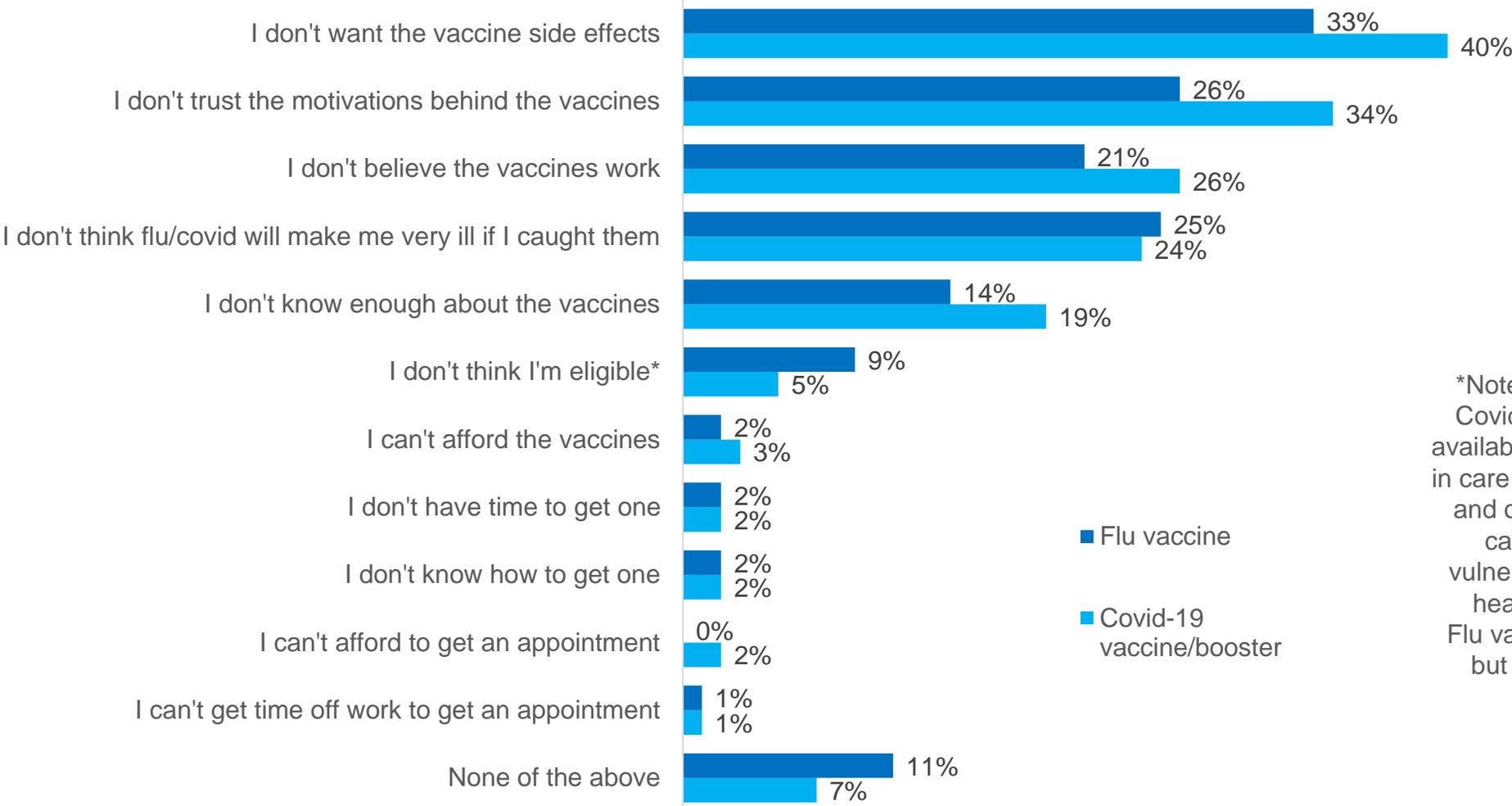
- Those aged 25-44 (23%)

Individual and/or family circumstance

- Those are not working from home at all (22%)
- Those who have a household income between £10,400 to £15,599 (18%)
- Those who have children in primary school (21%)
- Those who are not worried about Covid-19 (22%)

Two fifths (40%) of respondents who are unlikely to get the Covid-19 vaccine say this is because they do not want the side effects associated with it, while a third (34%) don't trust the motivations behind it

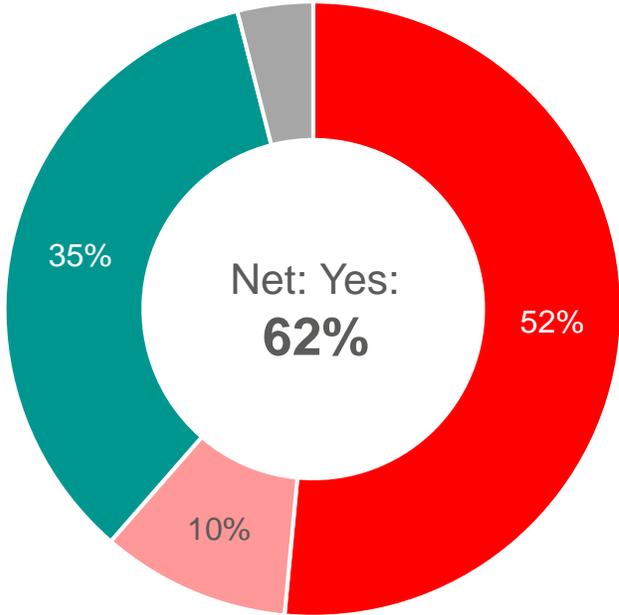
Reasons behind not wanting to get the flu vaccine or Covid-19 vaccine/booster



*Note - At the time of fieldwork Covid-19 booster vaccines are available mainly to over 50s, those in care homes, those aged 5 years and over in clinical risk groups, carers/family members of vulnerable people and front-line health and social care staff. Flu vaccines are available to all, but are free to over 50s and groups of higher risk

Nearly two thirds (62%) of respondents **have had Covid-19 at some point**. Just over half (52%) have definitely had it, having tested positive. Those aged 25-34 (65%) are significantly more likely to have had a confirmed case

Have you ever had Covid-19?



■ Yes - definitely ■ Yes - probably
■ No ■ Don't know

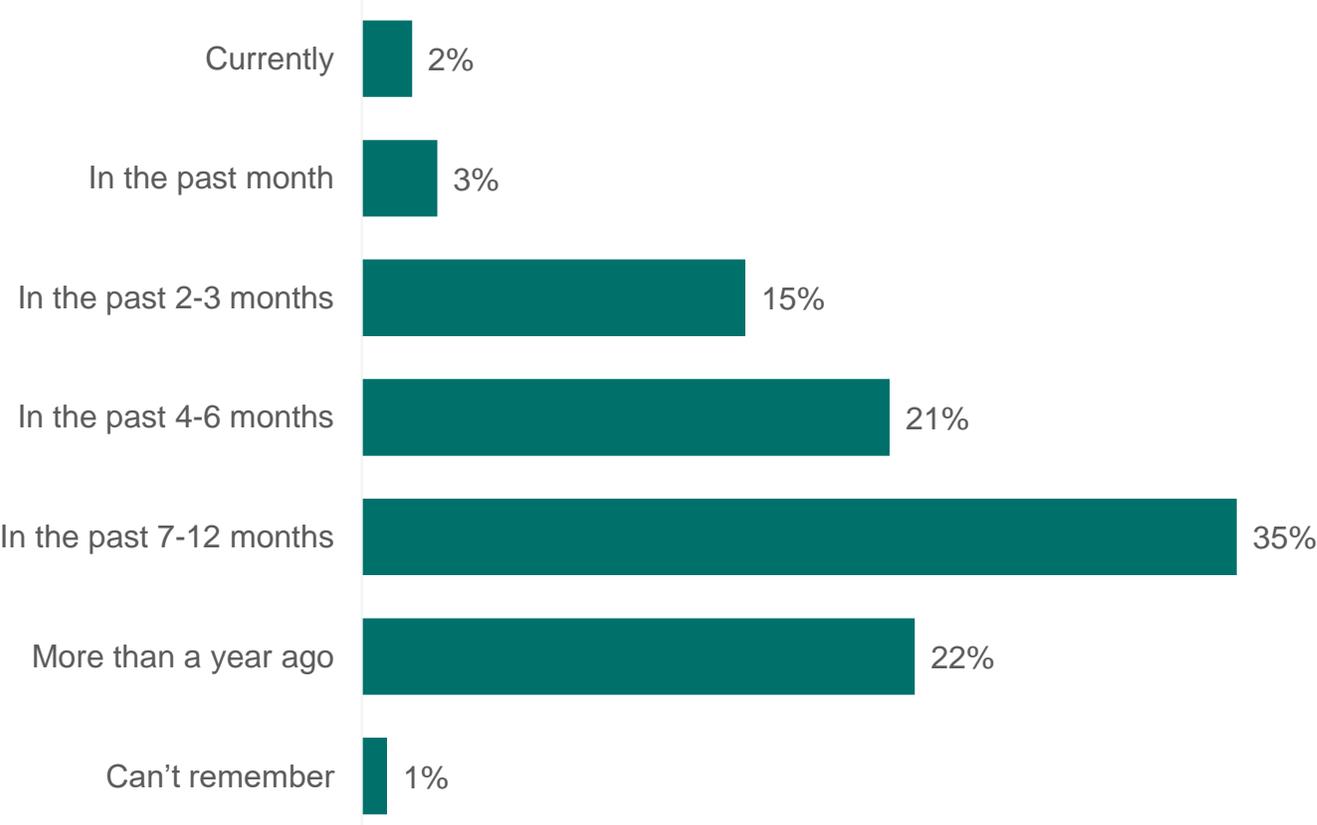
Respondents more likely to have definitely had Covid-19 (vs. 51% GM average)*:

- Demographics**
- Aged 25-34 (65%)
 - Not heterosexual (62%)
 - Have children (59%)
 - Female (55%)
- Individual and/or family circumstance**
- Those not working from home at all (60%)
 - Those who had to borrow more money or use more credit in the last month than they did a year ago (57%)

*Groups with a base size below 50 are not included

Of those who have **tested positive** for Covid-19, over half (57%) have most recently done so over 6 months ago

When did you most recently have coronavirus?

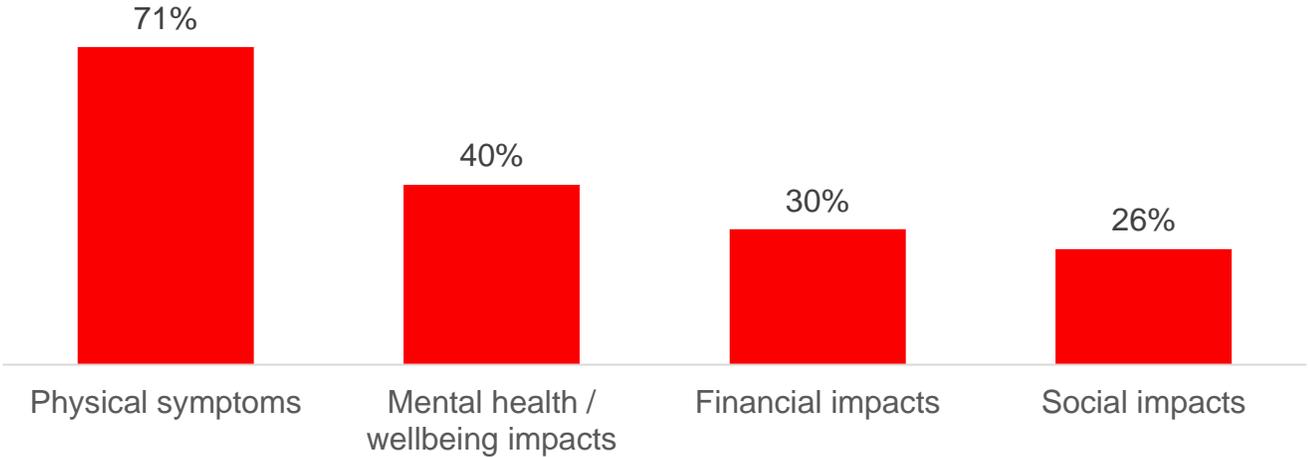


ADD4_W3. When did you most recently have coronavirus?
Unweighted base: 954 (Those who have had Covid-19)

39% of those who have had Covid-19 are **experiencing some lasting impacts**. Of these, over two thirds (71%) are experiencing physical symptoms, and two fifths (40%) mental health or wellbeing impacts

62% of respondents have had Covid-19.
 39% of this group are suffering from lasting symptoms.
 Of this 39%...

Are you currently experiencing any of the following as a result of coronavirus?



% who are significantly more likely to be suffering last effects from Covid-19 compared to GM average (39%)*:

Demographics

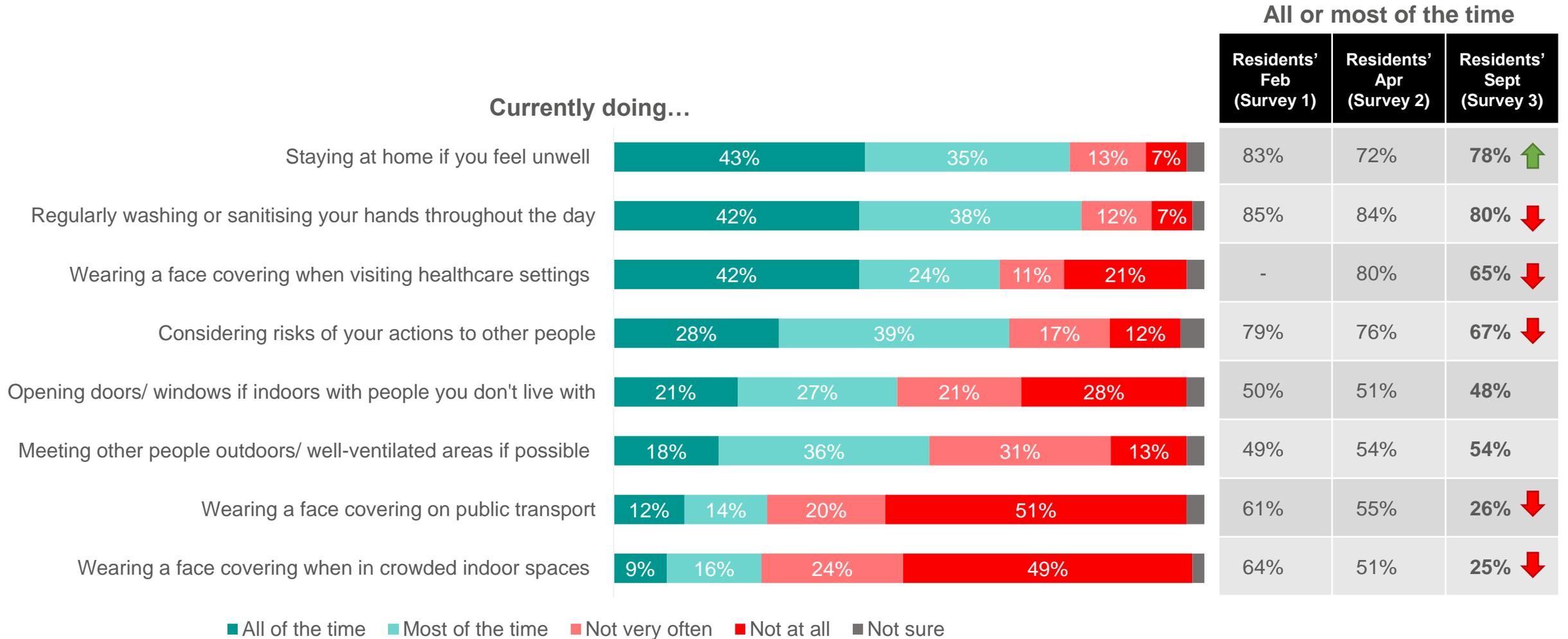
- Those who are Asian or Asian British (63%)
- Those who currently have caring responsibilities (63%)
- Disabled respondents (61%) including those who suffer from mental ill health (67%)

Individual and/or family circumstance

- Those who have not eaten for the whole day for lack of money (71%)
- who have someone in the household who has cut the size of or skipped meals (57%)
- Those who are worried about Covid-19 (72%)
- Those who have had to borrow money or use more credit in the last month (50%)

*Groups with a base size below 50 are not included

The proportion of respondents saying they wear face coverings in any situation has significantly decreased since April. However, staying at home if you feel unwell has increased over the same period



↑ ↓ Significantly higher/lower than April (Survey 2)

Food security

Key findings

Approach and sample

Introduction to the food security score

Overview of food security

Past 12 months activity

page 20

pages 21

page 22

pages 23-26

pages 27-30

Food security – key findings

- **EXTENT OF FOOD INSECURITY:** 42% of all respondents in September had a food security level classified either as ‘low’ or ‘very low’ – and have therefore experienced food insecurity in the last twelve months.
- **NUMBER OF HOUSEHOLDS AFFECTED:** Assuming that this sample is representative of the wider Greater Manchester population, this is equivalent to approximately 500,000 households across the conurbation reporting some experience of food insecurity during the last 12 months (‘low’ or ‘very low’ food insecurity).
- **TRENDS SINCE SPRING 2022:** The issue of food security was explored in detail in previous Greater Manchester Residents’ Surveys (in February and April 2022). Comparing latest results with those from six months ago, food insecurity is shown to have substantially increased (now affecting 42% of households, compared to 35% of households in the Spring). This equates to over 80,000 more households saying they have had problems at some point in the last twelve months.
- **HOUSEHOLDS WITH CHILDREN:** Food insecurity continues to impact disproportionately upon households with children (56% now reporting food insecurity at some point in the last year, compared to 42% of all households).
- **HOUSEHOLDS WITHOUT CHILDREN:** The *fastest changing* part of the picture within Greater Manchester is the proportion of households without children experiencing the most extreme forms of food security (‘very low’ levels of security) – which is now reported by one in five survey respondents in a household without children.

Approach and sample – Food security

Approach

This report presents summary findings for survey 1 (February) & 2 (April), and survey 3 (September) of the 2022 research study of a representative sample of the Greater Manchester population. In this section the sample for the first two surveys, both conducted in Spring 2022, has been merged and compared to the result from survey 3.

The information within this section provides the findings on the surveys' food security questions. The data represents the first three surveys in a series intended to run throughout 2022. Questions of this nature have not been asked of Greater Manchester residents prior to Spring 2022 and as such, these results are best used primarily as indicators to open up further dialogue.

The focus of this research is therefore to provide a growing base of evidence, one which can initially serve as a way to highlight potential trends and indicators which individual Local Authorities can explore in greater detail. As this evidence base grows across multiple surveys we will be able to provide greater depth on which groups are likely to be more affected by the issues explored, highlighting those where more investigation would prove useful.

In this survey questions were added in order to gain further insight into the Cost of Living crisis. Some of these look at the cost of food and are directly relevant to food security in Greater Manchester. These can be found on pages 46-48 of this report.

On some questions responses have been filtered on those who were asked relevant questions (e.g. those in work or with children), and bases may be lower than the full sample. Where relevant, this has been noted on the slides, along with the unweighted base sizes.

This section contains a food security score. The methodology for this is broadly as used in the Department for Work & Pensions Family Resources Survey, and based on the US Department of Agriculture's approach to defining food security which is detailed on the following page.

