Greater Manchester Residents' Survey

Survey 17 (main report)

April 2025

Fieldwork conducted 17th - 28th February 2025

Report contents

Introduction and methodology

Background

- This report presents summary findings for a quantitative **survey carried out between 17th and the 28th February 2025, with a representative sample of 1,515 residents** from across all ten Greater Manchester local authority areas.
- The report is divided into themed sections, providing an overview into **respondents' feelings and behaviours around personal health and wellbeing, good work, local area, cost of living , early years and digital access.**
- Data from February 2025 (survey 17) is sometimes presented alongside that from similar Greater Manchester resident surveys undertaken in December 2024 (survey 16) and October 2024 (survey 15). The following approaches have been used, identified as most appropriate for the datasets in each theme:
  - health and wellbeing – data from individual surveys is shown separately, in the main
  - good work – merged data for surveys 15, 16 and 17 is used, often with historical comparisons
  - local area – data from individual surveys is shown separately, except when commenting on trends for specific sub-groups or districts
  - cost of living – data from individual surveys is shown separately, often with a timeline back to 2022
  - early education workforce campaign – data from survey 17 only is shown, as this is a new topic
  - digital inclusion – merged data for surveys 15, 16 and 17 is used, drawing on face-to-face responses only
- To provide a national comparison, where available, **Greater Manchester findings are presented alongside the most recent benchmarking data from relevant national surveys** – for example, published figures from the Office for National Statistics (ONS) and the Department for Culture Media and Sport (DCMS).
- These surveys are intended to provide regular ongoing insights for Greater Manchester organisations and partners to help inform how and where to target support, communications / engagement activities and resources to improve the lives of Greater Manchester residents.

Methodology

- Between February 2022 and February 2025, BMG Research has undertaken seventeen surveys, each comprising circa 1,500 residents from across Greater Manchester.
- In surveys 1 to 11 the sample was comprised of approximately 750 online panel respondents, 250 telephone respondents, and 500 online 'river sampled' respondents (those who responded to adverts, offers and invitations to take part in the surveys).
- **From survey 12 (May 2024) onwards the methodology was revised**, to now include around:
  - 750 online panel respondents
  - 500 online rapid respondents (see Appendix for more details), and
  - 250 face-to-face respondents
- This mix of online and face-to-face surveying was agreed so that the most representative and robust sample of Greater Manchester residents can be regularly sourced within available time and budget. **One of the main reasons the face-to-face element is included is so that those without internet access can take part in the survey. It has replaced the previous telephone approach because analysis suggests those who are truly digitally excluded are less likely to be able to take part by phone.**
- This new methodology has remained consistent for the duration of 2024/25. With six waves of face-to-face methodology now, it is apparent that the change in approach has had some impact on the trackability of digital inclusion, to be borne in mind. See Appendix for more details.
- Each survey is designed to take **15 minutes** on average for respondents to complete; however, due to the emotive nature of some topics covered, face-to-face interviews tend to take longer than this.
- **Quotas** are set to ensure the sample broadly reflects the profile of Greater Manchester's population by gender, age, ethnicity and disability, with further consideration of wider protected and key characteristics.
- **Weights** have been applied to the data gathered to ensure the sample matches the population profile by age, gender, ethnicity, disability and locality, and to ensure consistency between individual surveys.

Report contents and guidance

Identifying significant differences / change

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

Sample sizes

- On some questions, **responses have been filtered only to include respondents to whom the question is relevant** (e.g. those in work, or with children), and so bases are lower than the full sample of 1,515 respondents in some instances. Where this is the case, this has been noted in the footnotes of each slide, along with the unweighted base sizes.

Language - inequalities

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

Executive Summary

Executive Summary

Health and Wellbeing

- Overall levels of **life satisfaction** (66%), feeling that the things they do in their life are **worthwhile** (66%) and **happiness** (64%) remain at high levels, particularly when compared to previous surveys, continuing a positive trend since October. The latest picture for **levels of anxiety** is more mixed**.** You can find out more here.
- Levels of "**hopefulness about the future**" (73% hopeful) compare favourably to the latest figures being seen by the ONS across GB as a whole (69%). Sentiments about "fair treatment by society" are also significantly higher than GB figures (55% GM cf. 50% GB). You can find out more here.
- **Awareness of the Respiratory Syncytial Virus (RSV) vaccine** has increased significantly since August 2024 (38% cf. 23%), with NHS-led campaign activity since last summer. At least 4 in 5 of those who think they are eligible, would take up the offer of an RSV vaccine. However, the RSV vaccine remains much less widely known than the Covid or flu vaccines. You can find out more here.

Good Work

- Looking at merged data between October 2024 and February 2025, **overall job satisfaction** is a little lower than twelve months ago (Feb '24) (65% cf. 68%). However, this slight fall appears not to be owed to decreases in satisfaction with pay or hours – both of which have stayed in line with previous surveys. You can find out more here.
- This decrease may be in some way attributable to high **levels of stress or pressure at work** - where 3 in 4 (75%) say this occurs at least sometimes. You can find out more here.
- 7 in 10 (72%) agree that their **job makes good use of their skills and abilities**, and 4 in 5 (83%) say their job requires them to learn new things at least sometimes. However, 1 in 5 (22%) have been not provided with any **opportunities in professional development or training**. You can find out more here

Your local area

- Three quarters (74%) of respondents are **satisfied with their local area** as a place to live, including 26% very satisfied. This is in line with previous surveys and equal to DCMS benchmarking (74%). You can find out more here.
- However, there has been a decline in those who agree that they are **proud of their local area** (70% cf. 75% in Dec '24). You can find out more here.
- Two thirds (67%) of respondents continue to be **satisfied with the general availability of public transport in their local area.** Levels of satisfaction with specific options are as follows: 3 in 5 (59%) respondents reported satisfaction with bus services, followed by train and tram services at both just under one-half (46%). You can find out more here and here

Cost of living

- There is broad stability in measures surrounding the cost of living. 3 in 10 (31%) of GM respondents have **borrowed more money or used more credit in the past month** than was the case a year ago. This is stable with the proportion reporting this a year ago in February 2024 (29%). You can find out more here.
- Proportions experiencing difficulties meeting **energy costs** remain higher among GM respondents (45%) than in GB survey benchmarking (36%). *Fieldwork for this wave was conducted before April 1st price rises.* You can find out more here.
- Though **mortgage payers** are still more likely than renters to be able to afford payments, 37% now say they are finding this difficult. You can find out more here.

Executive Summary

Early education workforce campaign

- **A quarter of respondents (26%) said they have seen advertisements related to the campaign around Greater Manchester**. Of those who said they have seen these messages, a third (33%) say they had seen them on social media. 3 in 10 (28%) have seen them on a bus or a tram, or a bus or tram stop. You can find out more here.
- Two in five (39%) feel the **campaign advertisements communicated clearly the message** that ‘quality early education and childcare is important’, and a quarter (26%) felt the campaign is believable. These figures were higher amongst parents.
- Those who had seen the adverts before being shown examples on the day of the survey were significantly more likely to agree that the adverts are relevant, engaging, and that the message is clear – for example, just over half (51%) of those survey respondents already familiar with the campaign agreed that the headline message was clear. You can find out more here.

Health and wellbeing

Health and wellbeing – context

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

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

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

From July 2024 onwards, this survey also includes additional measures of wellbeing, around hope for the future and fairness of treatment by society. These questions mirror those from ONS' UK Measures of National Well-being, allowing for comparison of Greater Manchester and national results.

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

In this specific wave, we revisited questions designed to gauge residents' awareness of COVID-19, flu, and Respiratory Syncytial Virus (RSV) vaccines, and general attitudes towards these. This follows fresh campaign activity since the summer of 2024.

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Health and wellbeing– key findings (1 of 2)

SELF-REPORTED WELLBEING

- Two-thirds (66%) of GM respondents record high life satisfaction, which is in line with previous waves. This wave recorded a further increase in levels of 'very high' life satisfaction (now 24% of respondents), which is an all-time high - an increase since December 2024 (22%), October 2024 (20%), and August 2024 (18%).
- Respondents who say things they do in their life are very worthwhile (score 9-10) has remained the same since the previous wave, still a joint-high score of 28%.
- One-quarter (26%) of respondents say they feel a very high level of happiness – the joint highest recorded score so far, in line with the previous wave.
- While the picture continues to looks positive in relation to 'satisfaction', 'worthwhile' and happiness' wellbeing strands, levels of anxiety nonetheless remain relatively constant in regard to 'high' (36%) and 'medium' anxiety (17%). That said, levels of 'very low' anxiety have significantly increased since last wave by 3pp, representing the highest levels of 'very low' anxiety recorded.
- Respondents from a mixed ethnicity were more likely report 'low' levels of life satisfaction compared to the GM average, while younger respondents and those who identify as trans were more likely to say that they were highly anxious the day before.

HOPE AND FAIRNESS

- In February 2025, just under 3 in 4 (73%) reported high levels of hopefulness about their future. This is significantly lower than the 77% who reported high levels of hopefulness over the period August – December 2024. Despite the drop, hopefulness for the future remains significantly higher in Greater Manchester compared to the rest of GB* (73% GM; 69% GB)
    - Respondents with a disability, along with respondents who would not recommend their local area as a place to live, are significantly more likely to have low levels of hopefulness about their future.
- Approaching one in five respondents (18%) feel that they are treated unfairly by society. This is similar to the 17% who reported feeling this way over the period August – December 2024. Overall, this is in line with the rest of GB (19%), though there is a higher proportion of those in GM who feel they are treated fairly (55% GM; 50% in rest of GB).
    - Those who have a disability are significantly more likely to feel low hopefulness and that society treats them unfairly. Similarly, respondents who are dissatisfied with their job and pay are significantly more likely to feel low hopefulness and that society treats them unfairly.

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* Current GB benchmarking figures taken from the UK Measures of National Well-being - Office for National Statistics (ons.gov.uk). This figure was published 11 February 2025 and relates to fieldwork undertaken on behalf of ONS between 4 Dec 2024 to 5 Jan 2025.

Health and wellbeing– key findings (2 of 2)

VACCINATIONS (PUBLIC AWARENESS OF / ATTITUDES TOWARDS) - REINTRODUCED FOR THE FIRST TIME SINCE AUGUST 2024 (S14)

This survey revisited questions designed to gauge residents' awareness of COVID-19, flu, and Respiratory Syncytial Virus (RSV) vaccines, and general attitudes towards these. This follows fresh campaign activity since the summer of 2024.

<u>Awareness levels</u>

- Awareness of the Covid and flu vaccines remains very high at 94% and 92%, respectively (this was also the case in August 2024, 95% and 91%, respectively).
- Awareness of the RSV vaccine has increased significantly – now 38% of all respondents are aware compared to 23% in August. Awareness of the RSV vaccine amongst females under 40 with children under 5 has similarly increased compared to August, with this now sitting at 59% compared to 47% (though this specific rise was not a statistically significant increase).
- Even for those aware of each vaccine, understanding of whether or not they are eligible for each vaccine is significantly lower for the RSV vaccine than for Covid and flu (77% of those aware of Covid vaccine think they are eligible; 73% of those aware of flu vaccine think they are eligible; 45% of those aware of RSV vaccine think they are eligible).

<u>Likelihood of taking up a vaccine, if eligible</u>

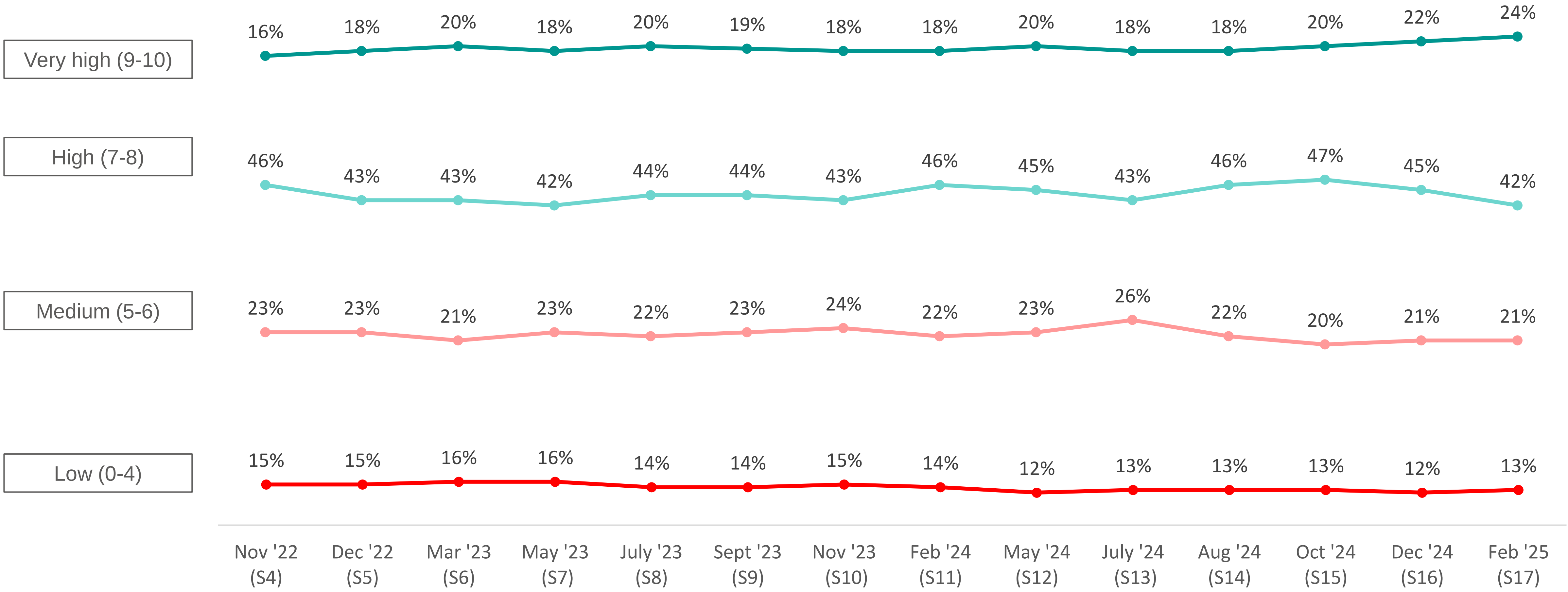
- However, for the those who think they are eligible for each vaccine, the share who would take up the RSV vaccine is in fact higher than the uptake for Covid, though slightly lower than flu (79% who think they are eligible for Covid vaccine would take it; 96% who think they are eligible for flu vaccine would take it; 87% who think they are eligible for RSV vaccine would take it).