Sample breakdown

Sample info

Spring sample:

Fieldwork start	9 February 2022
Fieldwork end	11 April 2022
Total respondents	2852
Sample used in Food security score	2340
Food security score – Live with children u18	698
Do not live with children u18	1642

September sample:

Fieldwork start	1 September 2022
Fieldwork end	30 September 2022
Total respondents	1677
Sample used in Food security score	1442
Food security score – Live with children u18	400
Do not live with children u18	1042

The food security score

Approach

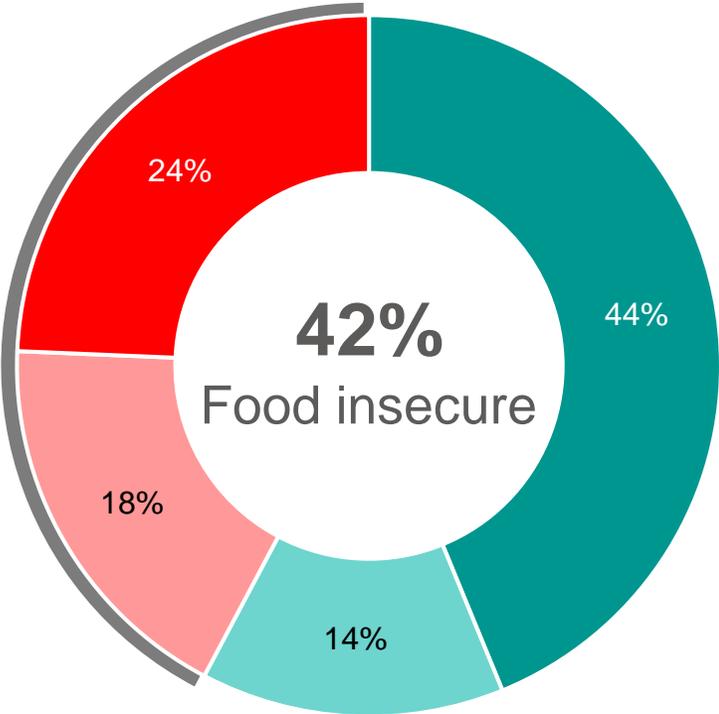
- As mentioned on the previous slide, this food security score is based on an adapted version of the score used by the USDA.
- As part of the residents' survey, respondents were asked questions relating to food security. These question numbers are listed below, and slides relating to each can be found throughout the following section of this report (see question numbers in footer of each slide).
 - All respondents: questions B2** (statements 1-3), **B3** (all statements), **AD1a, AD1b**
 - Respondents with children in household only: questions CH1, CH1a**
- For each question, if a positive response was given (e.g. "Yes, I have had to cut the size of my meals"), then the respondent was scored a point.
- Taking all above questions into consideration respondents' points were totalled, and their score assessed on a scale of food security. This scale differs for those with or without children in their household. A breakdown of the scale can be seen to the right.
- The graphs on the following slide show the overall level of food security as well as food security amongst those with and without children in their household.

Food security score

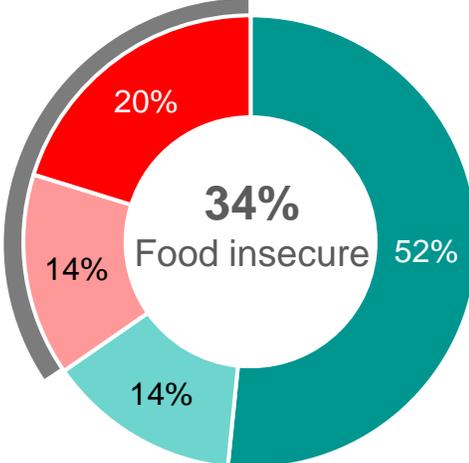
Total points	Household with children	SUM: Food secure/insecure	Total points	Household with children	SUM: Food secure/insecure		
0	High food security	Food secure	0	High food security	Food secure		
1	Marginal food security		1	Marginal food security			
2			2				
3	Low food security	Food insecure	3	Low food security	Food insecure		
4						4	
5						5	
6						6	Very low food security
7			7				
8	Very low food security		8				
9				9			
10				10			
11				11		Max score = 10	
12				12			
13			13				
14			14				
15			15				
16		16					
17		17					
18		18					

Summary: Food security

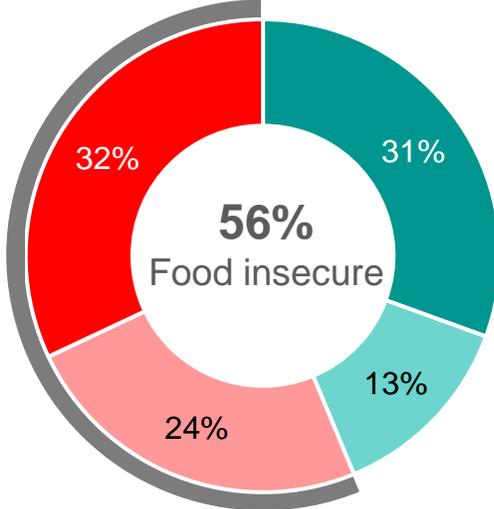
Food security – GM overall



Households without children (n=1,042)

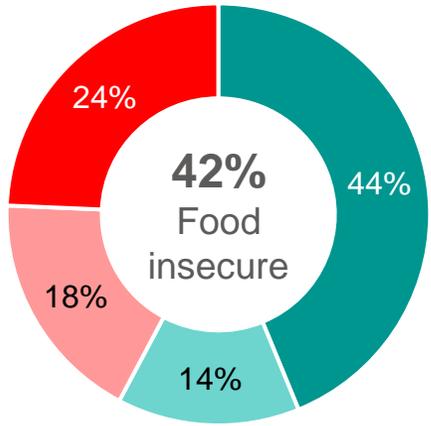


Households with children (n=400)

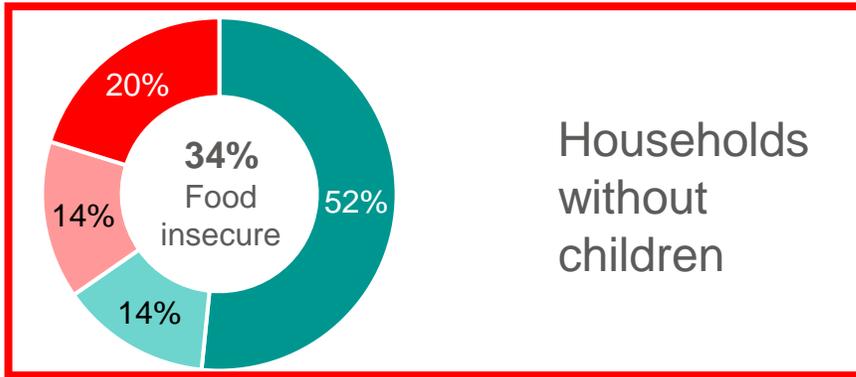


- High food security
- Marginal food security
- Low food security
- Very low food security

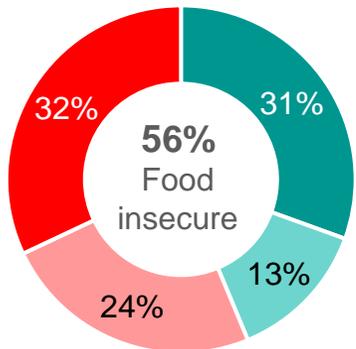
Summary: Food security – Households without children



Greater Manchester overall



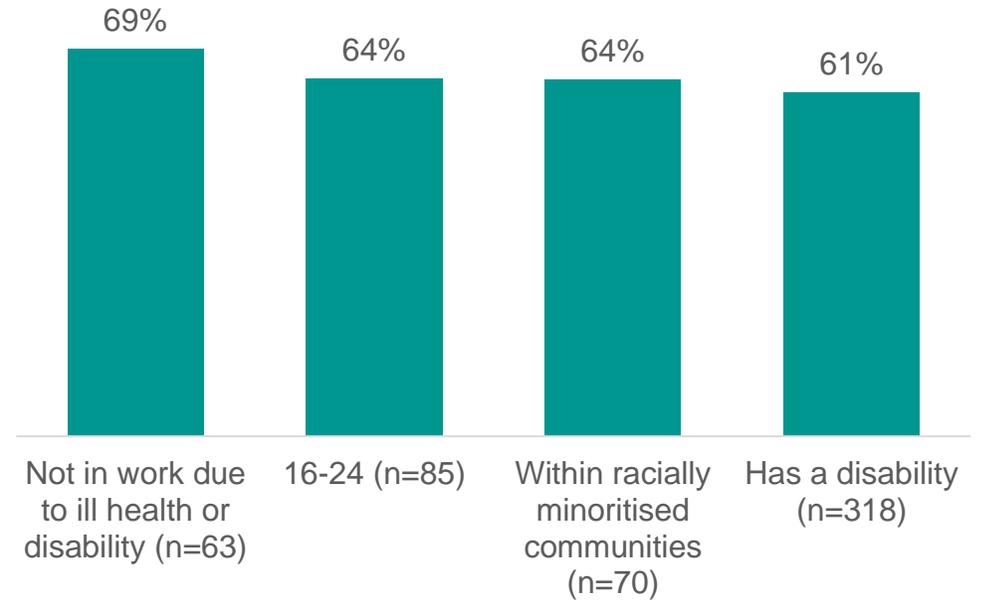
Households without children



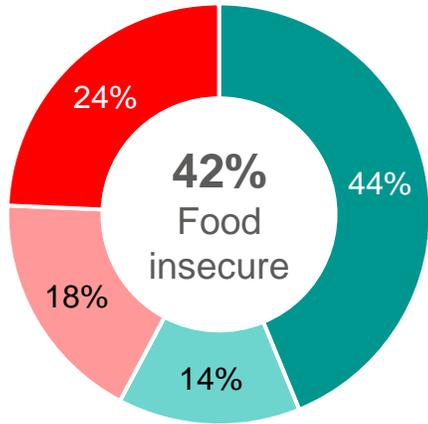
Households with children

- High food security
- Marginal food security
- Low food security
- Very low food security

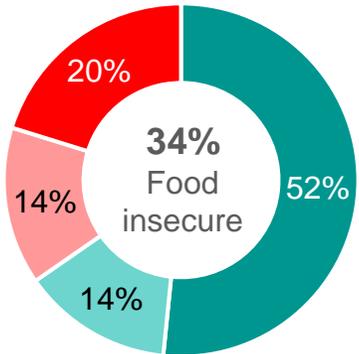
% higher among



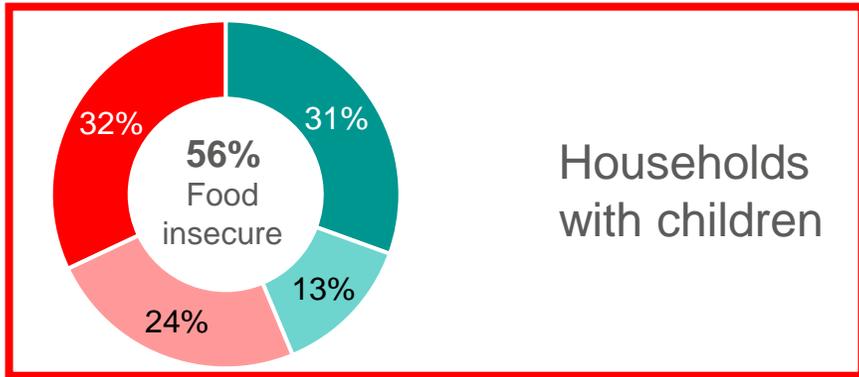
Summary: Food security – Households with children



Greater Manchester overall



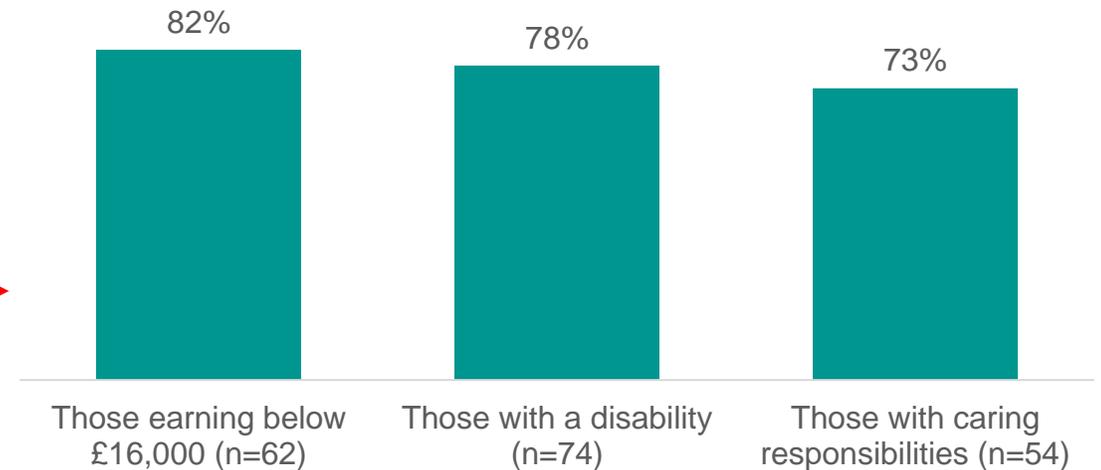
Households without children



Households with children

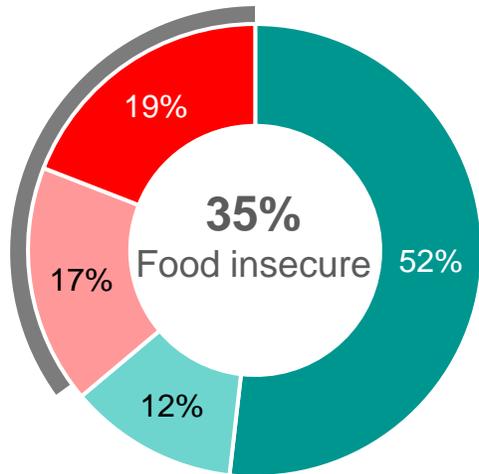
- High food security
- Marginal food security
- Low food security
- Very low food security

% higher among...

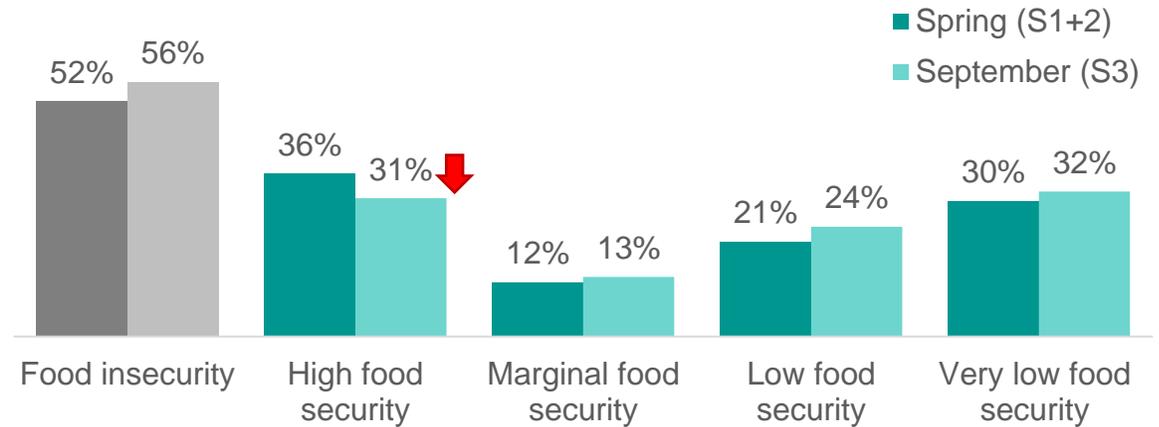


Summary: Food security – Spring (survey 1+2) vs September (survey 3) comparison

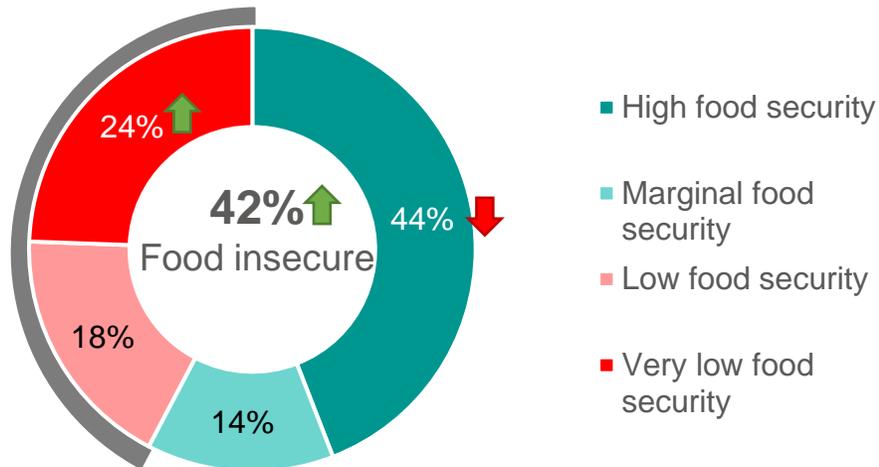
Food security – Overall (Spring (survey 1+2))



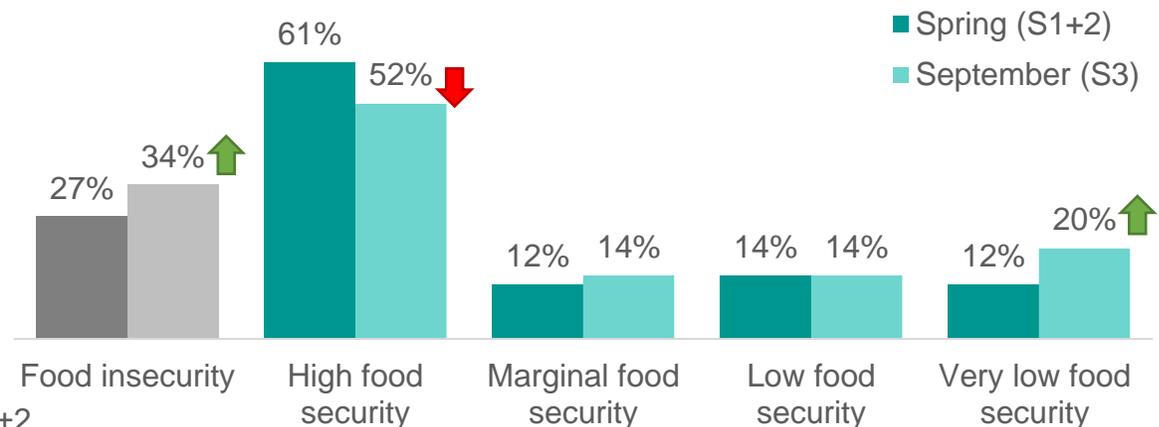
Food security – Households with children



Food security – Overall (September (survey 3))



Food security – Households without children



↑ ↓ Significantly higher/lower than the Greater Manchester Residents' survey 1+2

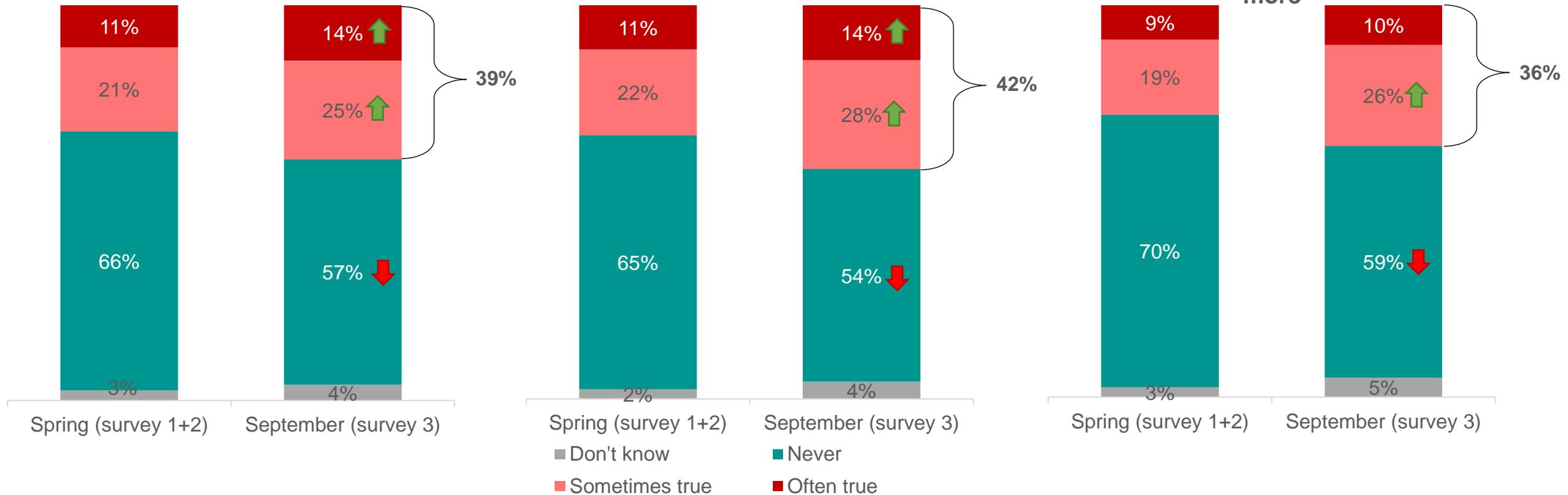
There has been an increase since Spring in the proportion of respondents who are **worried about their food running out (32% to 39%)**, who **couldn't afford balanced meals (33% to 42%)**, or whose **food didn't last and couldn't afford more (28% to 36%)**

In the past twelve months, have you...?