<u>Campaign familiarity / recall</u>

- Only a third (32%) say they have heard adverts about winter vaccinations on local radio across Greater Manchester. When prompted with images of the adverts, recall of the campaign increases slightly to 37% of respondents.
    - Females over 40 with children under 5 were more likely to say they have heard the adverts on local radio (54%), as well as those with a learning disability (47%).

Life satisfaction remains high this wave among Greater Manchester residents, with respondents with **very high** satisfaction reaching an all-time high of 24% (up 2pp from December 2024), a steady rise since Aug 2024 (18%).

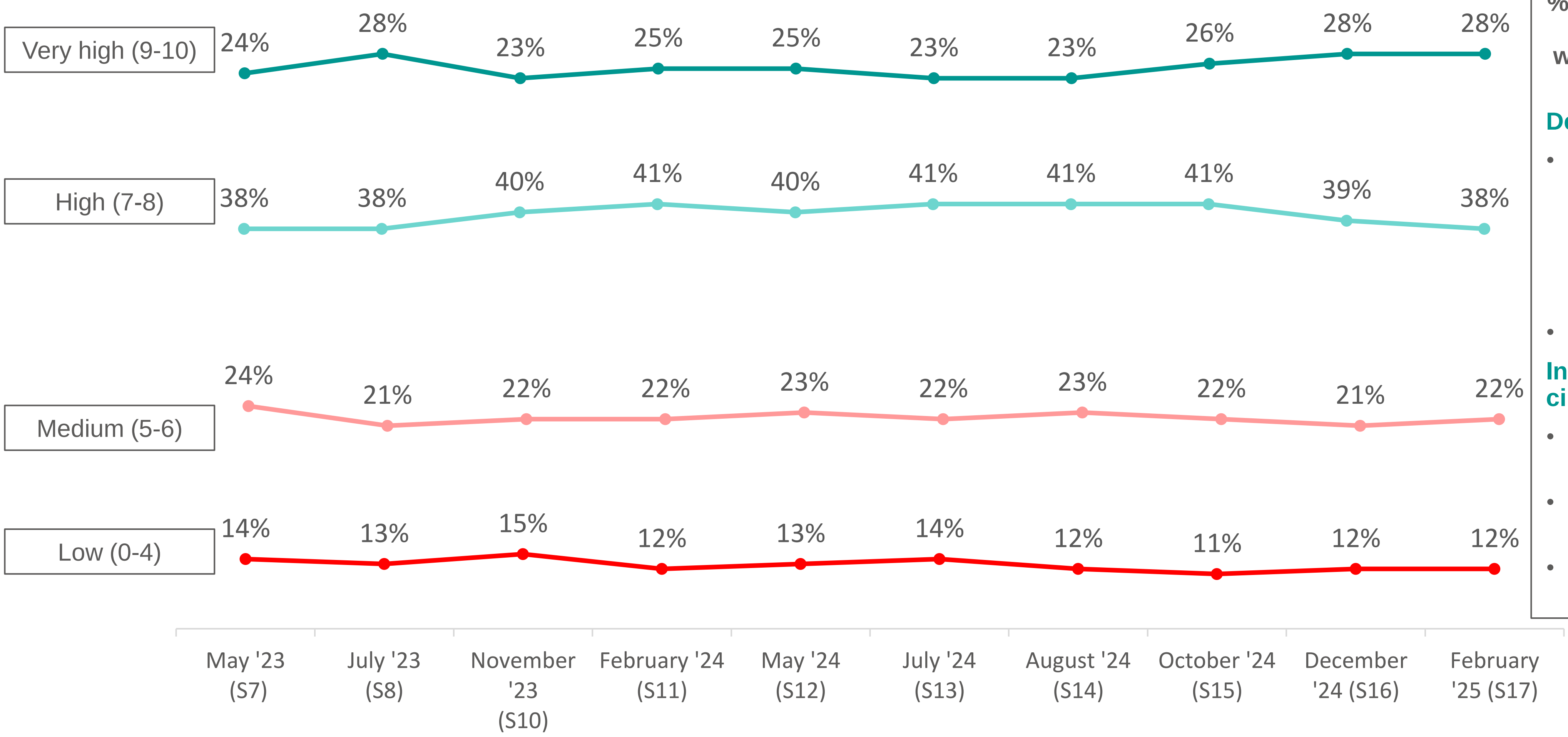
How satisfied are you with your life nowadays?



A1. Where 0 is “not at all” and 10 is “completely”…
Unweighted base: Greater Manchester Residents Survey 4: 1636; Survey 5: 1470; Survey 6: 1767, Survey 7: 1488, Survey 8: 1612, Survey 9: 1560, Survey 10: 1546, Survey 11: 1460, Survey 12: 1551, Survey 13: 1540, Survey 14: 1482, Survey 15: 1517; Survey 16: 1523, Survey 17 (Feb ‘25): 1515

Respondents who say things they do in their life are very worthwhile (score 9-10) has remained the same since the previous wave, still a joint-high figure of 28%. However, those with disabilities continue to be significantly less positive that the things they do in their life are worthwhile.

To what extent are the things you do in your life worthwhile?



% who felt that the things they do in their life are not at all worthwhile ccompared to GM average (12%)*:

Demographics:

- Those who have a disability (22%), including mental ill health (32%), learning disability(25%), a sensory disability (24%), or mobility disability (22%)
- Those bisexual (22%)

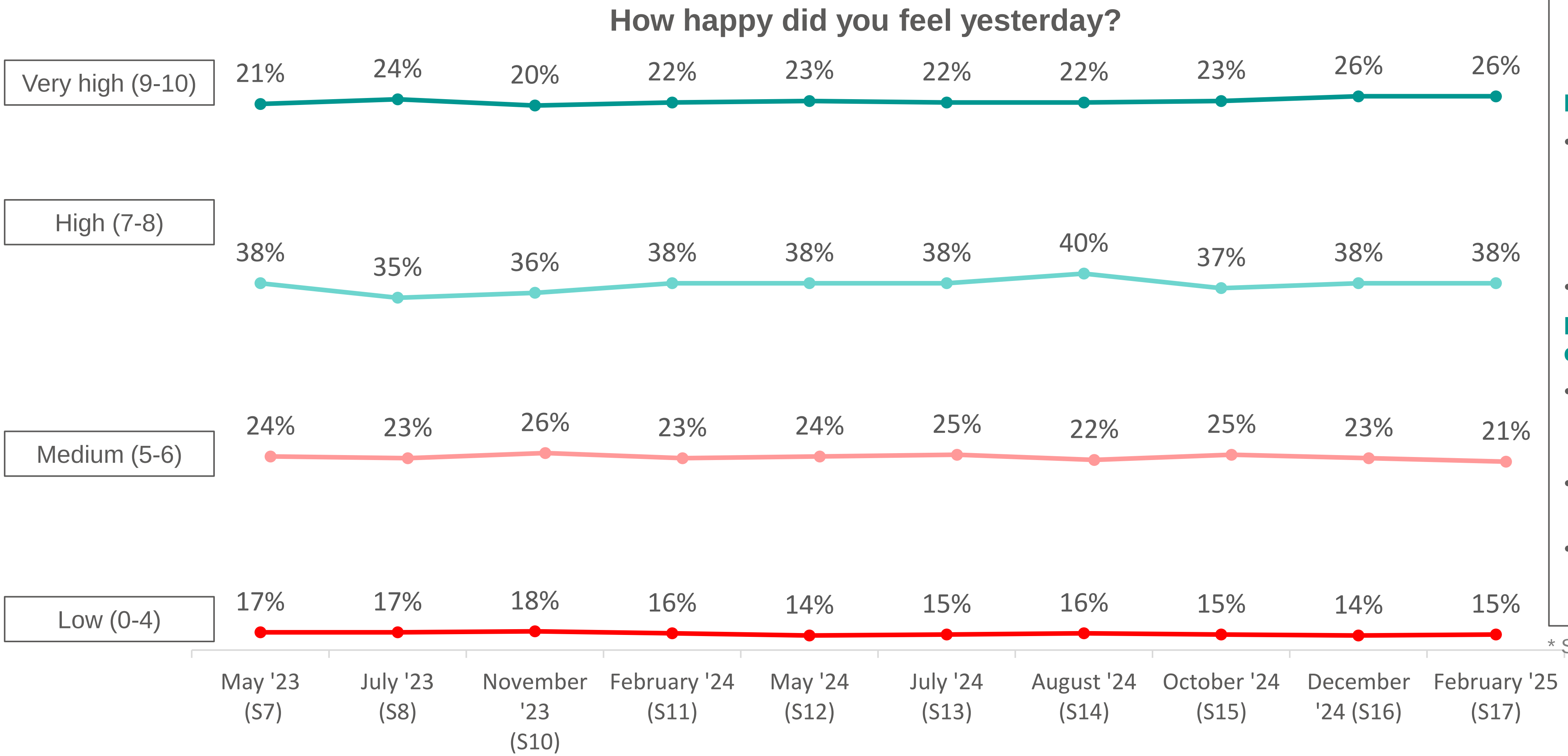
Individual and/or family circumstance:

- Those not in work due to ill health or disability (37%)
- Those studying at school of college (27%)
- Those with a household income below £10.4k (24%)

* Subgroup analysis uses merged data from S15-17

Q10. Overall, to what extent do you feel that the things you do in your life are worthwhile, on a scale of 0 to 10, where 0 is "not at all" and 10 is "completely"? / Unweighted base: (All respondents) S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517; S16, 1523; S17 (Feb '25), 1515. Thresholds are applied to responses to convert the 11-point scale into the categories shown. Unweighted base: S15-17 = 4555 (All respondents).

One-quarter (26%) of respondents say they feel a very high level of happiness – the joint highest recorded figure so far, in line with the previous wave. However, those with a disability and those who are aged 18-24 are significantly more likely to not feel at all happy yesterday (score 0-4).



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

Demographics:

- Those who have a disability (29%), including those with mental ill health (40%), a mobility disability (29%) or sensory disability (28%)
- Those aged 18-24 (19%)