worried whether food would run out before you got money to buy more

been unable to afford to eat balanced meals

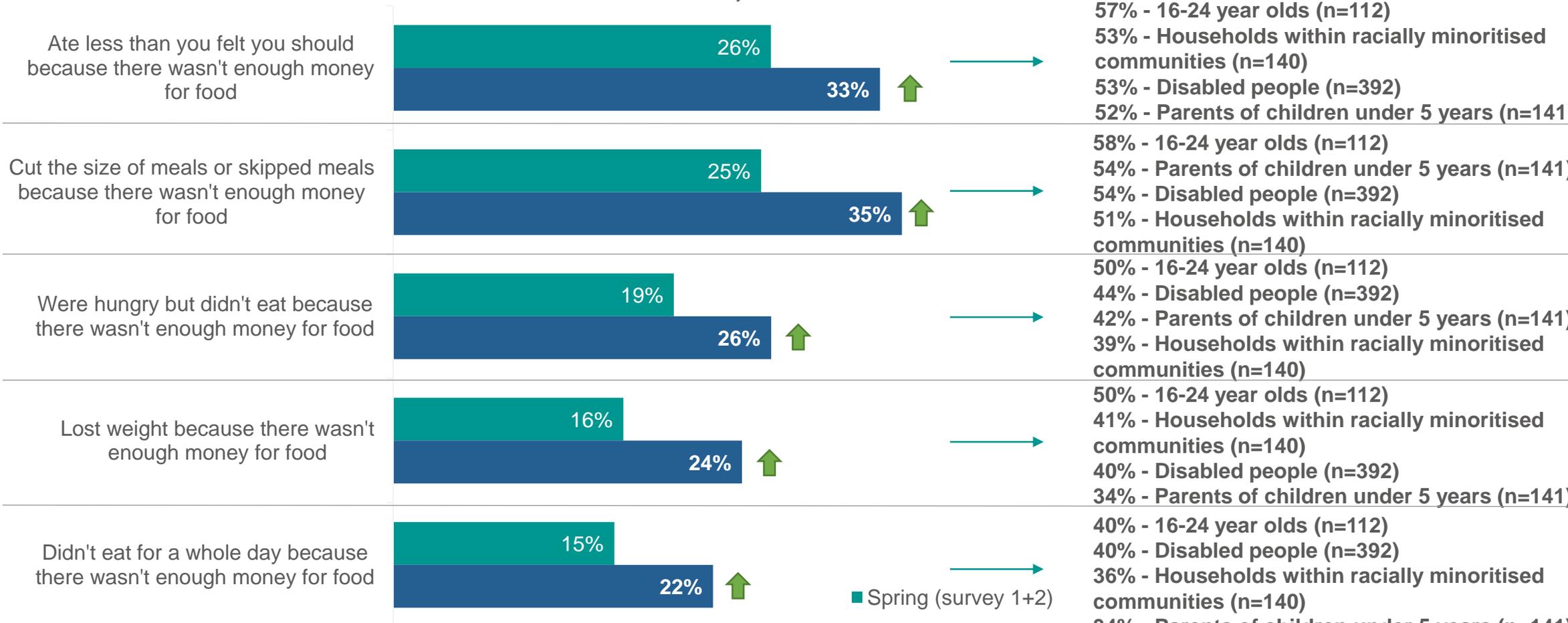
Found that food you bought didn't last, and you didn't have money to get more



↑ ↓ Significantly higher/lower than the Greater Manchester Residents' survey 1+2

The proportion of households in Greater Manchester having their **eating habits impacted in any way due to lack of money** has increased since Spring. Younger respondents, disabled respondents, parents of young children and those within racially minoritised communities are particularly likely to be impacted

In the past twelve months, have you...? (% saying yes, me or someone in the household)



↑ ↓ Significantly higher/lower than the Greater Manchester Residents' survey 1+2

■ Spring (survey 1+2) ■ September (survey 3)

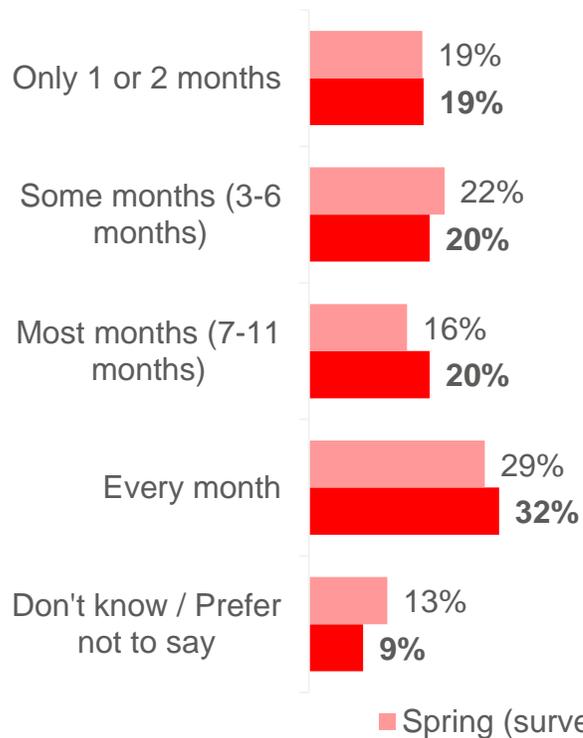
*Groups with a base size below 50 are not included

B3. In the past 12 months have any of the following happened to you or someone else in your household?
Unweighted base: Survey 1+2, 2340; Survey 3, 1442 (Online respondents)

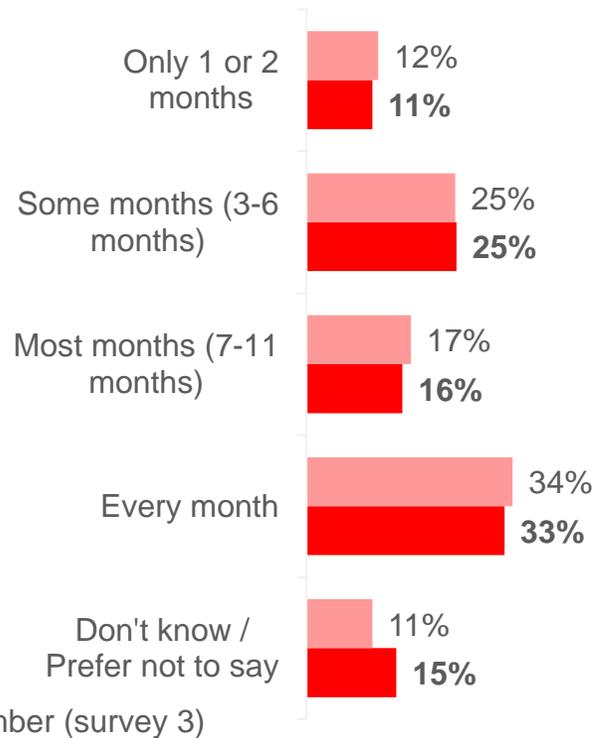
Around a third of respondents who are cutting the size of meals (31%) or not eating for a whole day (33%) are having to do this every month. This proportion has not changed since Spring

Of those who have cut the size of meals, or not eaten for a whole day, how often in the last twelve months, have you...?

... cut the size of your meals or skip meals because there wasn't enough money for food?
(35% of respondents, n=418)



... not eaten for a whole day because there wasn't enough money for food?
(22% of respondents, n=240)



% cutting the size of their meals every month is significantly higher compared to average (32%) among...*

Demographics

- Those with a household income below £10,400 (44%)

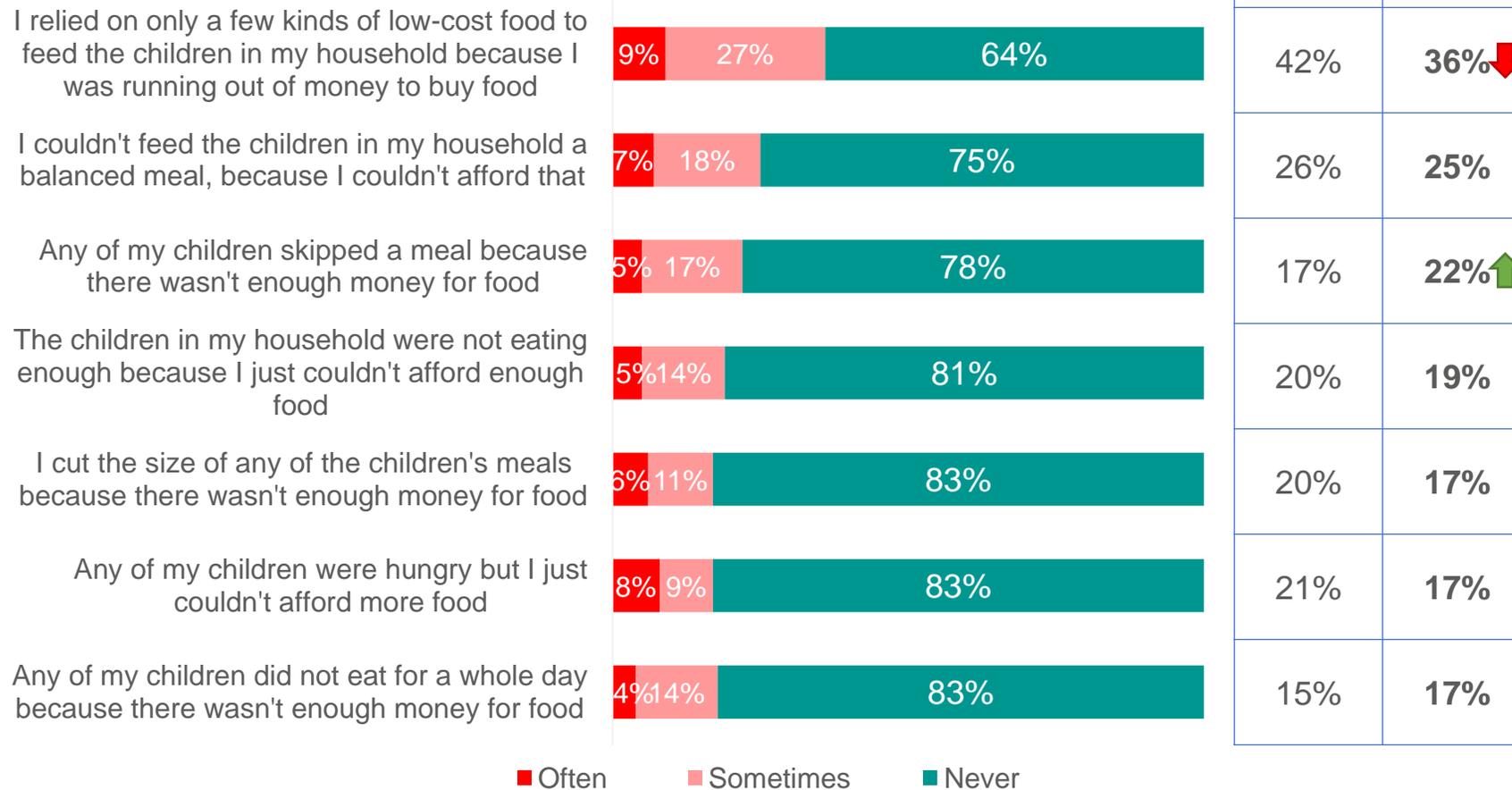
Individual and/or family circumstance

- Those who have borrowed money or used more credit in the last month than they did last year (37%)

*Groups with a base size below 50 are not included

Food insecurity – already established as disproportionately **challenging for households with children** in Surveys 1 and 2 – continues to have a range of impacts on families

In the last year...



Parts of the population significantly more likely to often rely on low-cost food to feed children compared to Survey 3 average (9%) include*:

Demographics

- Disabled people (21%)
- Asian respondents (17%)

Individual and/or family circumstance

- Those who currently have caring responsibilities (16%)
- Those with children under 5 years old (13%)

*Unweighted base: 430 (Respondents with children in the house) Groups with a base size below 50 are not included

↑ ↓ Significantly higher/lower than the Greater Manchester Residents' Spring (Survey 1+2)

Cost of living

Key findings

[page 32- 33](#)

Approach and sample

[page 34](#)

Overview

[pages 35-36](#)

Life satisfaction and anxiety

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Financial situation

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Savings and borrowing

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Energy affordability

[pages 44-46](#)

Food affordability

[page 47-49](#)

Cost of living – key findings (1/2)

Survey 3 introduced (for the first time) a major focus on the current cost of living crisis. Questions mirror those that have been asked nationally by the Office of National Statistics so that benchmarking can be undertaken.

OVERALL IMPACTS AND CONCERNS ABOUT COST OF LIVING

- The impacts of the cost of living crisis are reaching far beyond ‘disadvantaged’ parts of our population: 4 in 5 (84%) Greater Manchester respondents say their cost of living has increased over the past month and a similar proportion (81%) are worried about the rising costs of living. Greater Manchester results are broadly in line with the national picture, though more residents here report being “very worried” (almost 2 in 5 (39%) compared to 32% nationally).
- Some parts of the population are particularly more likely to be worried about their costs of living. These include parents of children under 5, disabled respondents, those aged 25-34 (all 88%) .

FINANCIAL SITUATION AND BORROWING

- More households have borrowed more money or used more credit in the past month, compared to this time last year. Again, the Greater Manchester rate is higher than nationally - 35% of GM households report having to do so in September. This is substantially higher than the national figure of 22%.
- Almost half of Greater Manchester households would be unable to pay an unexpected but necessary expense of £850, suggesting many could be substantially impacted by rapidly rising interest rates - 43% of households here would not be able to afford to do so, compared to 32% of households nationally.

Cost of living – key findings (2/2)

ENERGY COSTS

- Ahead of the October price cap rise, energy costs were already one of the most significant aspects of hardship. Over half of residents say they are having difficulty being able to afford their energy costs (56%) - Greater Manchester's results are significantly higher than the national average (48%).
- The Greater Manchester figure is even higher for disabled people (67%), those reporting mental ill health (78%) and respondents with a first language other than English (75%).

ACTIONS TAKEN IN RESPONSE TO COST OF LIVING INCREASES

- A majority of local people are already changing their behaviours in response to rising costs – and more than the proportions of residents doing so nationally - 68% in Greater Manchester are spending less on non-essential items (compared to 65% nationally), 61% are using less fuel in the home (55% national), and 56% are spending less on food shopping (national 43%).

WELLBEING

- The cost of living crisis appears to be impacting on people's overall mental wellbeing. In April, 40% of respondents reported high levels of anxiety; this has now increased to 43% - For comparison, the equivalent figure nationally is 36%.

Approach and sample – Cost of living

Approach

This report presents summary findings for survey 3 of the 2022 research study of a representative sample of the Greater Manchester population. The information within this section provides the findings on the cost of living questions. This survey is the first time questions on the cost of living have been asked – as such, there is no tracking or merging of data with previous surveys. The ambition is to have tracked data in future surveys by repeating these questions later in the year. This means that the sample will become larger and more robust and greater analysis of sub-groups will be possible.

Questions of this nature have not been asked of Greater Manchester residents before and as such, these results should be treated as indicative rather than conclusive at this stage – they are used best as indicators to open up further dialogue.

The focus of this research is therefore to provide a growing base of evidence, one which can initially serve as a way to highlight potential trends and indicators which individual Local Authorities can explore in greater detail.

Where possible, data in the Cost of Living section has been compared against the latest survey results from the ONS' national Opinions and Lifestyle Survey. Fieldwork for this national survey is completed fortnightly and so comparisons of the GM survey (fieldwork 1 September – 21 September) have been compared to the ONS results from fieldwork conducted between 31 August and 11 September 2022.

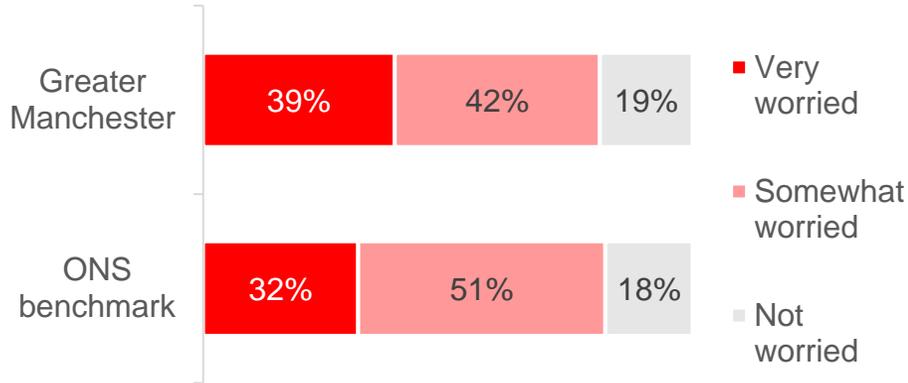
Survey 3 Sample breakdown

Sample info

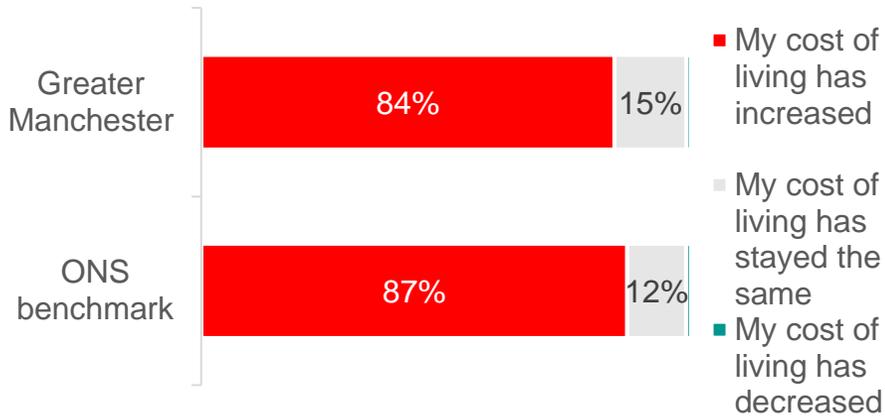
Fieldwork start	1 st September
Fieldwork end	21 st September
Total respondents	1677

Summary: Cost of living

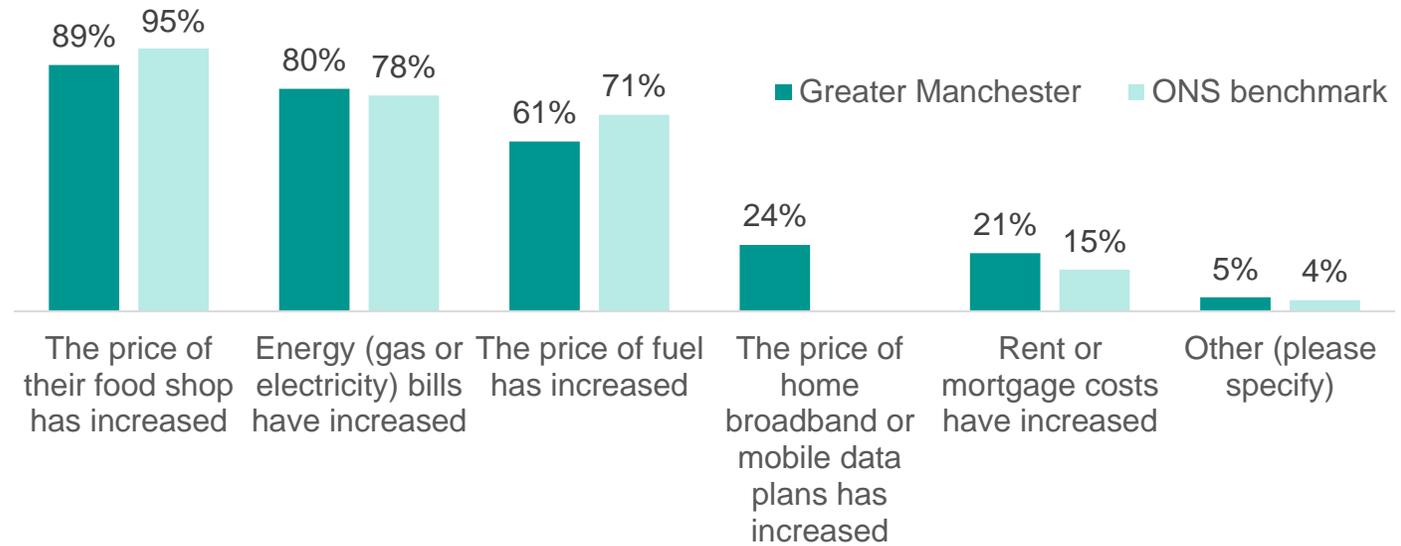
Over 4 in 5 respondents are worried about the rising costs of living...