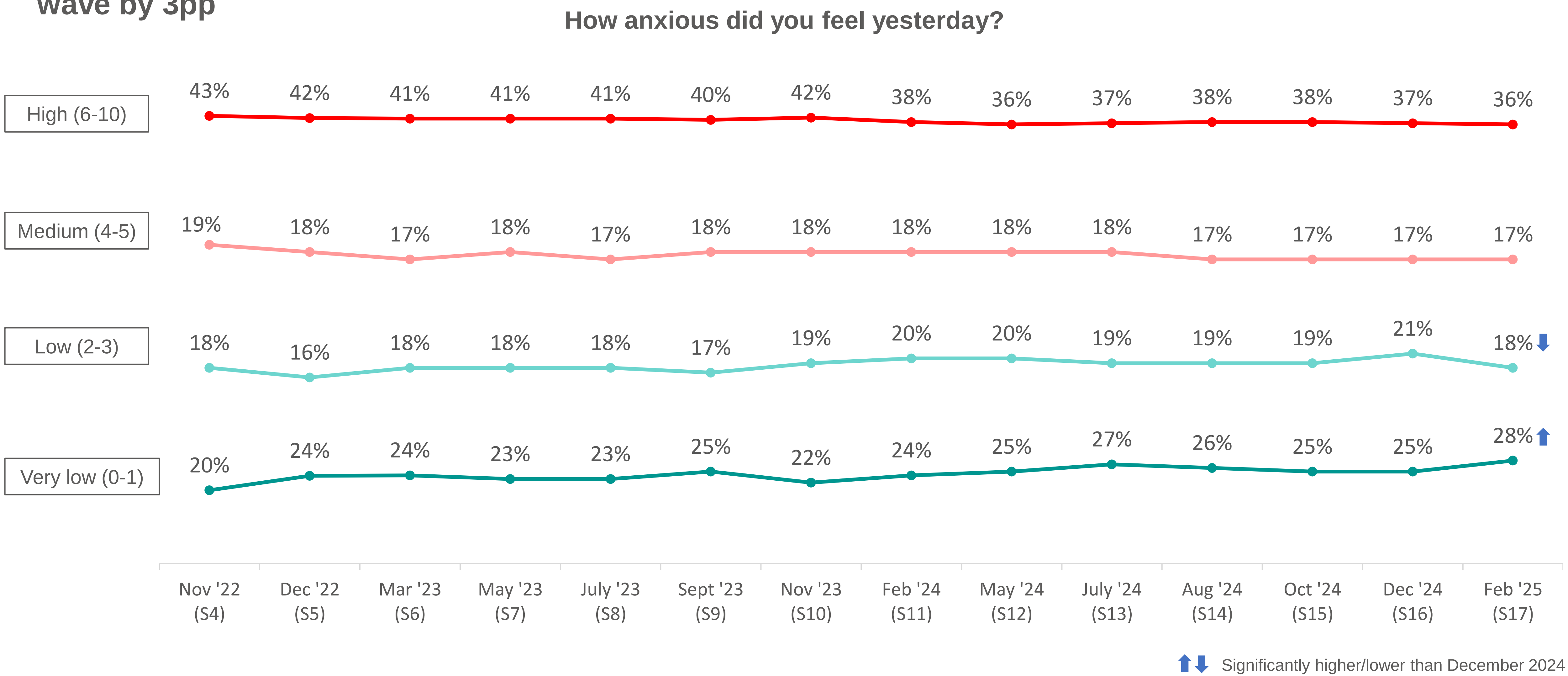
Individual and/or family circumstance:

- Those who have a condition which reduces ability to do activities a lot (35%)
- Those who are dissatisfied with their local area (31%)
- Those out of work for 6 months or less (26%)

* Subgroup analysis uses merged data from S15-17

Q11. Overall, how happy did you feel yesterday, on a scale of 0 to 10, where 0 is "not at all" and 10 is "completely"? S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517; S16, 1523; S17 (Feb '25), 1515. Thresholds are applied to responses to convert the 11-point scale into the categories shown.
Unweighted base: Greater Manchester Residents Survey 15-17: 4555 (All respondents)

While the picture continues to looks positive in relation to ‘satisfaction’, ‘worthwhile’ and happiness’ wellbeing strands, levels of anxiety nonetheless remain relatively constant in regard to ‘high’ (36%) and ‘medium’ anxiety (17%). That said, levels of ‘very low’ anxiety have significantly increased since last wave by 3pp



A2. Where 0 is “not at all” and 10 is “completely”…
Unweighted base: Greater Manchester Residents Survey 4, 1636; Survey 5: 1470, Survey 6: 1767, Survey 7: 1488, Survey 8: 1612, Survey 9: 1560, Survey 10: 1546, Survey 11: 1460, Survey 12: 1551, Survey 13: 1540, Survey 14: 1482, Survey 15: 1517; Survey 16: 1523; Survey 17 (Feb ‘25): 1515

When looking at sub-groups, respondents with a disability, along with respondents who would not recommend their local area as a place to live, are significantly more likely to have low levels of life satisfaction and high levels of anxiety.

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

Demographics:

- Those with a disability (25%), including those with mental ill health (36%), a mobility disability (27%), a sensory disability (26%), learning disability (23%) or other disability (23%)
- *Those who have a mixed ethnicity (20%)*
- Those who are not heterosexual (20%), particularly those bisexual (18%)

Individual and/or family circumstance:

- Those not in work due to ill health or disability (42%), have been out of work for more than 6 months (31%), or have been out of work for 6 months or less (26%)
- Those dissatisfied with their local area (32%) or would not recommend their local area (27%)
- Those who have been treated unfairly by society (31%)
- Those who are dissatisfied with their job (30%), pay (23%) or work hours (21%)
- Those with a household income up to £10,399 (26%)
- *Those who live on their own (18%)*

% who felt 'highly anxious' compared to GM average (37%) is higher among*:

Demographics:

- Those with a disability (52%) including those with mental ill health (69%) or learning disability (60%).
- Those who are bisexual (57%)
- Those who identify as trans (47%)
- Those aged 18-24 (47%) or females under 45 (46%)

Individual and/or family circumstance:

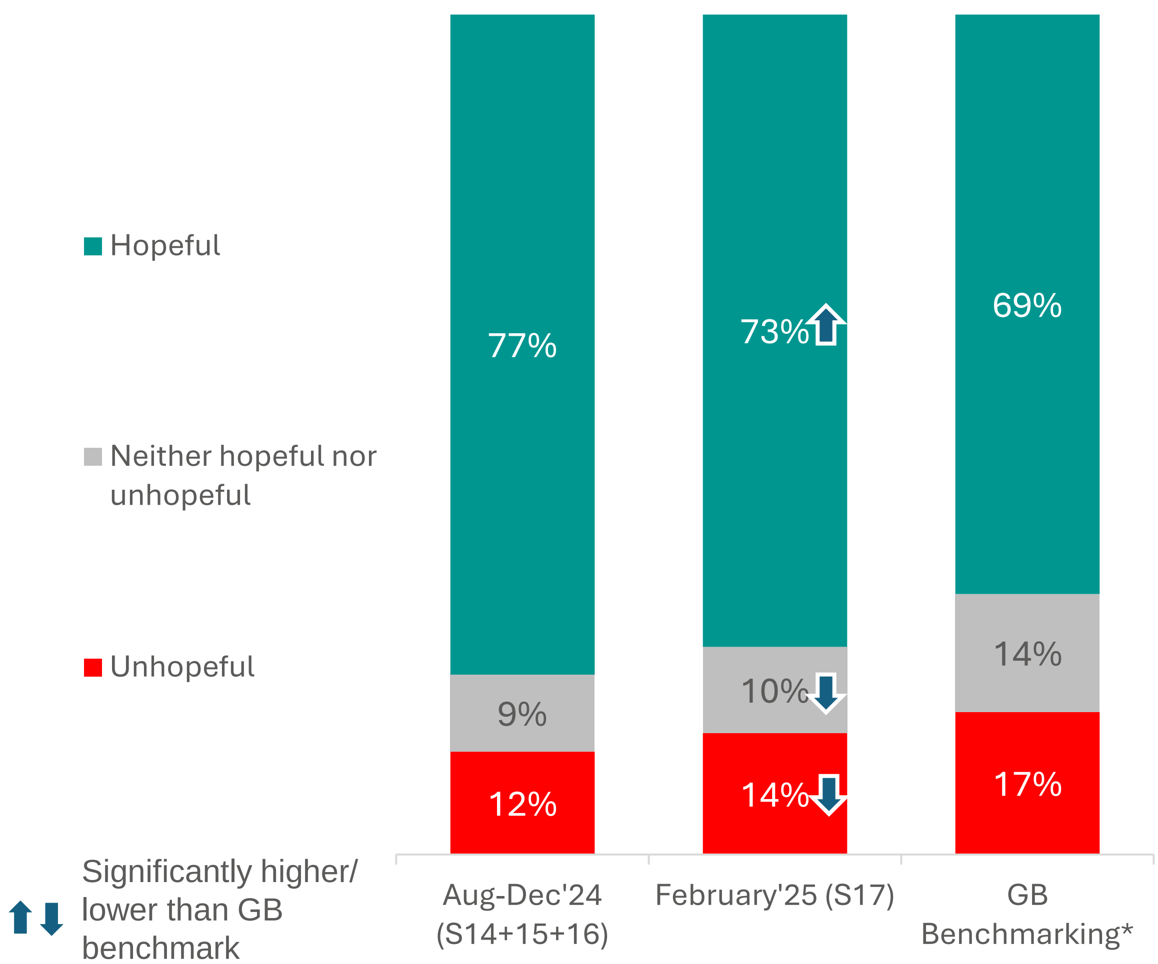
- Those likely to lose their job over the next 12 months (60%)
- *Those who feel lonely at least some of the time (58%)*
- Those with a household income up to £10,399 (53%)
- Those who have borrowed money/used more credit in the past month (50%) and find themselves financially vulnerable (47%)
- Those not in work due to ill health/disability (59%)
- *Those living with a friend/family (49%)*
- *Those who would not recommend their local area (47%)*
- Renters (Housing Association/Trust) (47%)

* Subgroup analysis uses merged data from S15, 16 and 17 combined. *Italics denotes greater prominence / newly featuring in latest analysis compared to previous wave*

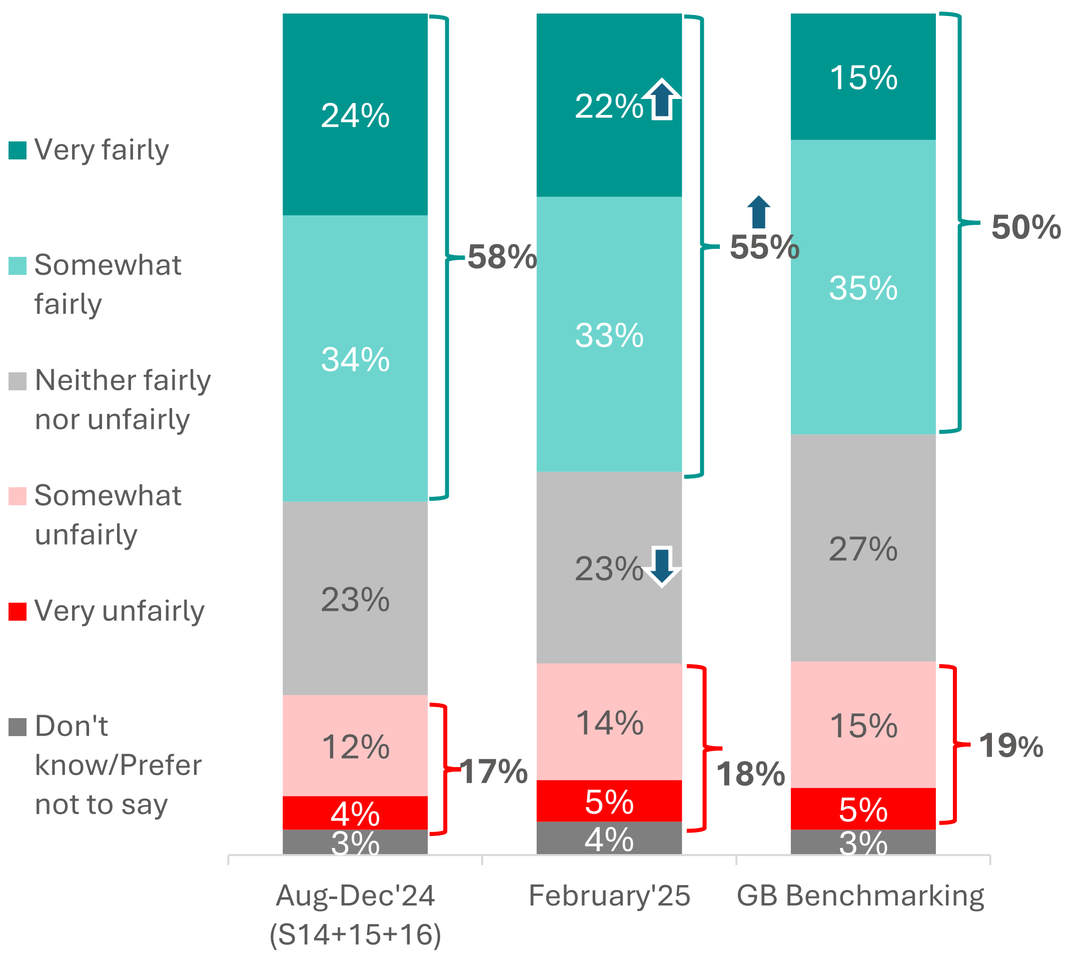
A1. Where 0 is "not at all" and 10 is "completely"… A2. Where 0 is "not at all" and 10 is "completely"… Unweighted base: Greater Manchester Residents Surveys 15-17, 4555

Hopefulness about the future continues to be higher in Greater Manchester compared to GB, though there has been a drop compared to figures recorded in Aug – Dec 2024. Similarly, GM respondents are more likely to feel fairly treated by society compared to GB.

How hopeful do you feel about your future?



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



A3. Overall, how hopeful do you feel about your future, where 0 is 'not at all hopeful' and 10 is 'completely hopeful'? A4. How fairly or unfairly do you feel you are treated by society?
Base: Feb'25 (S17), 1515. GB benchmarking taken from UK measures of wellbeing (fieldwork period 4 Dec 2024 to 5 Jan 2025) *Figure 67% in national figures, rebased for reporting purposes.

Those who have a disability are significantly more likely to feel low hopefulness and that society treats them unfairly. Similarly, respondents who are dissatisfied with their job and pay are significantly more likely to feel low hopefulness and that society treats them unfairly.