...and 4 in 5 say their cost of living has increased over the past month



Rises in food, energy, and fuel costs are driving the rise in living costs



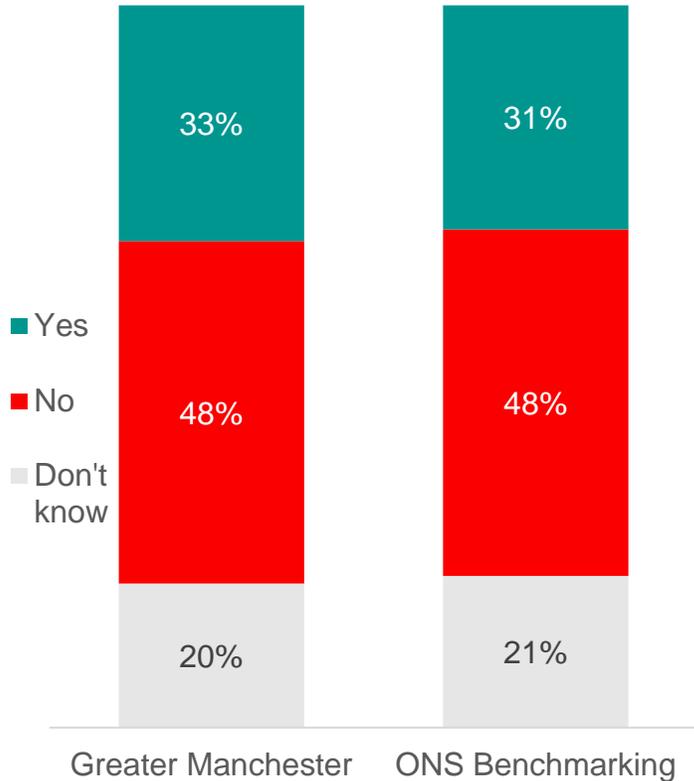
35%
vs. 22% in ONS benchmarking
say they have had to borrow more money or use more credit than usual in the last month, compared to a year ago

- 68%** (65%) spending less on non-essentials
- 62%** (55%) using less fuel in their home
- 56%** (43%) spending less on food shopping / essentials
- 51%** (38%) shopping around more
- 46%** (41%) cutting back on non-essential journeys in their own vehicle

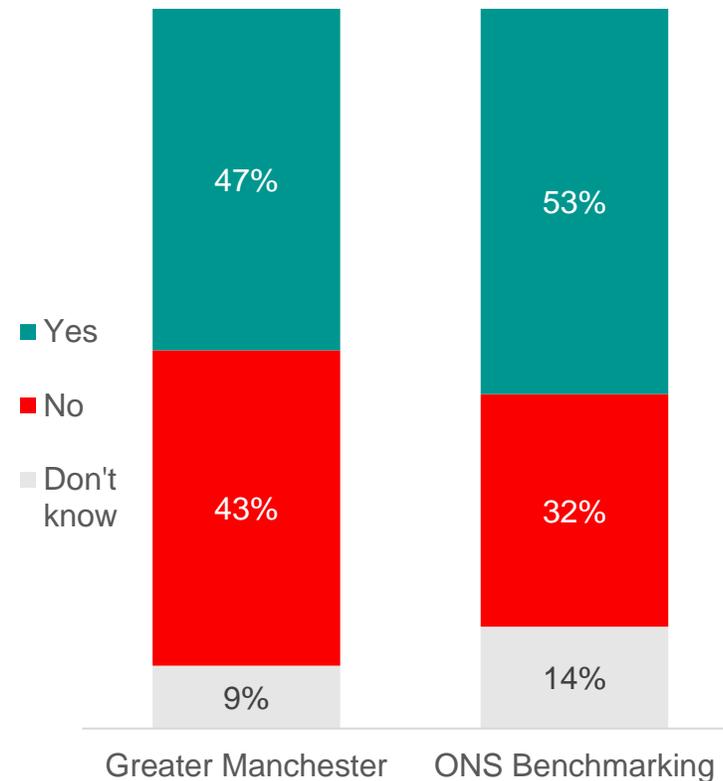
All data is from Survey 3 only. ONS data was published on the 31st August 2022. Unweighted base: 1,677 (All respondents)

Summary: Financial security

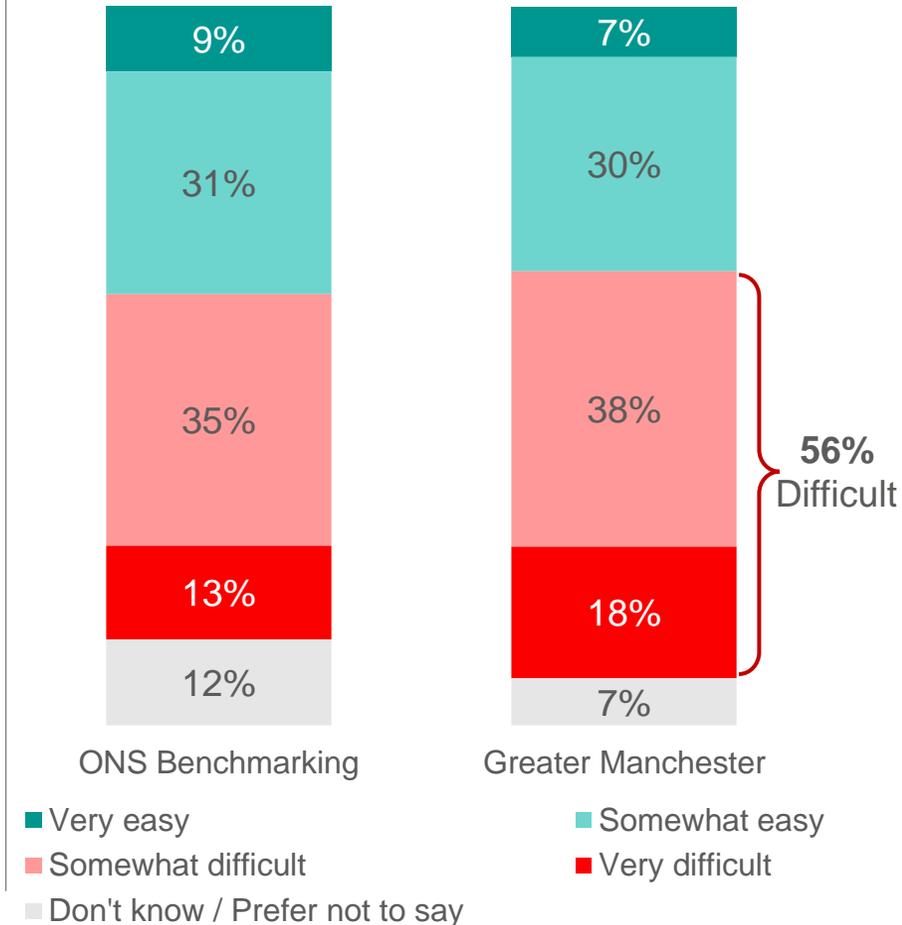
Half of respondents do not think they **will be able to save money** in the next 12 months



Almost equal numbers of respondents say they **would / would not be able to afford** an unexpected, but necessary, expense of £850



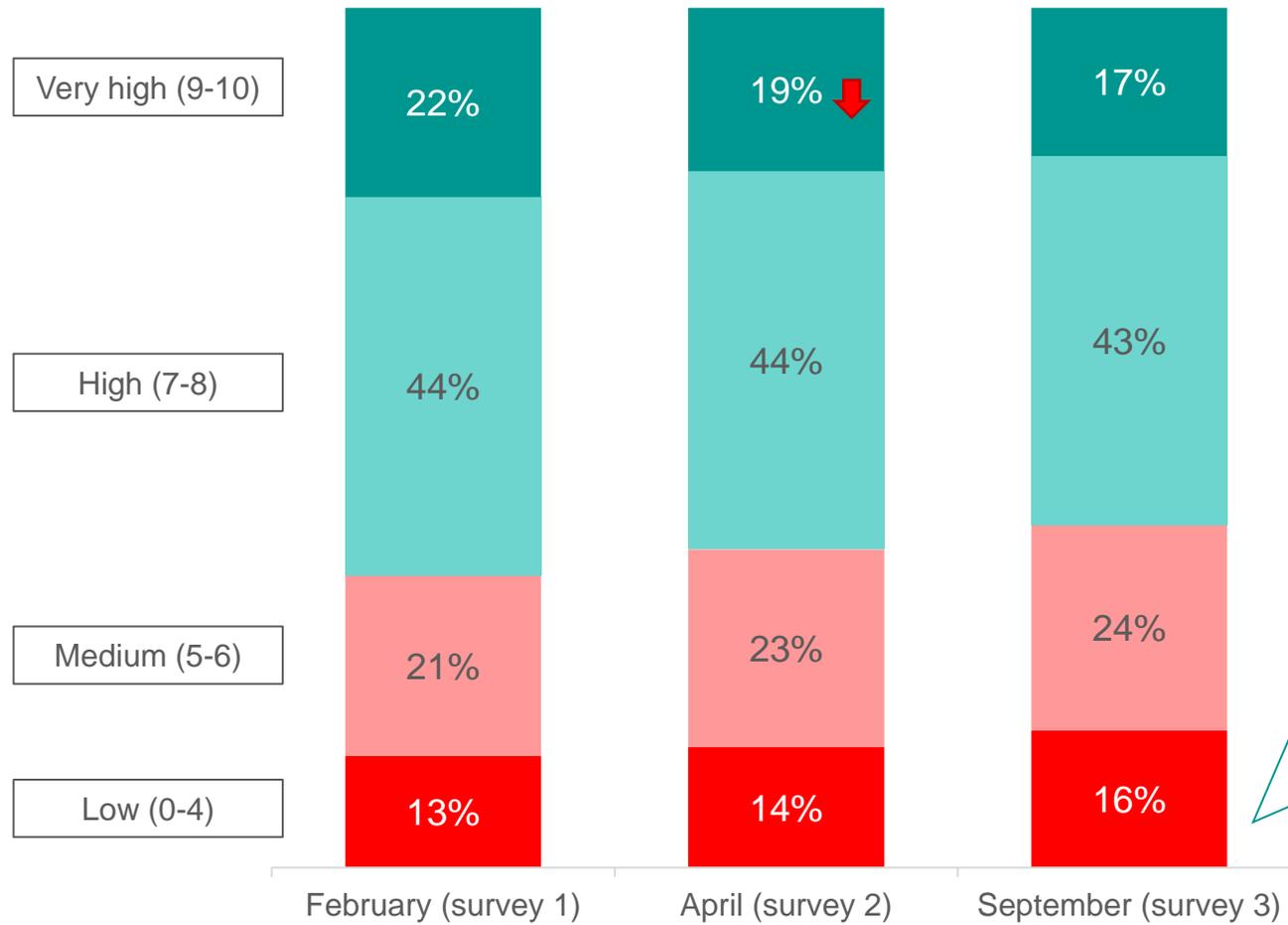
More than half of respondents say it is **difficult** to afford their energy costs



All data is from Survey 3 only. ONS data was published on the 31st August 2022.
Unweighted base: 1,677 (All respondents)

The proportion of respondents who say they have very high **life satisfaction** has slightly decreased since April (17% vs. 19%). Those with lower life satisfaction include disabled respondents and those in financially precarious situations

How satisfied are you with your life nowadays?



% with 'low' life satisfaction higher compared to GM average (16%) among (survey 3)*:

Demographics

- Disabled respondents (29%) including those who have mental ill health (48%), or a mobility disability (30%); or other disability (24%)

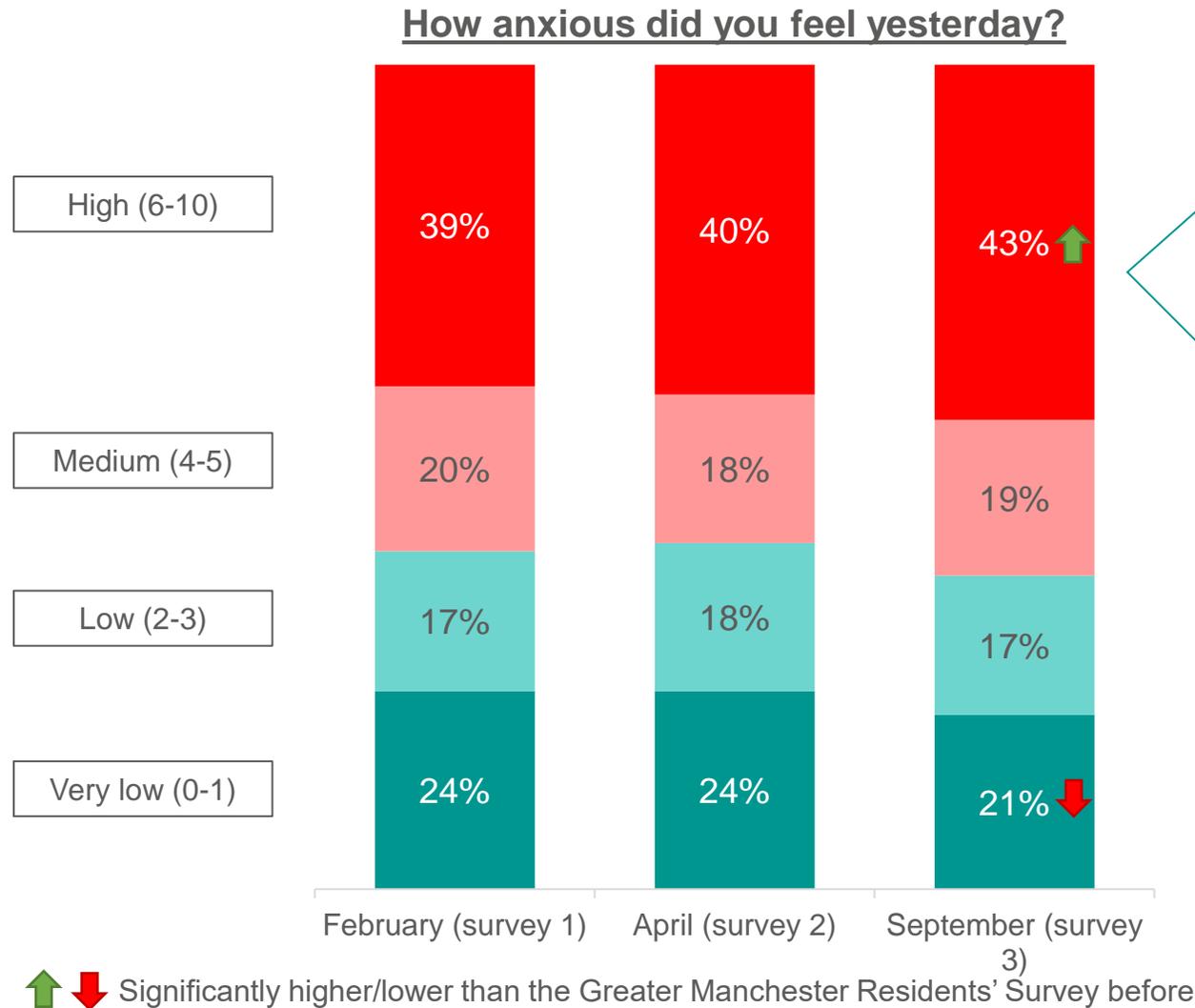
Individual and/or family circumstance

- Those not in work due to ill health or disability (53%)
- Those who have not eaten the whole day for lack of money (30%)
- Those not likely to get either vaccine (28%)
- Those who have not cut the size or skipped a meal (28%)
- Those unable to save money over the next 12 months (23%)
- Those earning up to £15,599 (23%)
- Those not confident using digital services (23%)
- Those who have difficulty in affording energy costs (22%)
- Those who have had to borrow more or use more credit in the past month (21%)
- Those not in employment (20%)

↑ ↓ Significantly higher/lower than the Greater Manchester Residents' Survey before

*Groups with a base size below 50 are not included

Over two fifths (43%) of respondents say they **feel highly anxious**, which has increased slightly since April. Disabled respondents (including those with mental ill health) and those whose first language is not English are more likely to feel anxious



% who felt 'highly anxious' higher compared to GM average (43%) among (survey 3)*:

Demographics:

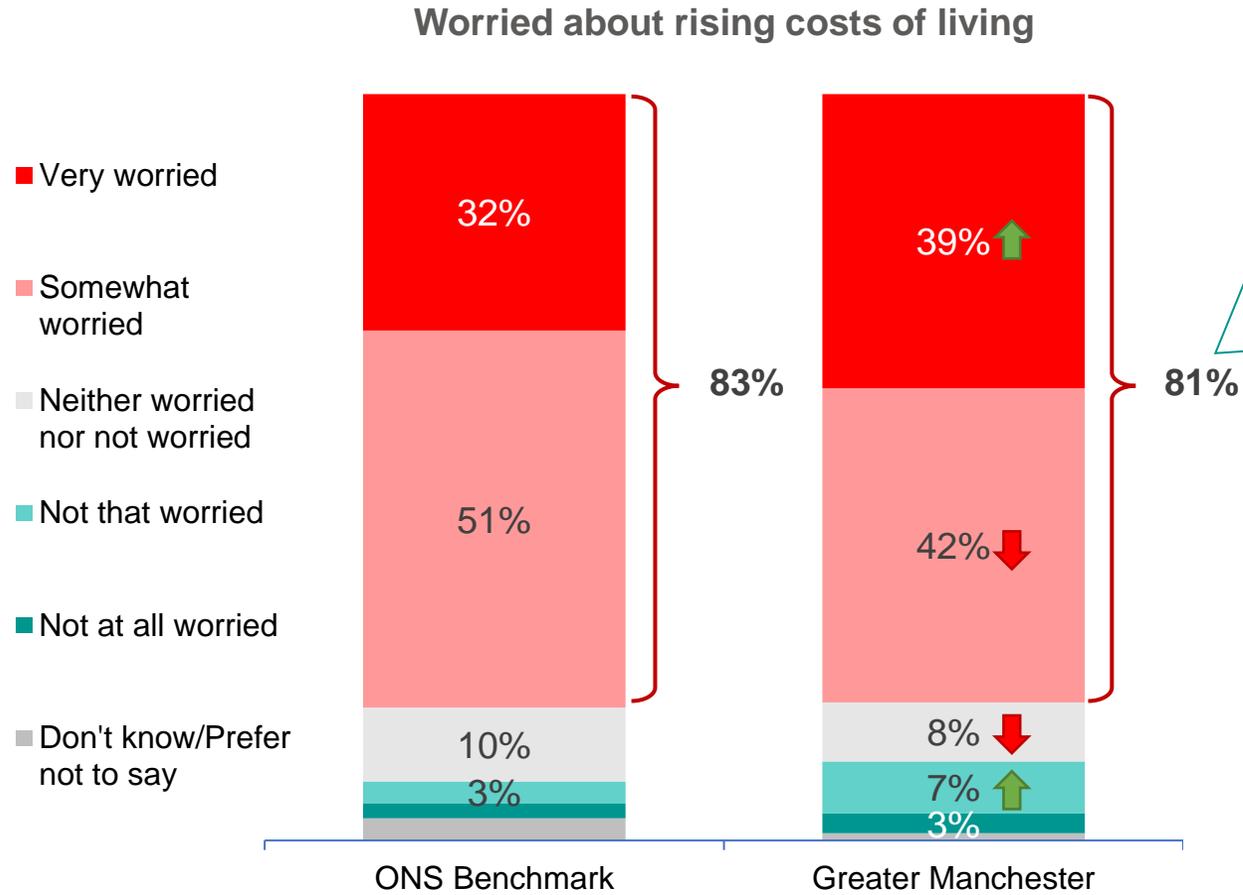
- Disabled respondents (60%), including those with mental ill health (78%), a mobility disability (52%); another type of disability (58%)
- Those whose first language is not English (60%)
- Those who previously had caring responsibilities (59%); those who currently have caring responsibilities (57%)
- Those who are not heterosexual (56%)

Individual and/or family circumstance

- Those who are not in work due to ill health or disability (72%)
- Those who have not eaten all day for lack of money (71%); or have someone in their household who has done so (62%)
- Those who have someone in their household who have cut the size of or skipped a meal (68%); or have done so themselves (64%)
- Those who are worried about Covid-19 (63%)
- Those who are entitled to free school meals (58%)
- Those working from home all the time (57%)
- Those who have had to borrow more or use more credit in the past month (57%)

*Groups with a base size below 50 are not included

Over 4 in 5 (81%) are **worried about the rising costs of living**, with around 2 in 5 (39%) very worried - the latter being significantly higher than elsewhere in the country



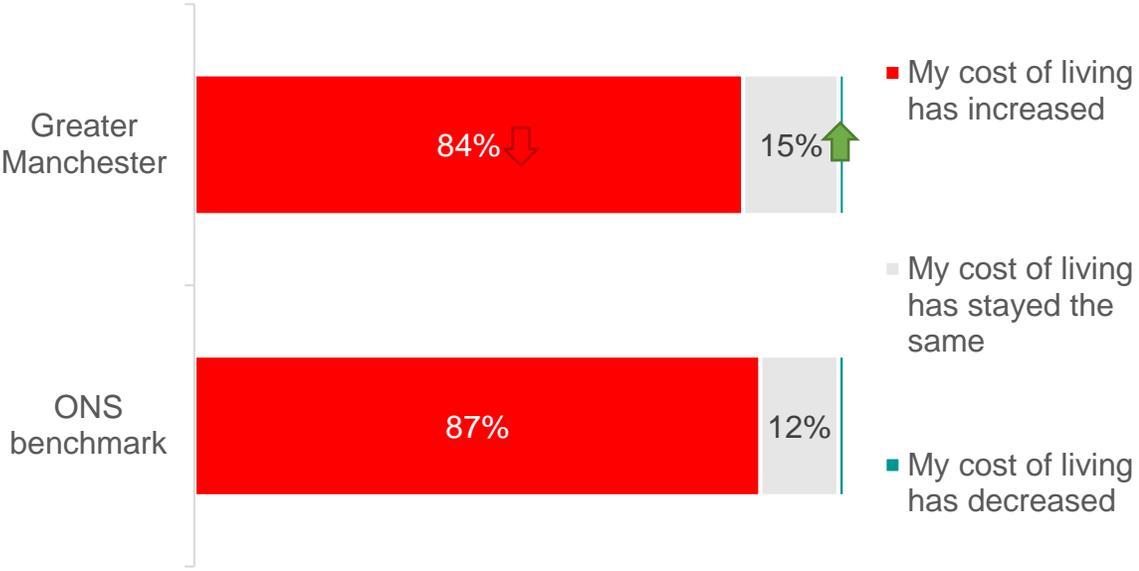
- % who are significantly more likely to feel very / somewhat worried compared to GM average (81%)*:**
- Demographics**
- Parents of children in early years (in nursery, pre-school, or have a childminder) (94%)
 - Disabled respondents (88%); those with mental ill health (93%); mobility disability (88%)
 - Bisexual respondents (93%)
 - Parents (85%); of children under 5 (88%)
 - Females (87%)
 - Those aged 25-34 (88%)
- Individual and/or family circumstance**
- Those not in work due to ill health or disability (95%)
 - Those who find it difficult to afford energy costs (93%)
 - Those who have had to borrow more or use more credit in the next 12 months (92%)
 - Those unable to save money in the next 12 months (92%)
 - Those who have not eaten all day for lack of money (91%)
 - Those worried about Covid-19 (90%)
 - Those earning up to £15,599 (86%)
 - Those whose children are not entitled to free school meals (85%)

↑ ↓ Significantly higher/lower than the ONS Benchmark

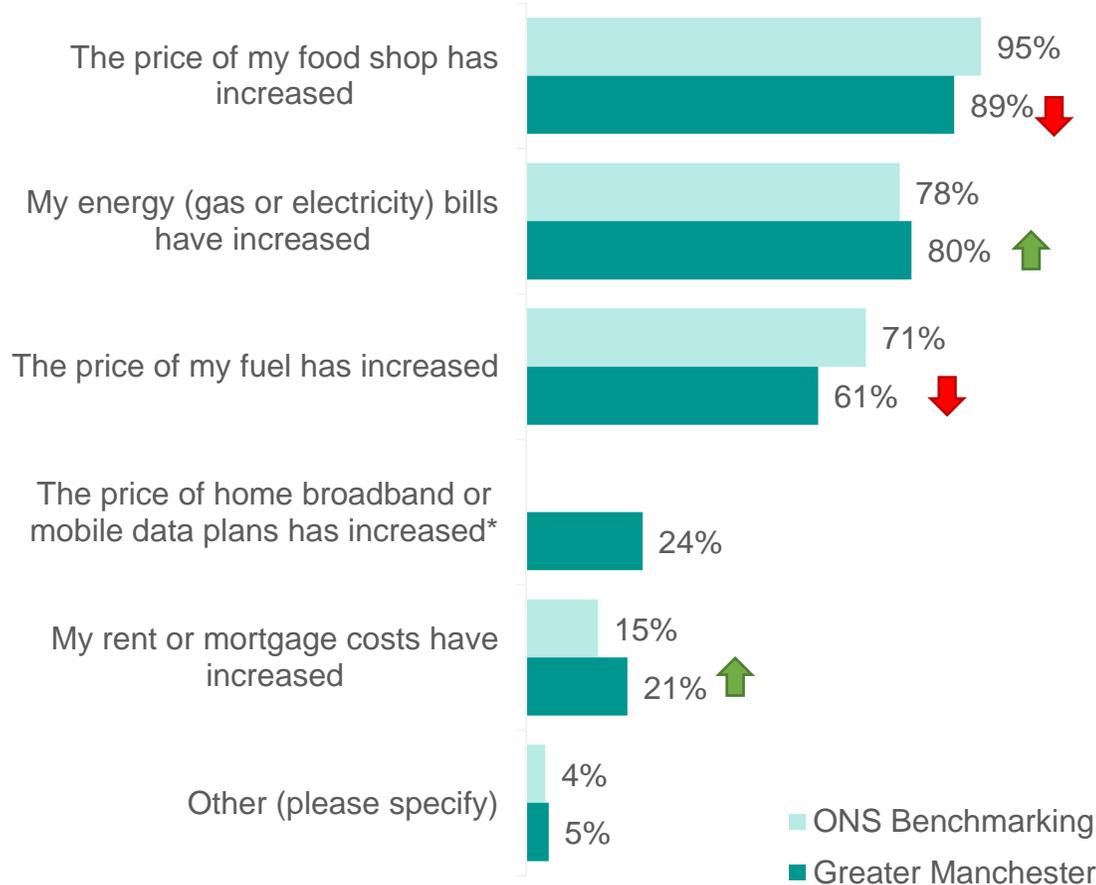
*Groups with a base size below 50 are not included

Over 4 in 5 (84%) respondents say their **cost of living has increased** in the last month, a little lower than the ONS national average but still the vast majority. Food price increases, alongside a rise in energy bills and the price of fuel, are the primary drivers of this rise

Change in cost of living over the last month



Reasons for increase in cost of living (n=1,432)

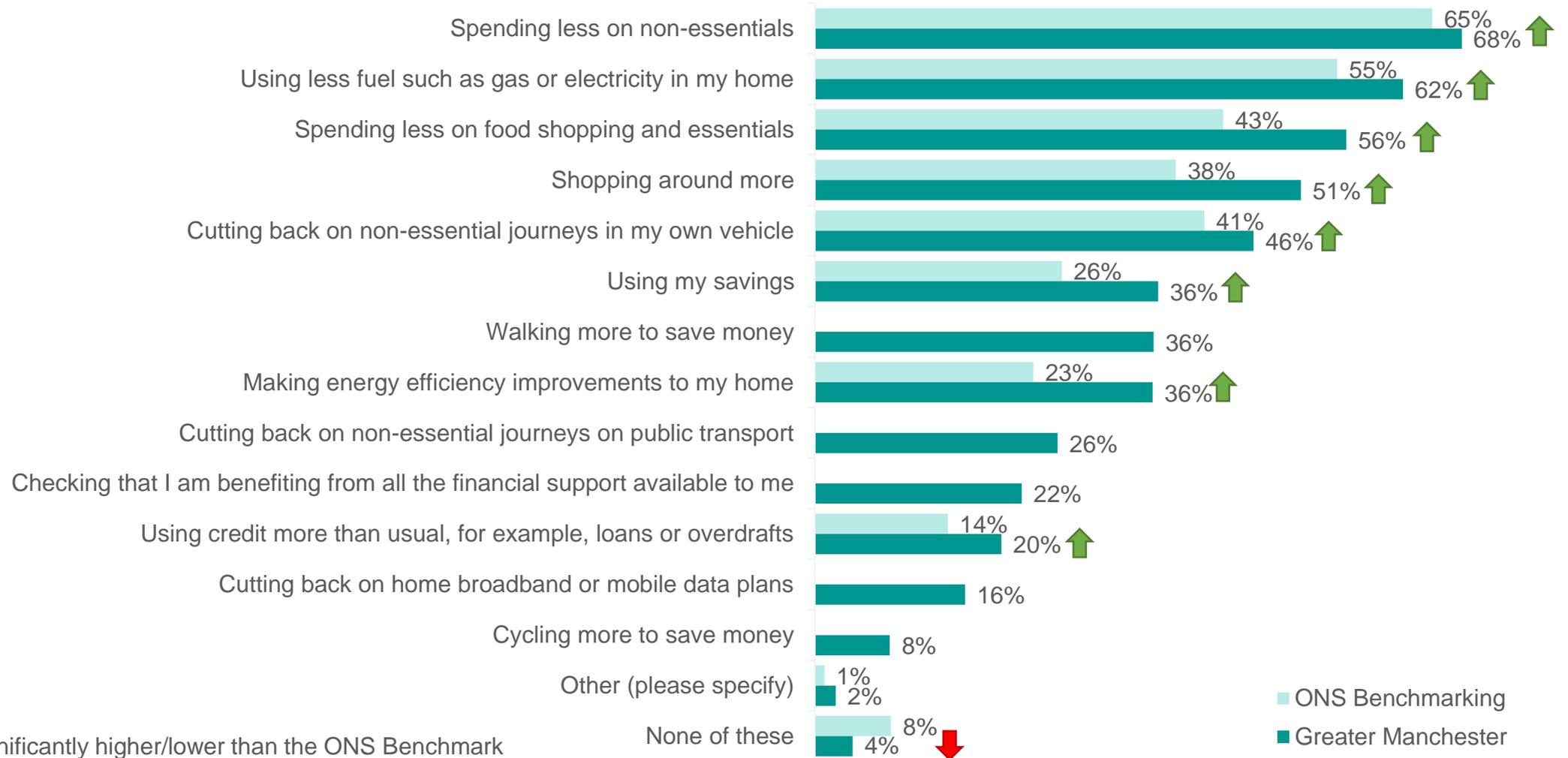


↑ ↓ Significantly higher/lower than the ONS Benchmark

CL5. Over the last month, has your cost of living changed? CL6. Over the last month, for what reasons has your cost of living increased?
 Unweighted base: 1,677 (All respondents); 1,432 (All whose cost of living has increased) *Not asked in the ONS benchmarking

Respondents in Greater Manchester are more likely than the ONS national average to be **taking all actions with regards to combating the rising cost of living**. This includes spending less on non-essential items (68% vs. 65%), or using less energy (62% vs. 55%)

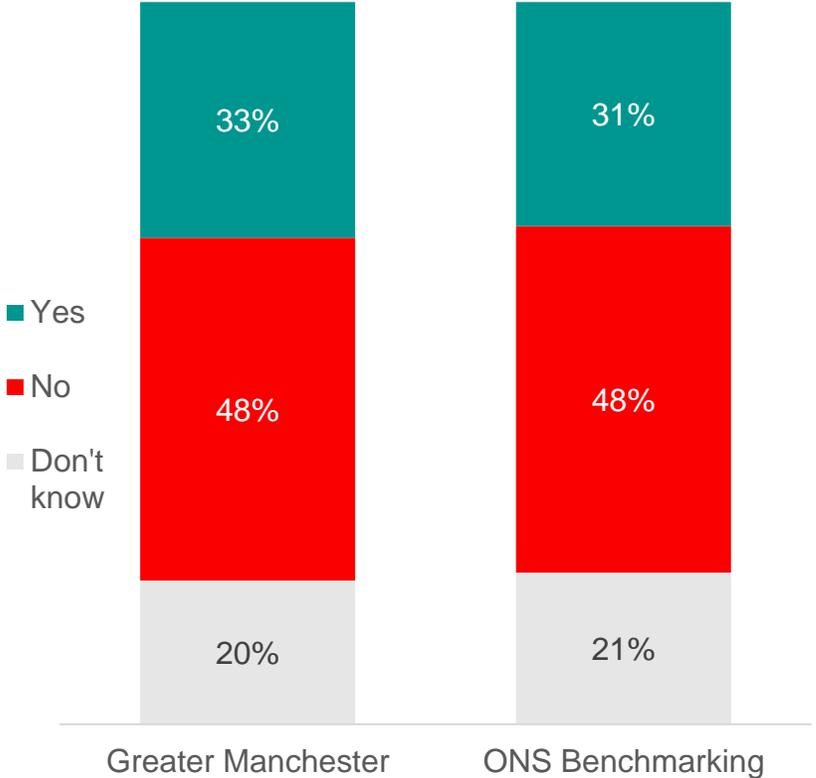
Actions taken due to rise in cost of living (n=1,432)



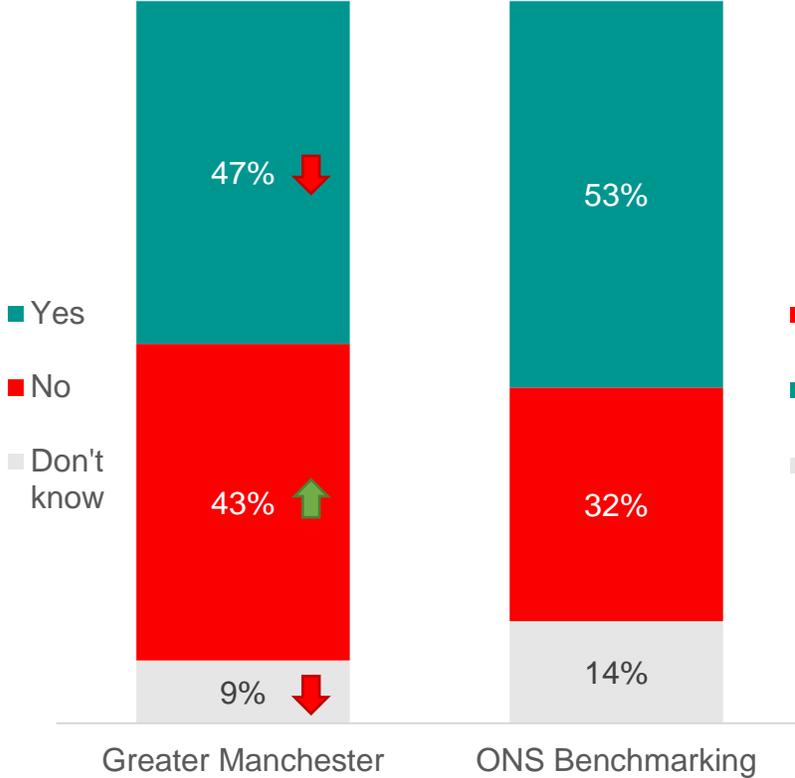
↑ ↓ Significantly higher/lower than the ONS Benchmark

Greater Manchester respondents are less likely than the ONS national average to be able to afford an unexpected expense (47% vs. 53%) and more likely to have borrowed more money in the past month compared to the same time last year (35% vs. 22%)

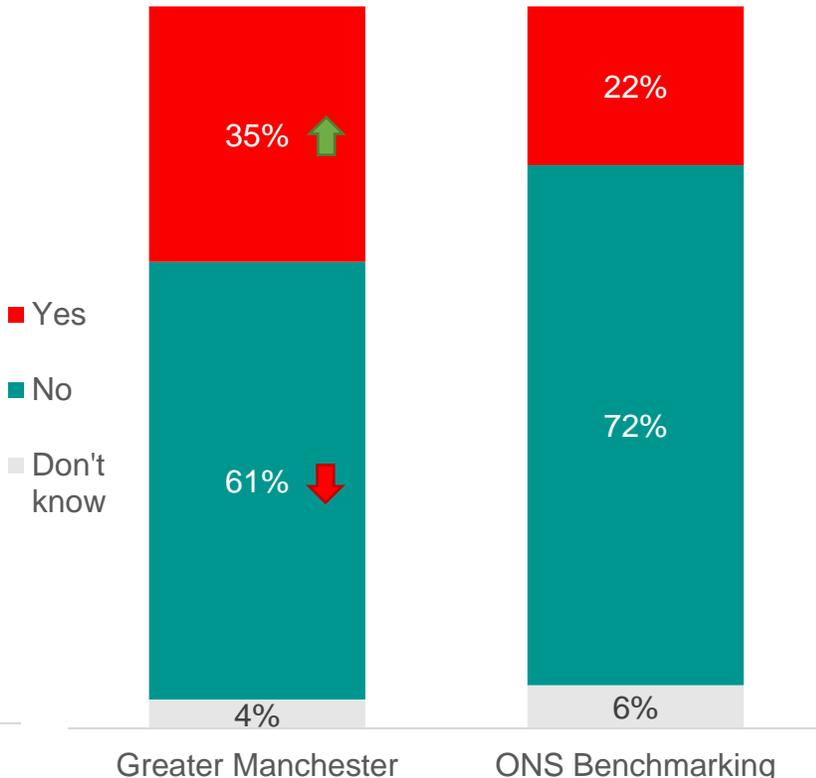
Will you be able to save money over the next 12 months?



Can you afford an unexpected but necessary expense of £850?



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



↑ ↓ Significantly higher/lower than the ONS Benchmark

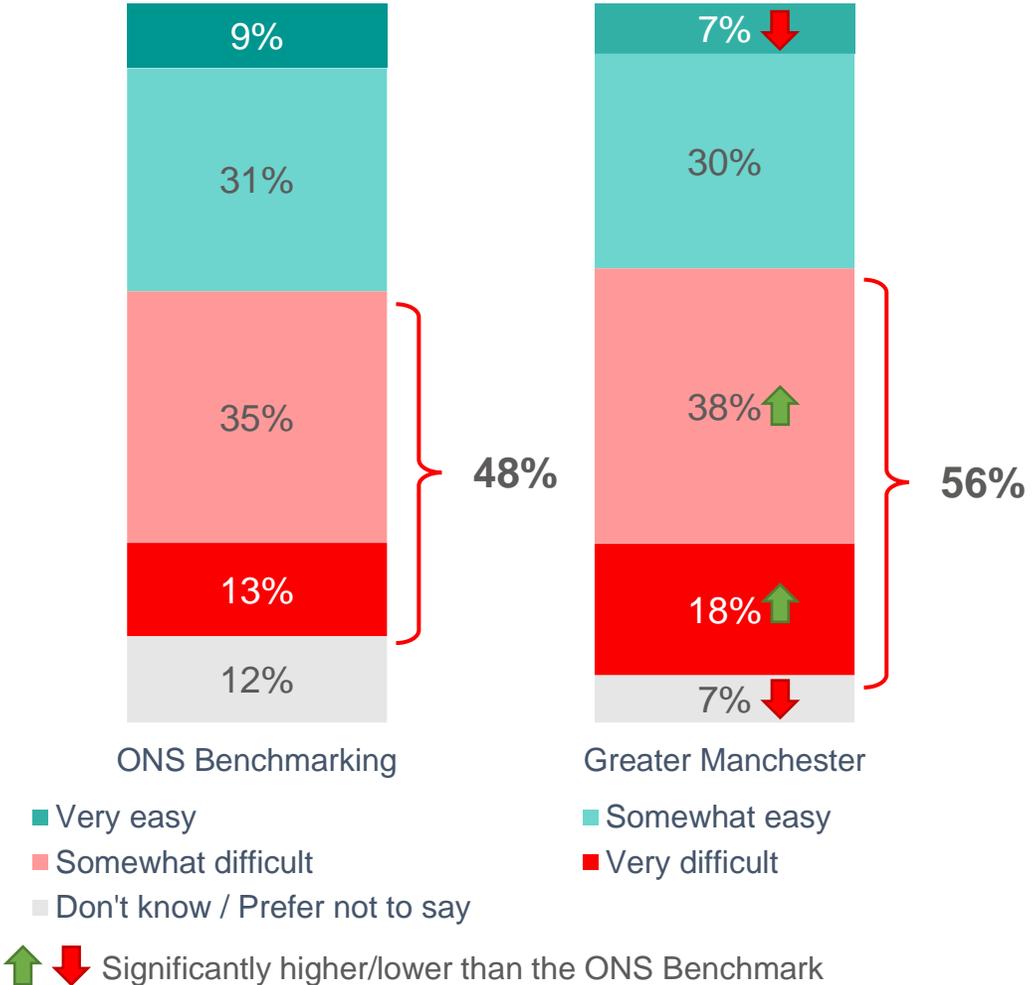
CL1. In view of the general economic situation, do you think you will be able to save any money in the next 12 months? CL3. Have you had to borrow more money or use more credit than usual in the last month, compared to a year ago? CL2. Could your household afford to pay an unexpected, but necessary, expense of £850? Unweighted base: 1,677 (All respondents)

Parents of younger children, respondents from within racially minoritised communities and lower-income backgrounds are more likely to **have borrowed more/used more credit than the same time a year ago**