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

Demographics:

- Those with a disability (27%) including mental ill health (37%), or a sensory disability (31%), or a mobility disability (30%)
- *Those who are lesbian or a gay women (21%)*
- *Those age 45-54 (16%)*
- Those with no religion (15%)

Individual and/or family circumstance:

- Those who do not feel they can look after their own health (52%) or know enough about their own health (36%)
- Those not in work due to ill health or disability (43%)
- *Those who are dissatisfied with their local area (33%)*
- Those who have been out of work for 6 months or more (30%), and those who have been out of work for less than 6 months (23%)
- *Those who disagree that their job makes good use of their skills and abilities (28%)*
- Those who are not satisfied with their job (27%) or with their work hours (23%)
- Those who are lonely at least some of the time (25%)
- Those with a household income of less than £10.4k (23%)

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

Demographics:

- Those with a disability (29%), including those with a learning disability (37%), mental ill health (36%), a sensory disability (32%), or a mobility disability (30%)
- Gay men (34%)
- Gay women or lesbians (27%)
- *Those from any other white background (27%)*

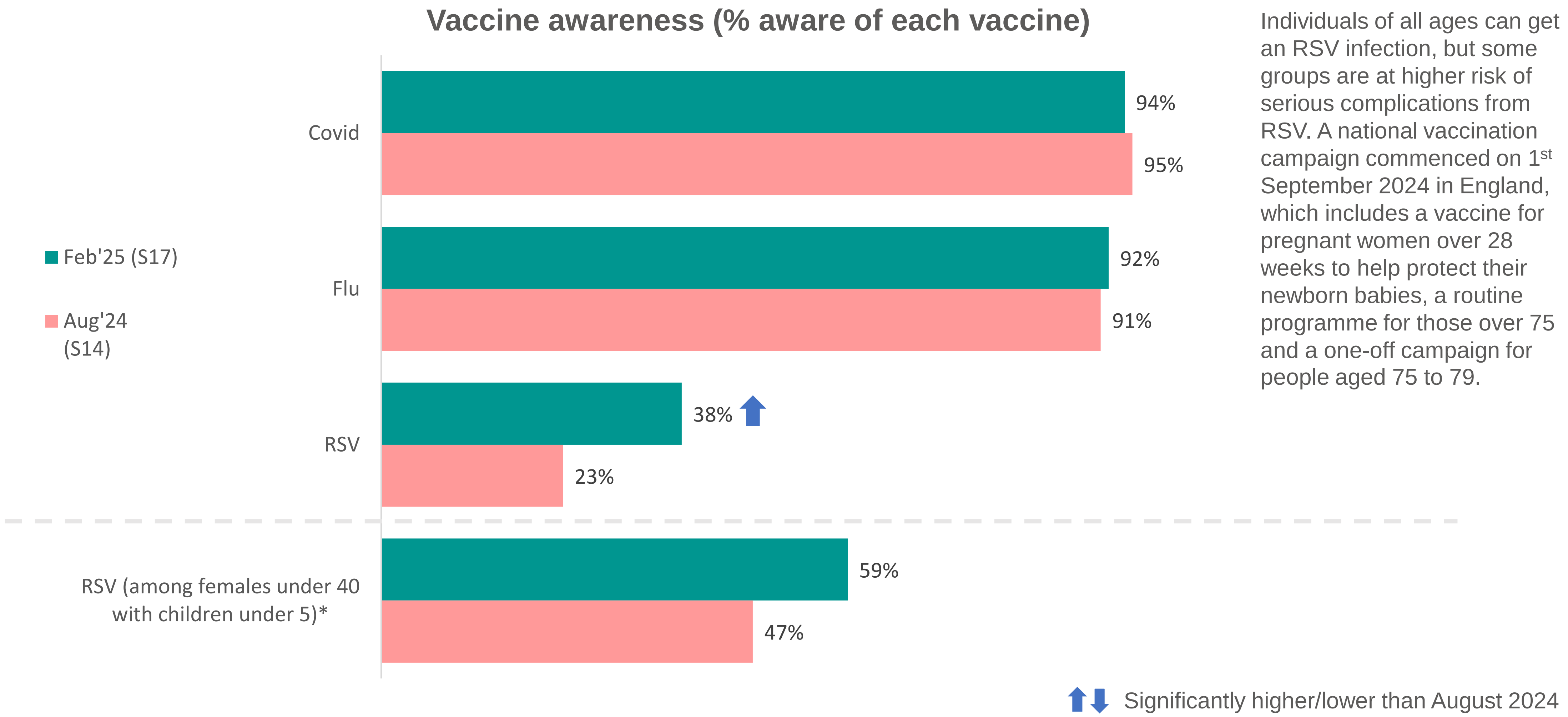
Individual and/or family circumstance:

- Those dissatisfied with their local area (38%)
- Those that think the things they do in their life are not worthwhile (36%)
- *Those who disagree that people from different backgrounds get on well together (29%)*
- Those with very low levels of hopefulness (51%), low levels of life satisfaction (42%) and low levels of happiness (38%)
- Those not in work due to ill health or disability (40%)
- Those who work as sole traders (26%)
- Those who are not satisfied with their job (30%), or with their pay (29%).
- *Those who find it difficult to afford their mortgage (23%)*
- *Those who have a part time paid job (21%)*

* Subgroup analysis uses merged data from S15, S16 and S17 combined. *Italics denotes greater prominence / newly featuring in latest analysis compared to previous wave*

A3. Overall, how hopeful do you feel about your future, where 0 is 'not at all hopeful' and 10 is 'completely hopeful'? A4. How fairly or unfairly do you feel you are treated by society?
Unweighted base: Greater Manchester Residents Surveys 15-17, 4555

In Aug 2024, nearly all (95% and 91%) respondents had heard of the Covid and flu vaccines, but only 23% were aware of the Respiratory Syncytial Virus (RSV) vaccine (including 47% of females under 40 with children under 5). Since then, awareness of RSV appears to have increased (38% overall, and 59% of females under 40 with children)