Borrowed more or used more credit in the past month compared to a year ago*	Cannot afford an unexpected but necessary expense of £850*
<p>Greater Manchester average: 35%</p> <ul style="list-style-type: none"> • Parents of children in early years (67%); in primary school (54%); secondary school (50%) • Those who are bisexual (63%); who are not heterosexual (50%) • Parents (50%); with children under 5 (61%); aged 5-15 (52%); aged 16-17 (49%) • Those with mental ill health (60%) • Those whose first language is not English (59%) • Those from within racially minoritised communities (51%); Pakistani respondents (55%); Muslim respondents (54%); Asian respondents (49%) • Those aged 25-44 (50%) • Those with caring responsibilities (52%) <p>Individual and/or family circumstance</p> <ul style="list-style-type: none"> • Those who have cut the size of or skipped a meal (63%); or someone else in the household has (60%) • Those whose children are entitled to free school meals (63%) • Those who have not eaten all day for lack of money (62%); nor has someone else in their household (50%) • Those who have a prepayment meter (51%); who have opted to switch in the last 12 months (58%); have had for more than 12 months (48%) • Those not in work due to ill health or disability (58%) • Those working from home all of the time (52%) • Those worried about Covid-19 (51%) • Those unable to save money in the next 12 months (47%) 	<p>Greater Manchester average: 43%</p> <ul style="list-style-type: none"> • Disabled respondents (58%); mental ill health (76%); a mobility disability (59%); another type of disability (56%) • Parents of children in early years (61%) • Those whose first language is not English (58%) • Parents with children under 5 (57%) • Those aged 25-44 (54%) • Females (54%) <p>Individual and/or family circumstance</p> <ul style="list-style-type: none"> • Those not in work due to ill health or disability (86%) • Those who have not eaten all day for lack of money (78%) • Those who have cut the size of or skipped a meal (72%); or someone else in the household has (59%) • Those who have had to borrow more or use more credit in the last month (66%) • Those unable to save money in the next 12 months (63%) • Those considering switching to a prepayment meter (63%); those who have had one more than 12 months (56%) • Those earning below the living wage (61%) • Those who find it difficult to afford energy costs (61%) • Those unlikely to get either the Covid-19 vaccine / booster or the flu vaccine (58%) • Those in part-time employment (57%) • Those not confident in using digital services (55%) • Those entitled to free school meals (53%)

Over half of respondents say they are having **difficulty being able to afford their energy costs (56%)**, significantly higher than the national average. Parents and disabled respondents are among those more likely to find it difficult

Ease of affording energy costs



% who are significantly more likely to find it very/somewhat difficult to afford their energy costs compared to GM average (56%)*:

Demographics

- Disabled respondents (67%); mental ill health (78%); with a mobility disability (68%); or other disability (67%)
- Those whose first language is not English (75%)
- Pakistani respondents (74%); Muslim respondents (71%)
- Parents of children in early years (68%); primary school (66%)
- Parents of children aged 19-25 (67%)

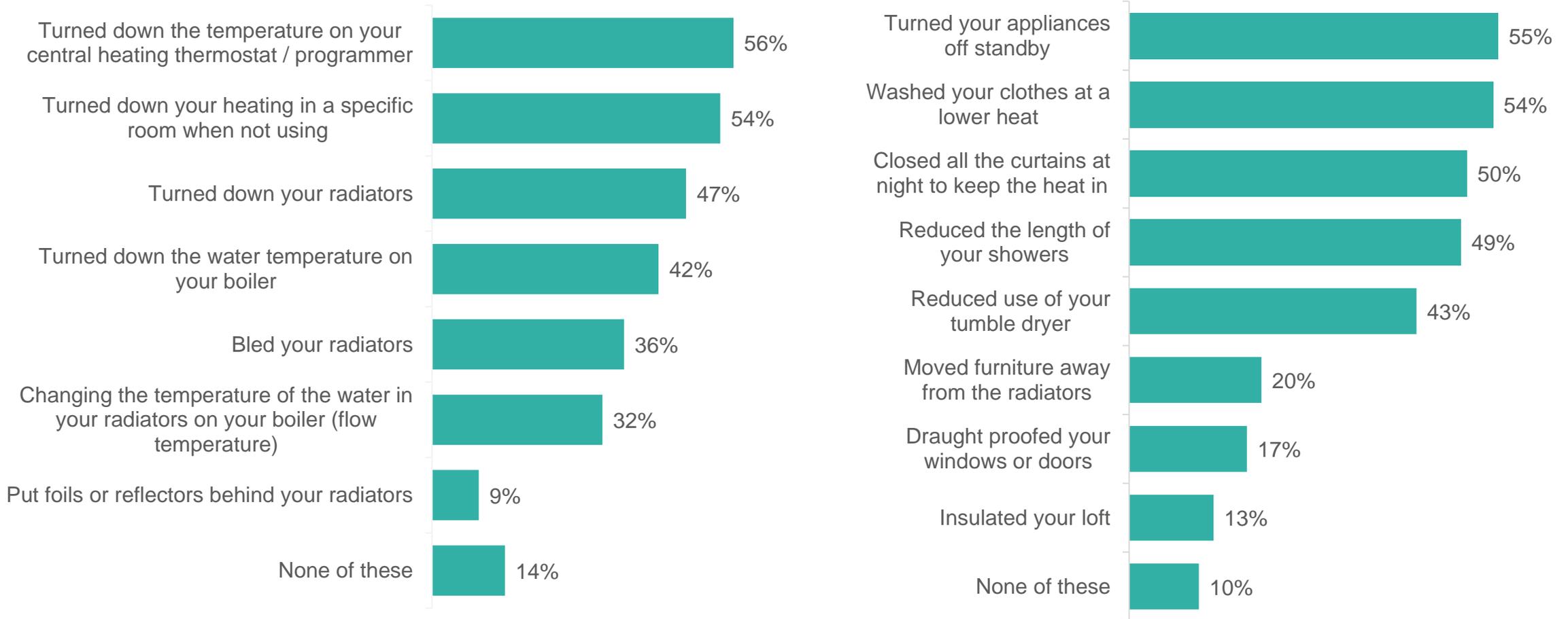
Individual and/or family circumstance

- Those not in work due to ill health or disability (87%)
- Those who have cut the size or skipped a meal (78%); or have someone else in the household has done so (77%)
- Homemakers (78%)
- Those unable to save money in the next 12 months (77%)
- Those earning up to £15,599 (75%)
- Those who have had to borrow more or use more credit in the past month (74%)
- Those who have not eaten the whole day for lack of money (74%); nor has someone else in their household (71%)
- Those considering switching to a pre-payment meter (73%)
- Those not confident in using digital services (70%)
- Those whose children are entitled to free school meals (66%)

*Groups with a base size below 50 are not included

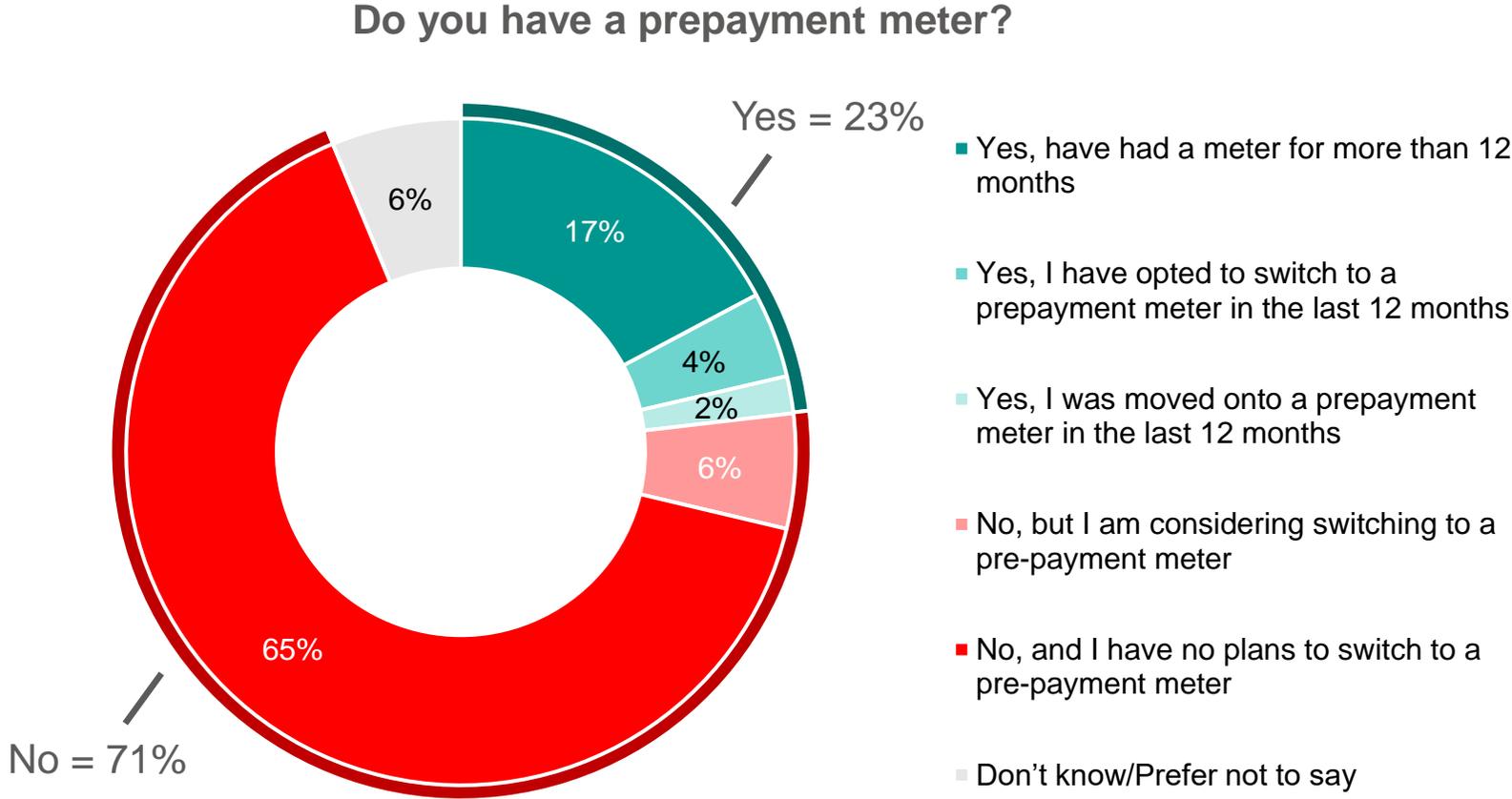
Over half of respondents have **attempted to reduce the energy that they are using** in their homes by turning down their heating and electricity (56%) or turning off appliances (55%)

Actions taken over the past year (actions displayed across two graphs due to being asked in separate batches)



CL10. In the past year, which of these have you done? CL11. In the past year, which of these other actions have you done?
Unweighted base: 1,677 (All respondents)

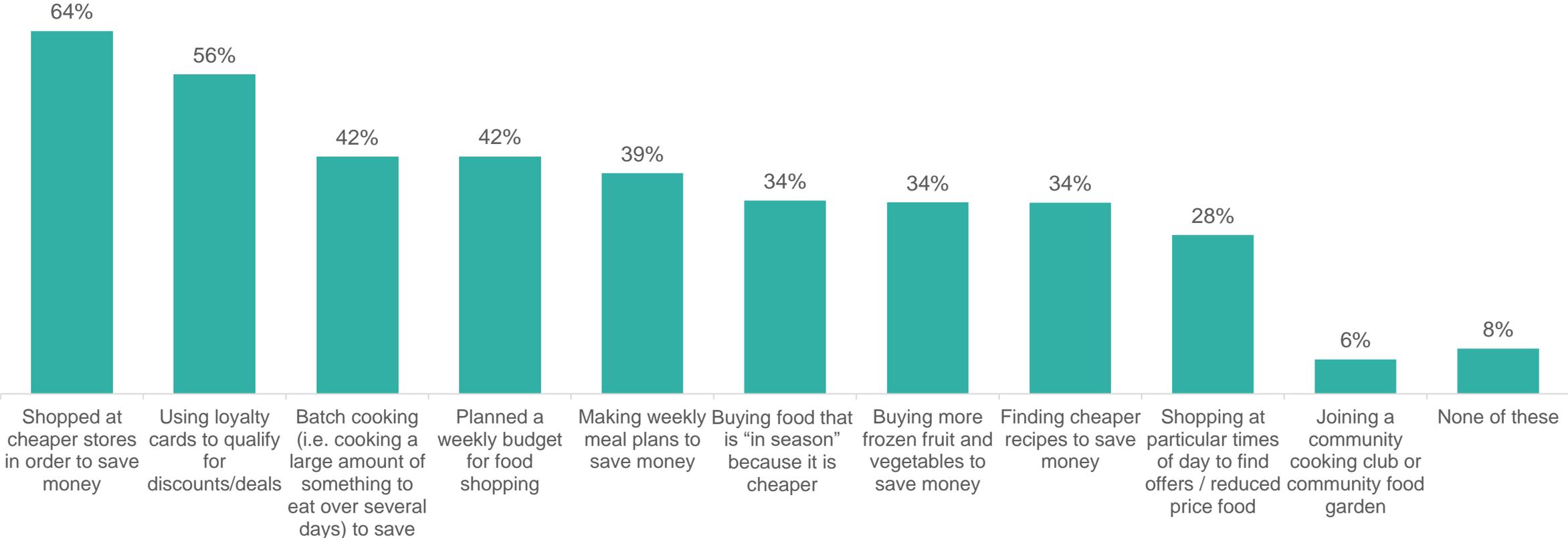
Survey responses suggest a gradual increase in the proportion of GM residents with a **prepayment meter** (23% now, compared to 17% twelve months ago).



- **4% of respondents have opted to switch to a prepayment meter in the last 12 months, with a further 2% having been moved onto a meter in the same period.** The combined effect of this, according to the survey, is that nearly a quarter of GM residents may now have a prepayment meter (if survey results reflect the population at large on this measure).
- Although prepayment meters can help with budgeting (preventing some customers from getting into debt and helping others pay off debts in smaller increments), **households with a prepayment meter will typically pay their supplier's standard rate for their gas and electricity, there are specific implications around standard charges, and a range of other disadvantages.**

Almost two thirds (64%) of respondents are **shopping in cheaper stores**, whilst over half are using loyalty cards to access discounts or deals (56%)

Actions taken over the past year



This question was asked in the Greater Manchester Residents' Survey to support the work of the Food Security Action Network, but was not asked nationally by the ONS

CL12. And for one last set of actions, in the past year, which of these have you done?
Unweighted base: 1,677 (All respondents)

Almost a quarter of respondents would like to **hear about the support available** for using loyalty cards to qualify for discounts and deals (24%) and buying in-season food (23%). A fifth want support with meal plans, shopping at cheaper stores or joining a community cooking club (20%)

Do you plan on doing any of these actions in the next two months?

	Want support	Yes – and I would like support	No – But I would like to hear about support available	Yes – But I don't need support	No – And I don't need support	Not sure
Using loyalty cards to qualify for discounts/deals (n=731)	24%	19%	5%	27%	37%	13%
Buying food that is “in season” because it is cheaper (n=1,109)	23%	16%	7%	30%	35%	12%
Making weekly meal plans to save money (n=1,026)	20%	15%	5%	25%	44%	11%
Shopped at cheaper stores in order to save money (n=609)	20%	14%	5%	29%	41%	10%
Joining a community cooking club / community food garden (n=1,574)	20%	9%	11%	8%	59%	14%
Shopping at particular times of day to find offers / reduced price food (n=1,206)	19%	12%	7%	21%	49%	12%
Batch cooking to save money (n=980)	18%	12%	6%	29%	41%	12%
Finding cheaper recipes to save money (n=1,115)	16%	10%	6%	29%	42%	12%
Planned a weekly budget for food shopping (n=979)	16%	11%	4%	31%	43%	10%
Buying more frozen fruit and vegetables to save money (n=1,114)	15%	9%	7%	26%	47%	12%

Parents, especially those with young children, those within racially minoritised groups and (as expected) those in financially precarious situations are more likely to want to **hear or get support for cost-saving actions**

Support for: using loyalty cards to qualify for discounts/deals (n=731)*	Support for: buying food that is “in season” because it is cheaper (n=1,109)*	Support for: making weekly meal plans to save money (n=1,026)*
<p>Greater Manchester average: 24%</p> <ul style="list-style-type: none"> • Those with children under 5 years old (44%), 5-15 years old (34%) • Those from within racially minoritised communities (40%) • Parents of children in primary school (40%); in secondary school (33%) • Those with caring responsibilities (39%) • Those aged 25-44 (36%), 16-24 (35%) <p>Individual and/or family circumstance</p> <ul style="list-style-type: none"> • Those where someone else in the household has cut the size of or skipped a meal (51%), or have cut the size or skipped a meal themselves (39%) • Those who have not eaten all day for lack of money (47%) • Those earning up to £10,399 (42%) • Those with a pre-payment meter in their home (40%); have had one for more than a year (38%) • Those who have had to borrow more or use more credit in the last month (40%) • Those whose children are not entitled to free school meals (33%) • Those in full time employment (30%) • Those who find it difficult to afford energy costs (30%) 	<p>Greater Manchester average: 23%</p> <ul style="list-style-type: none"> • Those from within racially minoritised communities (41%); Asian respondents (46%) • Those aged 18-24 (40%); 16-24 (37%); 25-44 (27%) • Parents (29%); of children under 5 (38%) • Parents of children in early years (37%); in primary school (30%) • Those with caring responsibilities (32%) • Females (27%) <p>Individual and/or family circumstance</p> <ul style="list-style-type: none"> • Those who have not eaten all day for lack of money (45%); nor has someone else in their household (36%) • Those earning up to £10,399 (44%) • Those with a pre-payment meter in their home (41%); have had one for more than a year (36%) • Those where someone else in the household has cut the size of or skipped a meal (41%), or have cut the size or skipped a meal themselves (40%) • Those whose children are entitled to free school meals (40%) • Those who have had to borrow more or use more credit in the last month (39%) • Those not confident in using digital services (37%) • Those earning below the Real Living Wage (34%) 	<p>Greater Manchester average: 20%</p> <ul style="list-style-type: none"> • Those aged 18-24 (53%); 16-24 (45%); 25-44 (27%) • Those with children under 5 (50%); 5-15-year-olds (32%) • Those from within racially minoritised communities (37%); Asian respondents (39%) • Parents (32%); of children in primary school (37%); secondary school (27%) • Those with another type of disability (34%); mental ill health (32%) • Those with caring responsibilities (34%) <p>Individual and/or family circumstance</p> <ul style="list-style-type: none"> • Those who have not eaten all day for lack of money (50%) • Those who have cut the size of or skipped a meal (44%); or someone else in the household has (43%) • Those whose children are entitled to free school meals (44%) • Those who have had to borrow more or use more credit in the last month (40%) • Those with a pre-payment meter in their home (39%); have had one for more than a year (35%) • Those earning below the Real Living Wage (35%) • Those not confident in using digital services (34%) • Those in part-time employment (29%)

CL13. Do you plan on doing any of these in the next two months, and would you like support in doing this?
 Unweighted base: 731 – 1109 - 1026 (All who have not done any of these actions)*Groups with a base size below 50 are not included

Digital inclusion – telephone sample only

Key findings

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Digital inclusion – key findings

- **OVER A THIRD EXPERIENCE DIGITAL EXCLUSION** – 36% of respondents noted that their household experienced some form of digital exclusion. This is in comparison to around 28% in Spring 2022.*
- **PEOPLE ARE LESS LIKELY TO BE ABLE TO AFFORD INTERNET CONNECTIVITY** – One aspect of digital exclusion is an inability to afford access to connectivity. In Spring, around 93% of households were able to afford internet connectivity most or all of the time. That has now fallen to 87% of households in September.*
- **DISABLED PEOPLE AND OLDER RESIDENTS CONTINUE TO BE MORE LIKELY TO EXPERIENCE DIGITAL EXCLUSION** – Different groups are impacted by digital exclusion in different ways:
 - Disabled people are less likely to be able to afford digital connectivity (76% compared to 87% across the city region)...
 - ...while older respondents (especially those aged 75+) are less likely to have access to the devices and skills they need to be online.
- **USE OF THE INTERNET** – Use of the internet across a range of digital services is mostly consistent with the Spring. However there are significant declines in the proportion of respondents who are looking online for public services information or listening to live or catch-up radio.

* Changes in question approach throughout this section may have had an impact on this increase. Differences should be treated with a degree of caution until surveys 4 and 5 have confirmed whether this trend is real or influenced by the impact of this change of approach.

Approach and sample – Digital inclusion

Approach

This report presents summary findings for survey 1, 2, and 3 of the 2022 research study of a representative sample of the Greater Manchester population. In this section the samples for the first two surveys conducted in Spring 2022 have been merged to provide a more robust sample size for sub-group analysis. This has then been compared to the results from survey 3, conducted in September 2022.

In this section only the responses of the telephone sample are presented. The telephone methodology was selected to ensure that the sample is not influenced by respondents taking the survey online, who are by definition digitally included. However the resulting constraints of sample size mean that insights are less robust. There is a particular focus on over 75 year olds, under 25 year olds, and disabled people as priority groups for GM activity to address digital exclusion, and where possible this information has been presented.

Questions of this nature have not been asked of Greater Manchester residents before and as such, these results should be treated as indicative rather than conclusive at this stage – they are best used as indicators to open up further dialogue.

The focus of this research is to provide a growing base of evidence, one which can initially serve as a way to highlight potential trends and indicators which individual Local Authorities can explore in greater detail. As this evidence base grows across multiple surveys we will be able to provide greater depth on which groups are likely to be more affected by the issues explored, highlighting those where more investigation would prove useful.

On some questions responses have been filtered further and bases may be lower than the full sample of 250 in some instances. Where relevant, this has been noted on the slides, along with the unweighted base sizes.

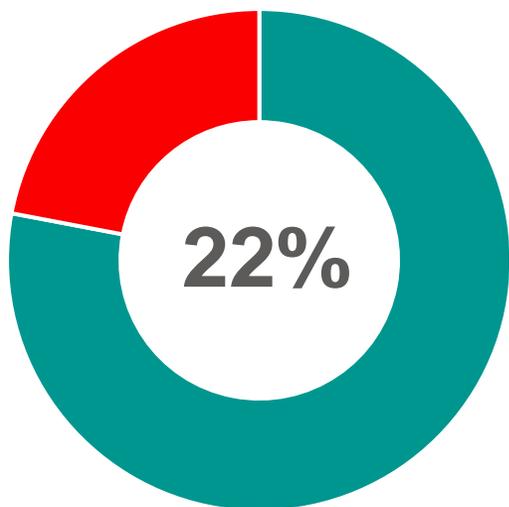
Survey 3 Sample breakdown

Sample info	
Fieldwork start	1 st September
Fieldwork end	21 st September
Total respondents	1677
Telephone respondents	235
Aged 16-24 (telephone)*	11
Aged 75+ (telephone)**	49
Disabled (telephone)	54

*In survey 3 the base size for this group is too small to allow detailed analysis. Results of 3 and 4 will be merged to provide a base size robust enough for sub group analysis

** Because they are a priority group, over 75s have been included in sub-group analysis, despite not quite reaching a base size of 50

Summary: Digital Inclusion



Someone in the household (respondent or others) is not confident in using digital services online

Over one in five respondents are not confident someone in their household can use the digital services they need and wants online. Including...

tbc

54%

45%

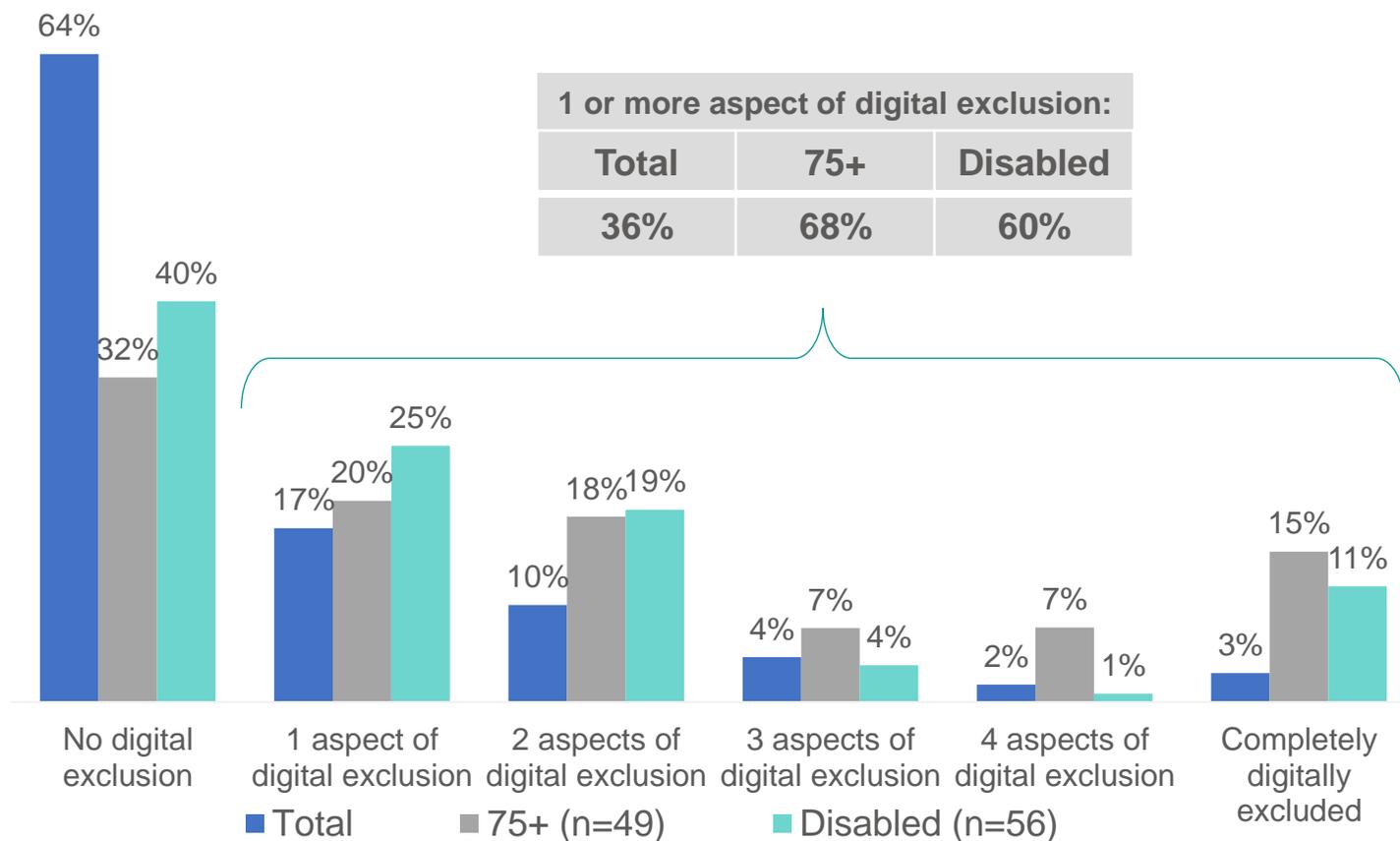
Aged 16-24*

Aged 75+

Disabled respondents

Over a third of respondents have selected that either they or someone else in their household is digitally excluded in some way. This rises to six-in-ten for disabled respondents and almost seven-in-ten for respondents aged 75+

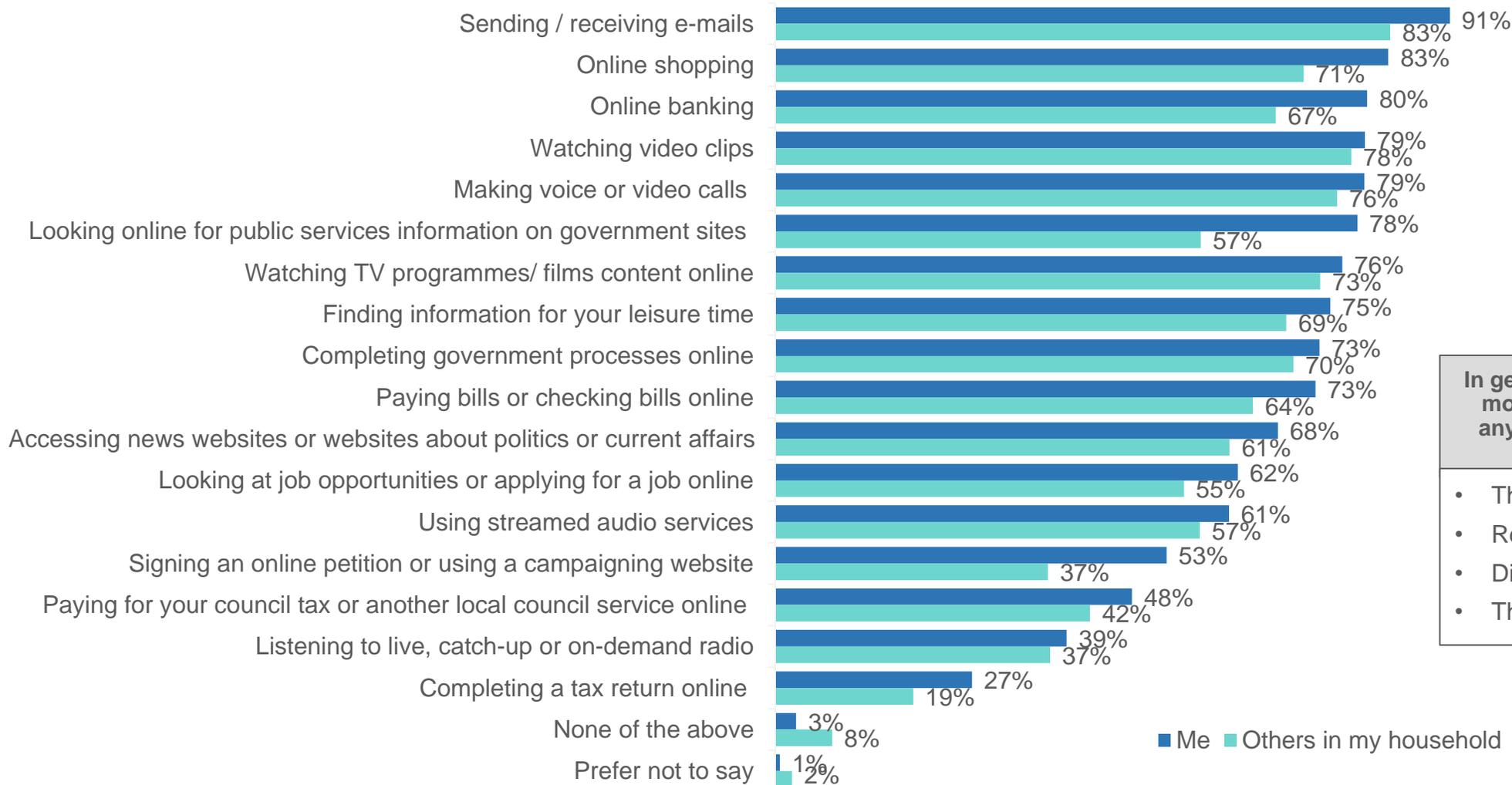
Number of aspects of digital exclusion experienced



* Under 25s base is too low to provide sub-group analysis. This figure will be confirmed by merging survey 3 and 4 of the series
Unweighted base: 235 (Telephone respondents)

Respondents are more likely to say they personally **do any activity online than others in their household. Those aged 65+, retired people, disabled respondents, and those not in employment are more likely than GM respondents overall to not do any activities online**

Online activities completed



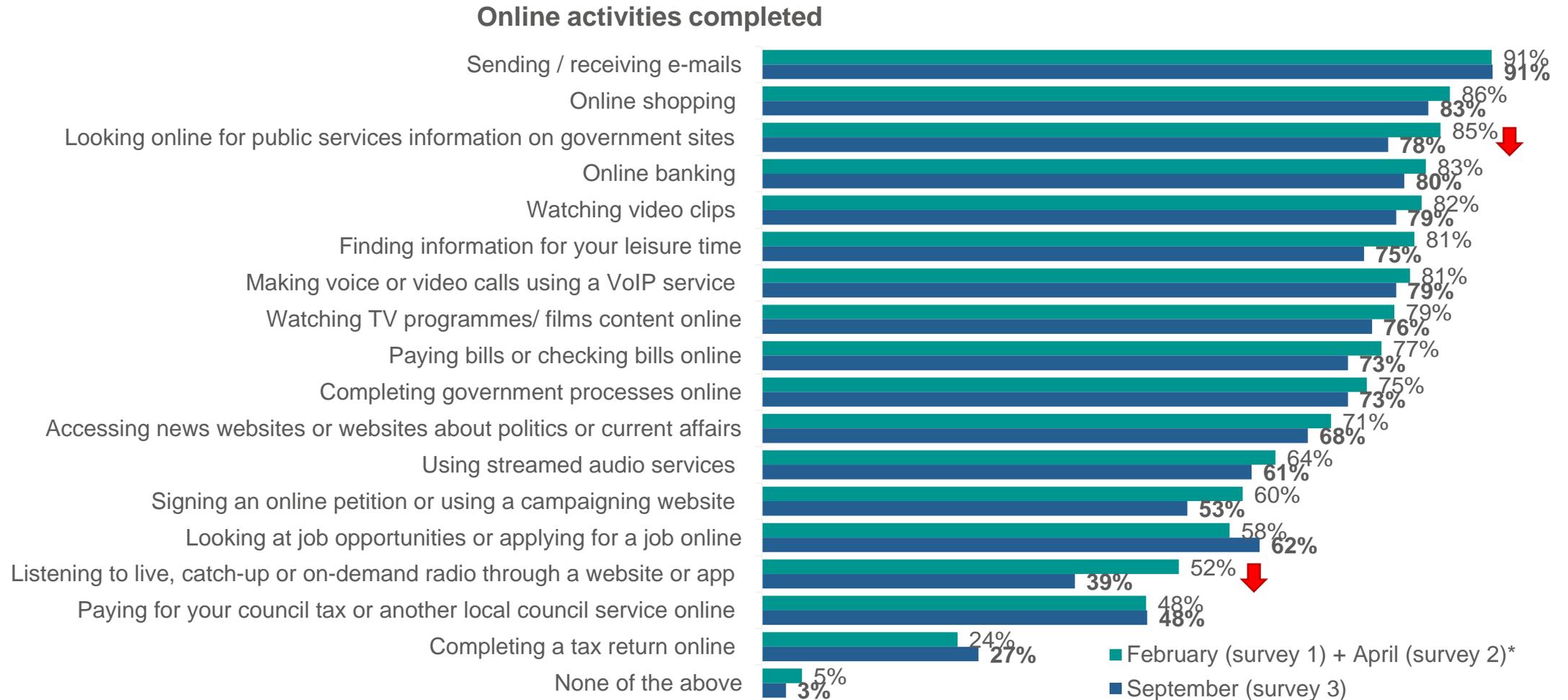
In general the following groups are more likely personally not to do anything online (vs. GM average 3%)*

- Those aged 75+ (26%)
- Retired respondents (13%)
- Disabled respondents (8%)
- Those not in employment (8%)

DI9. Which of these have you ever done online? *Question in W3 was asked as a grid, between “you” and “others in your household”, in previous surveys it had been asked collectively as “your household”.

Unweighted base: 235 (Telephone respondents)

Respondents are less likely than they were in Spring to be **looking online** for public services information (85% vs 78%), or listening to live or catch-up radio (52% vs 39%)



↑ ↓ Significantly higher/lower than survey 1+2

Over 1 in 5 respondents say they (17%) are **not confident using digital services online**. 16% say that others in their household are not confident in doing this. Those more likely to not be confident are aged 75+, are disabled, or are 1 person households

How confident are you in using digital services online?



Respondents in the telephone sample more likely to be not very/not at all confident in using digital services online (vs. 17% GM average):

- Those aged 75+ (44%)
- Disabled respondents (31%)
- Retired respondents (31%)
- 1 person households (28%)
- Those without children under 25 (23%)

Respondents in the telephone sample whose household is less likely to be quite confident/very confident in using digital services online (vs. 16% GM average):

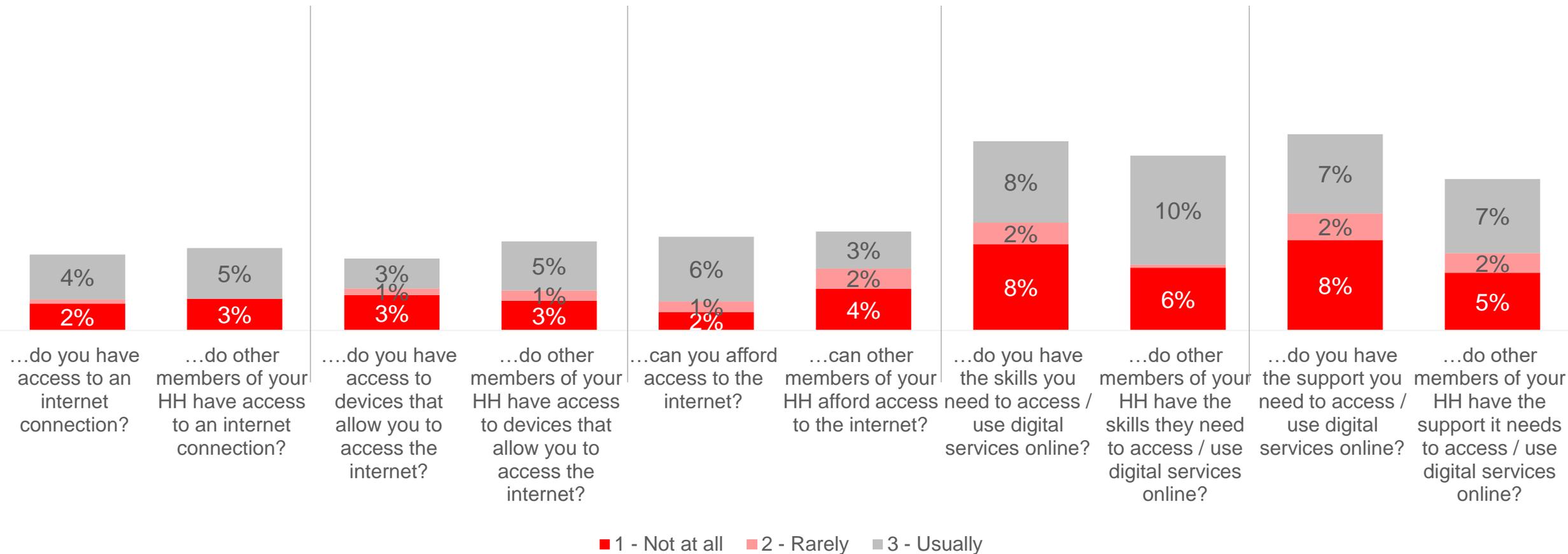
- Those aged 65+ (35%)
- Retired respondents (29%)

	February (survey 1) + April (survey 2)	September (survey 3)
Household is not confident (s3 – you or others = not very + not at all)	7%	22%
Household is confident (s3 – you + others = very + quite)	92%	78%

DI10. Overall, how confident is your household in using the digital services online that it needs and wants? *Question in S3 was asked as a grid, between you and others in your household. For tracking purposes this has been combined to understand if either “you” or “others” did not have consistent access or support all or most of the time. This change in approach means any differences between surveys could be due to the change in question wording. Unweighted base: 235 (Telephone respondents)

If respondents are experiencing digital exclusions, they are most likely to say that their household is digitally excluded **due to a lack of skills or support** to allow them to access digital online services

How often...? (Only showing % who are unable to use online service all/most of the time)*



Disabled respondents or those aged 75+ are far more likely to not have **access or the skills and support** to get online all or most of the time

How often do you/do others in your household...? (Showing % of households without the access/skills to get online all/most of the time)

	Total	Disabled respondents (n=56)	Aged 75+ (n=49)
...have consistent and reliable access to an internet connection at home?	9%	17%	25%
...have consistent and reliable access to devices that allow access to the internet and use digital services online?	9%	16%	31%
...can afford access to the internet?	10%	27%	23%
...have the skills they need to access and use digital services online?	23%	46%	66%
...have the support needed to access and use digital services online?	19%	29%	37%

Respondents are just as likely as they were in Spring to have **consistent access to an internet connection or devices to get online**. However, they are slightly less likely to be able to afford access or to have the skills they need to get online

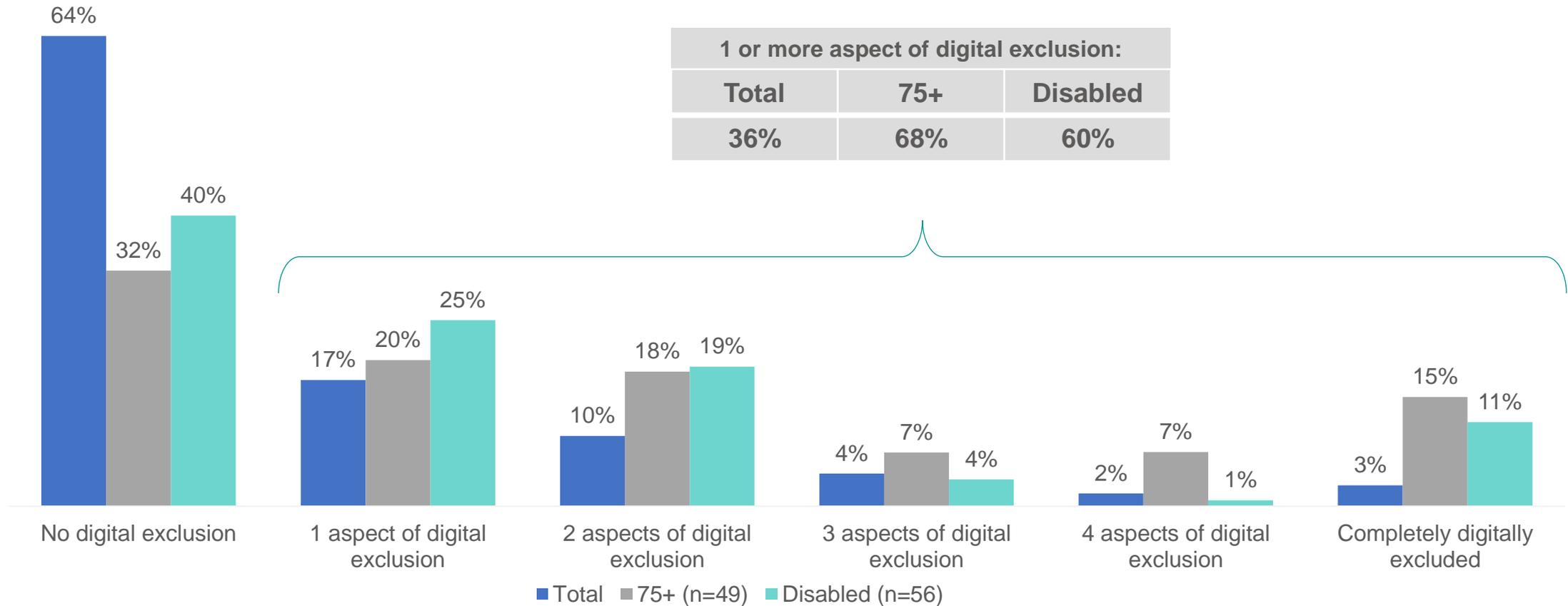
How often do you/do others in your household...?

	Digitally included:		Digitally excluded:	
	February (survey 1) + April (survey 2)* - Household has most/all of the time	September (survey 3) - Both you and others in household = most/all of the time	February (survey 1) + April (survey 2)* - Household does not have most/all of the time	September (survey 3) - At least one does not = most/all of the time
...have consistent and reliable access to an internet connection at home?	89%	91%	10%	9%
...have consistent and reliable access to devices that allow access to the internet and use digital services online?	91%	91%	8%	9%
...can afford access to the internet?	93%	88%	6%	10%
...have the skills they need to access and use digital services online?	85%	77%	14%	23%
...have the support needed to access and use digital services online?	85%	79%	12%	19%

DI_11. How often do you/do others in your household...? *Question in S3 was asked as a grid, between you and others in your household. For tracking purposes this has been combined to understand if either "you" or "others" did not have consistent access or support all or most of the time. This change in approach means any differences between surveys could be due to the change in question wording. Unweighted base: Unweighted base: Survey 1 + 2, 500; Survey 3, 235 (Telephone respondents)

Over a third of respondents (36%) highlighted that they have experienced **at least one aspect of digital exclusion**. This rises to two thirds (68%) of those aged over 75

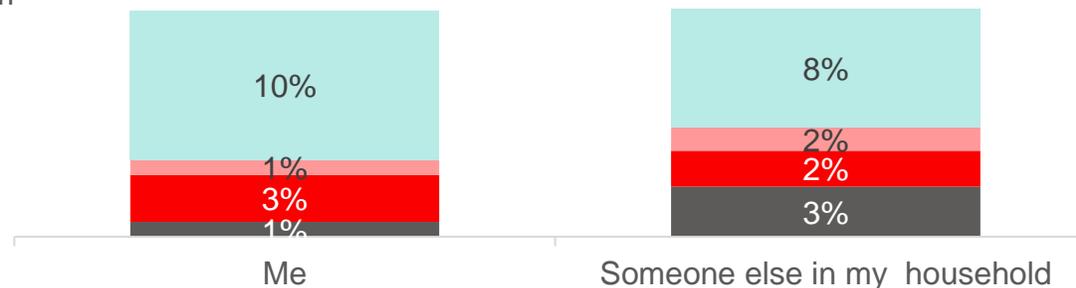
Number of aspects of digital exclusion experienced



Only a small minority (4%) of respondents say that they or others in their households do not **use digital services online**. This proportion is significantly higher amongst those aged 75+ (29%)

**Current and intended future use of digital services online
(excluding the % already using digital services and happy with their usage)**

- I use digital services online, but want to use them less
- I do not use digital services online, but want to use them
- I do not use digital services online and do not want to use them
- Prefer not to say



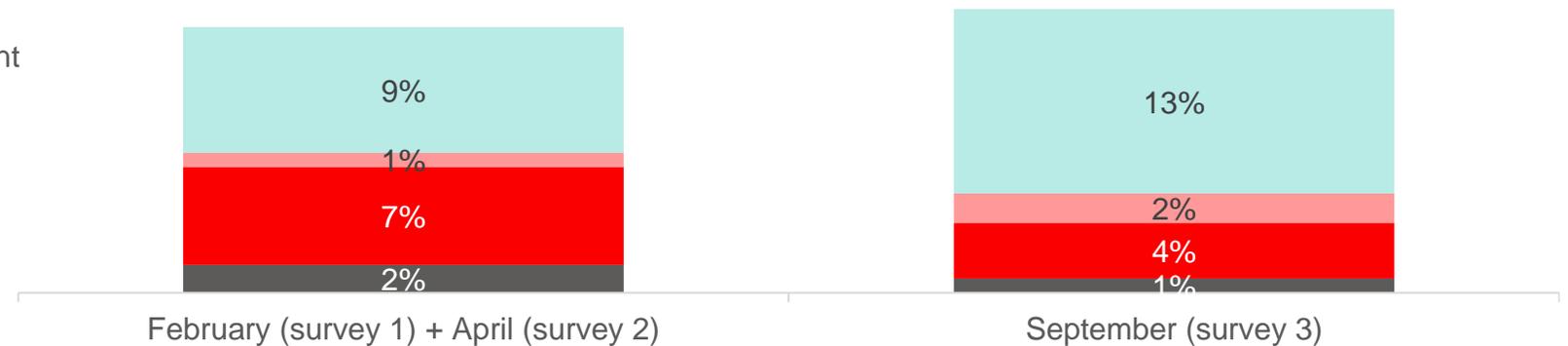
In general the following groups are more likely to personally not use digital services online (vs. GM average 4%)*

- Those aged 75+ (29%)
- Retired people (15%)

Respondents are slightly less likely than they were in Spring to say that they **do not use digital services online** and slightly more likely to say that they use them, but want to do so more

Current and intended future use of digital services online (excluding the % already using digital services and happy with their usage)

- I use digital services online, but want to use them less
- I do not use digital services online, but want to use them
- I do not use digital services online and do not want to use them
- Prefer not to say



Appendix: Summaries by local area

Bolton [page 64](#)

Bury [page 65](#)

Manchester [page 66](#)

Oldham [page 67](#)

Rochdale [page 68](#)

Salford [page 69](#)

Stockport [page 70](#)

Tameside [page 71](#)

Trafford [page 72](#)

Wigan [page 73](#)

Bolton

Covid-19:

- 28% of Bolton respondents say they are ‘extremely’ or very ‘worried’ about COVID-19. This is higher than the GM average (23%).
- Of those Bolton respondents who have had Covid-19 and recovered, 31% are currently experiencing lasting physical symptoms. This is higher than the GM average (28%).
- Around two thirds of respondents in Bolton have said they are likely to get a Covid-19 vaccine or booster (67%) or a flu vaccine (63%), in line with the GM average.

Food insecurity:

- Two fifths (40%) of Bolton households without children are considered food insecure under the household food security score, which is higher than the GM average of 34%.
- Almost 1 in 5 (19%) respondents in Bolton said it is ‘often true’ that they can’t afford to eat balanced meals, higher than the GM average of 14%.
- Over a third (35%) of residents in Bolton say someone in their household has cut the size of or skipped a meal for lack of money, this is the same as the GM average (35%).
- A quarter (25%) have lost weight because there wasn’t enough money for food. This is similar to the GM average (24%).

Cost of living:

- 4 in 5 (82%) of Bolton respondents say that over the past two weeks, they have been ‘very worried’ or ‘somewhat worried’ about the rising costs of living – similar to the GM average (81%).
- Over 9 in 10 (91%) of Bolton respondents have said they cost of living has increased over the last month, which is than the GM average of 84%.
- Over half of respondents in Bolton (54%) have said they are finding it difficult to afford their energy costs. This is in line with the GM average (56%).

Bury

Covid-19:

- 27% of Bury respondents say they are 'extremely' or 'very' worried about COVID-19. This is higher than the GM average (23%).
- Of those who have had Covid-19, 41% of residents are still experiencing some lasting effects, with 29% experiencing lasting physical symptoms. Both figures are in line with the GM average (39% and 28% respectively)..
- Just over 1 in 10 (12%) respondents in Bury say that they are unlikely to get either the Covid-19 vaccine/booster or flu jab this winter if offered to them. This is similar to the GM average (15%).

Food security:

- A quarter (25%) of Bury households without children are considered food insecure under the household food security score, though this is lower than the GM average of 34%.
- 1 in 3 households (33%) have had people in their households cut the size of meals, or skip meals as there hasn't been enough money for food in the last 12 months. This is in line with the GM average (35%).
- A fifth (20%) of respondents in Bury have lost weight because there wasn't enough money for food in the last 12 months, lower than the GM average (24%).

Cost of living:

- 82% of respondents in Bury have been worried about the rising costs of living in the last two weeks, which is similar to the GM average (81%).
- Over 8 in 10 respondents (82%) say that their cost of living has increased over the last month, which is in line with the GM average (84%).
- Six in ten (60%) respondents in Bury say that it is difficult to afford their energy costs. This is higher than the GM average (56%).

Manchester

Covid-19:

- Just over a quarter (26%) of respondents in Manchester say that they are 'extremely' or 'very' worried about Covid-19. This is similar to the GM average (23%).
- Just over half (51%) of respondents in Manchester who have had Covid-19 are still experiencing lasting impacts, with 37% experiencing lasting physical symptoms. Both figures are significantly higher than the GM average (39% and 28% respectively).
- Just over 1 in 6 (16%) respondents in Manchester say that they are unlikely to get either the Covid-19 vaccine/booster or the flu jab if offered to them this winter. This is similar to the GM average (15%).

Food security:

- Almost half (46%) of Manchester households without children are considered food insecure under the household food security score, which is higher than the GM average of 34%.
- Two in five (41%) of respondents have had someone in their household cut the size of meals or skipped meals because there wasn't enough money for food. This is higher than the GM average (35%).
- Under a third (30%) of respondents in Manchester have lost weight because there wasn't enough money for food. This is slightly higher than the GM average (24%).

Cost of living:

- Over three quarters (78%) of respondents in Manchester have worried in the past two weeks about the rising costs of living. This is lower than the GM average (81%).
- 86% of respondents in Manchester say that their cost of living has increased over the last month, which is in line with the GM average (84%).
- Six in ten (60%) respondents in Manchester say that it is difficult to afford their energy costs. This is higher than the GM average (56%).

Oldham

Covid-19:

- A fifth (21%) of respondents in Oldham are 'extremely' or 'very' worried about Covid-19. This is similar to the GM average (23%).
- Of those Oldham respondents who have had Covid-19 and recovered, 26% are currently experiencing lasting physical symptoms. This is in line with the GM average (28%).
- 13% of respondents in Oldham are unlikely to get either the Covid-19 vaccine/booster or the flu jab if offered to them this winter. This is in line with the GM average (15%).

Food security:

- Over a third (37%) of Oldham households without children are considered food insecure under the household food security score, which is in line with the GM average of 34%.
- Over 1 in 10 (12%) respondents in Oldham often worried in the last 12 months whether their food would run out before they got money to buy more. This is in line with the GM average (14%).
- Slightly under a quarter (23%) of respondents in Oldham have had someone in their household cut the size of meals or skipped meals because there wasn't enough money for food in the last 12 months. This is in line with the GM average (24%).

Cost of living:

- Over three quarters (77%) of respondents in Oldham have worried about the rising costs of living in the past two weeks. This is lower than the GM average (81%).
- 84% of respondents in Oldham have had their cost of living increase over the last month, the same as the GM average (84%).
- Over half (58%) of respondents in Oldham find it difficult to afford their energy costs. This is in line with the GM average (56%).

Rochdale

Covid-19:

- 29% of respondents in Rochdale are 'extremely' or 'very' worried about COVID-19 and its impacts. This is higher than the GM average (23%).
- Of those Rochdale respondents who have had Covid-19, 26% are currently experiencing lasting physical symptoms. This is in line with the GM average (28%).
- A quarter (25%) of respondents in Rochdale are unlikely to get either the Covid-19 vaccine/booster or the flu jab this winter if offered, this is significantly higher than the GM average (15%).

Food security:

- Under a third (30%) of Rochdale households without children are considered food insecure under the household food security score, though this is lower than the GM average of 34%.
- Just over a sixth (16%) of respondents' households in Rochdale have worried about whether their food would run out before they got money to buy more. This is in line with the GM average (14%).
- 40% of respondents in Rochdale have had someone in their household cut the size of meals or skipped meals because there wasn't enough money for food in the last 12 months. This is higher than the GM average (35%).
- Under a third (31%) of respondents in Rochdale have had someone in their household lose weight because there wasn't enough money for food in the last 12 months. This is higher than the GM average (24%).

Cost of living:

- Over 8 in 10 (84%) respondents in Rochdale have worried about the rising costs of living in the past two weeks. This is similar to the GM average (81%).
- 84% of respondents in Rochdale say that their cost of living has increased over the last month. This is the same as the GM average (84%).
- Nearly two thirds (62%) of respondents in Rochdale say that it is difficult to afford their energy costs. This is higher than the GM average (56%).

Salford

Covid-19:

- Just over a fifth (22%) of respondents in Salford are 'extremely' or 'very' worried about Covid-19 and its impacts. This is similar to the GM average (23%).
- Of those Salford respondents who have had Covid-19, 23% are currently experiencing lasting physical symptoms. This is lower than the GM average (28%).
- 15% of respondents in Salford are unlikely to get either the Covid-19 vaccine/booster or the flu jab this winter if offered. This is the same as the GM average (15%).

Food security:

- Two fifths (42%) of Salford households without children are considered food insecure under the household food security score, which is significantly higher than the GM average of 34%.
- Just over 1 in 10 (12%) of respondents' households in Salford have worried about whether their food would run out before they got money to buy more. This is in line with the GM average (14%).
- A third (34%) of respondents in Salford have had someone in their household cut the size of meals or skipped meals because there wasn't enough money for food in the last 12 months. This is similar to the GM average (35%).
- 23% of respondents in Salford have had someone in their household lose weight because there wasn't enough money for food in the last 12 months. This is similar to the GM average (24%).

Cost of living:

- 8 in 10 (80%) respondents in Salford have worried about the rising costs of living in the past two weeks. This is similar to the GM average (81%).
- 83% of respondents in Salford say that their cost of living has increased over the last month. This is similar to the GM average (84%).
- Just over half (52%) of respondents in Salford say that it is difficult to afford their energy costs. This is lower than the GM average (56%).

Stockport

Covid-19:

- Just under a fifth (18%) of respondents in Stockport are 'extremely' or 'very' worried about Covid-19 and its impacts. This is lower than the GM average (23%).
- Of those Stockport respondents who have had Covid-19, 28% are currently experiencing lasting physical symptoms. This is the same as the GM average (28%).
- 10% of respondents in Stockport are unlikely to get either the Covid-19 vaccine/booster or the flu jab this winter if offered. This is lower than the GM average (15%).

Food security:

- 29% of Stockport households without children are considered food insecure under the household food security score, though this is lower than the GM average of 34%.
- 1 in 10 (10%) of respondents' households in Stockport have worried about whether their food would run out before they got money to buy more. This is slightly lower than the GM average (14%).
- A third (33%) of respondents in Stockport have had someone in their household cut the size of meals or skipped meals because there wasn't enough money for food in the last 12 months. This is similar to the GM average (35%).
- 18% of respondents in Stockport have had someone in their household lose weight because there wasn't enough money for food in the last 12 months. This is lower than the GM average (24%).

Cost of living:

- 85% of respondents in Stockport have worried about the rising costs of living in the past two weeks. This is slightly higher than the GM average (81%).
- 84% of respondents in Stockport say that their cost of living has increased over the last month. This is the same as the GM average (84%).
- Over half (56%) of respondents in Stockport say that it is difficult to afford their energy costs. This is the same as the GM average (56%).

Tameside

Covid-19:

- A fifth (20%) of respondents in Tameside are 'extremely' or 'very' worried about Covid-19. This is similar to the GM average of 23%.
- Of those Tameside respondents who have had Covid-19 and recovered, 18% are currently experiencing lasting physical symptoms. This is significantly lower than the GM average of 28%.
- 17% of respondents in Tameside are unlikely to get either the Covid-19 vaccine/booster or the flu jab this winter if offered, similar to the GM average (15%).

Food security:

- A quarter (25%) of Tameside households without children are considered food insecure under the household food security score, though this is lower than the GM average of 34%.
- Nearly 1 in 6 (14%) respondents in Tameside say it is 'often true' that their household worried whether their food would run out before they got money to buy more - the same as the GM average.
- 34% of Tameside respondents say that someone in their household has cut the size of meals or skipped meals because there wasn't enough money for food. This is in line with the GM average (35%).
- 25% of Tameside respondents say someone in their household has lost weight for lack of money for food, which is in line with the GM average (24%).

Cost of living:

- 86% of Tameside respondents have been 'very' or 'somewhat' worried about the rising costs of living in the past two weeks. This is higher than the GM average (81%).
- Over three quarters (77%) of respondents in Tameside have had an increase in their cost of living over the last month, lower than the GM average (84%).
- 54% of respondents in Tameside say that it is difficult for them to afford their energy costs, this is similar to the GM average (56%).

Trafford

Covid-19:

- 15% of Trafford respondents are 'extremely' or 'very' worried about Covid-19 and its impacts. This is significantly lower than the GM average of 23%.
- Of those Trafford respondents who have had Covid-19, 25% are currently experiencing lasting physical symptoms. This is in line with the GM average (28%).
- 9% of Trafford respondents say they are unlikely to get either the Covid-19 vaccine/booster or flu jab this winter if offered. This is lower than the GM average (15%).

Food security:

- A third (33%) of Trafford households without children are considered food insecure under the household food security score, though this is in line with the GM average of 34%.
- 9% of respondents in Trafford say that it is 'often true' that their households worried about whether their food would run out before they got money to buy more, lower than the GM average (14%).
- One in four (24%) respondents in Trafford say that someone in their household has cut the size of or skipped meals because there wasn't enough money for food, in the last 12 months. This is significantly lower than the GM average (35%).
- 23% of respondents in Trafford say that someone in their household has lost weight because there wasn't enough money for food in the last 12 months. This is in line with the GM average (24%).

Cost of living:

- 80% of respondents in Trafford say that they have been 'very' or 'somewhat' worried about the rising costs of living within the past 2 weeks - in line with the GM average (81%).
- Nearly 8 in 10 (79%) Trafford respondents say there has been an increase in their cost of living over the last month. This is slightly lower than the GM average (84%).
- Nearly half (48%) of Trafford respondents say that it is difficult to afford their energy costs, significantly lower than the GM average (56%).

Wigan

Covid-19:

- 21% of respondents in Wigan are 'extremely' or 'very' worried about Covid-19 and its impacts. This is similar to the GM average (23%).
- Of those Bolton respondents who have had Covid-19, 25% are currently experiencing lasting physical symptoms. This is in line with the GM average (28%).
- 15% of Wigan respondents are unlikely to get either the Covid-19 vaccine/booster or the flu jab this winter, if offered. This is the same as the GM average (15%).

Food security:

- A quarter (25%) of Wigan households without children are considered food insecure under the household food security score, though this is lower than the GM average of 34%.
- 14% of Wigan respondents say that it is 'often true' that their household worried whether their food would run out before they got more money to buy more. The same as the GM average.
- A third (32%) of respondents in Wigan say either they or someone in their household has cut the size of meals or skipped meals because there wasn't enough money for food. This is in line with the GM average (35%).
- 19% of respondents in Wigan say they or someone in their household has lost weight because there wasn't enough money for food, lower than the GM average (24%).

Cost of living:

- 80% of Wigan respondents say that they have been 'very' or 'somewhat' worried about the rising costs of living in the past two weeks. This is similar to the GM average (81%).
- 88% of respondents in Wigan say that their cost of living has increased in the past month, higher than the GM average (84%).
- Six in ten (57%) Wigan respondents say that it is 'very' or 'somewhat' difficult to afford their energy costs. This is similar to the GM average (56%).

Carried out on behalf of Greater Manchester partners by