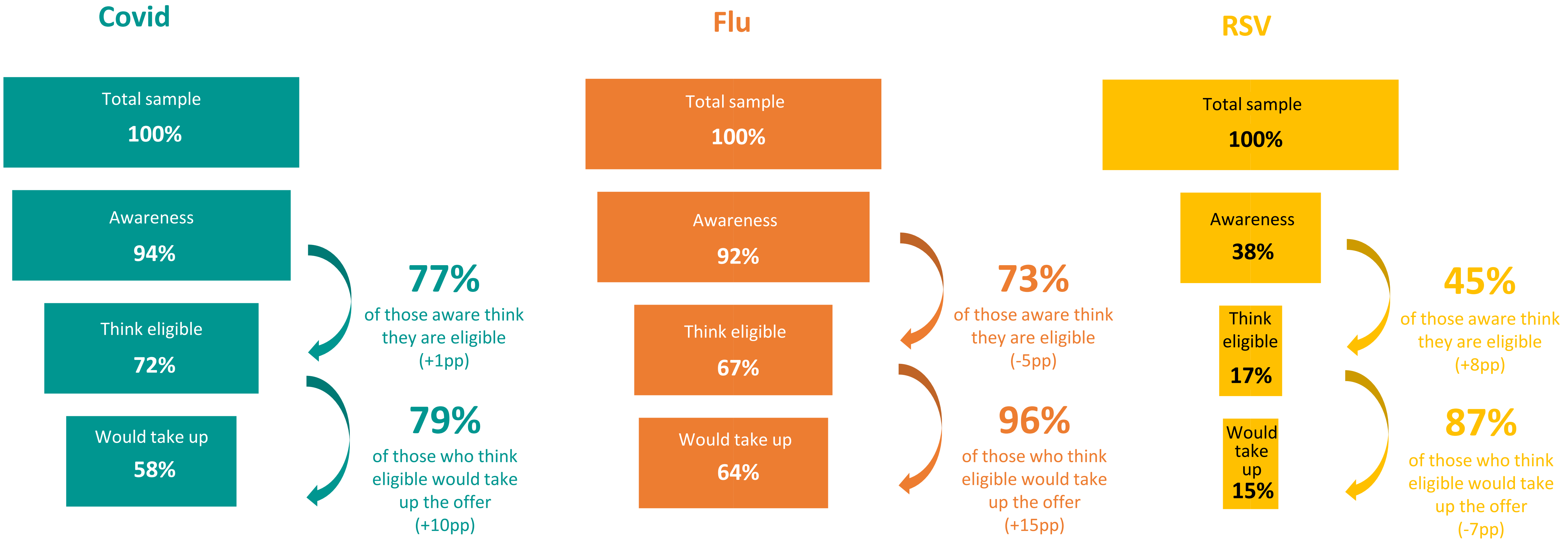
Individuals of all ages can get an RSV infection, but some groups are at higher risk of serious complications from RSV. A national vaccination campaign commenced on 1st September 2024 in England, which includes a vaccine for pregnant women over 28 weeks to help protect their newborn babies, a routine programme for those over 75 and a one-off campaign for people aged 75 to 79.

V1. Have you heard of the following vaccinations? Base: Feb'25 (S17), 1515; Aug'24 (S14), 1482. Females under 40 with children under 5: Feb'25 (S17), 99; Aug'24 (S14), 83. *Smaller base size means differences that appear significant are not statistically so.

As we've seen, awareness of the RSV vaccine is lower than Covid and flu vaccines. However, when considering likelihood of uptake amongst those who believe they are eligible, the picture is somewhat more consistent across each of the three vaccines (79% for Covid, 96% for flu and 87% for RSV).

Vaccine awareness, eligibility and uptake by all respondents

Figures in brackets show change vs. August 2024 (S14)



V1. Have you heard of the following vaccinations? / V2. Do you know whether you are eligible for the following vaccines? / V3. If you are eligible, would you take up the offer of the following vaccines? Base: Feb'25 (S17), 1515.

Unsurprisingly, respondents who are aged 65+ are more likely to be aware and take up the offer of the RSV vaccine. Also, individuals with a sensory disability and those with children under 5 are more likely to be aware and take up the offer of the RSV vaccine as well.

% who are aware of the RSV vaccine (38%) is higher among*:

Demographics:

- Those age 75+ (69%) and those aged 65+ (55%)
- Females under 40 with children under 5 (59%)
- Those with a sensory disability (51%)
- Those who are British (40%)

Individual and/or family circumstance:

- Those with children aged under 5 years old in the house (53%)
- Those who are retired (52%)
- Those who are currently a carer (49%)
- Those who feel very highly about their life being worthwhile (45%)
- Those who are not financial vulnerable (45%)
- Those with a household income of £52,000+ (43%)
- Those who have children (41%)

% who would take up the offer of the RSV vaccine (38%) is higher among*:

Demographics:

- Those age 75+ (70%) and those aged 65+ (57%)
- Those with a sensory disability (59%)
- Those who are bisexual (56%)
- Those who are African (50%)
- Those who are male (43%)
- Those who are Christian (43%)

Individual and/or family circumstance:

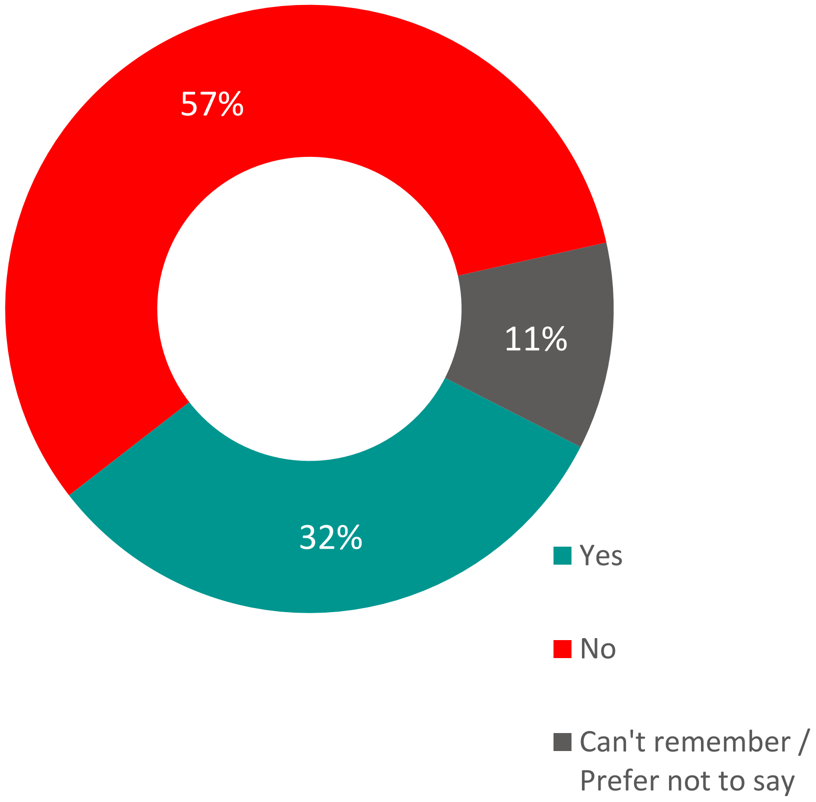
- Those who own their home outright (50%)
- Those with a household income of £78,000 or above (48%)
- Those with children under 5 in the household (48%)
- Those with very high happiness (46%)
- Those who are satisfied with their job (43%)

* Subgroup analysis uses data from S17. Please note we have not used merged data as the difference between S14 and S17 is too great.

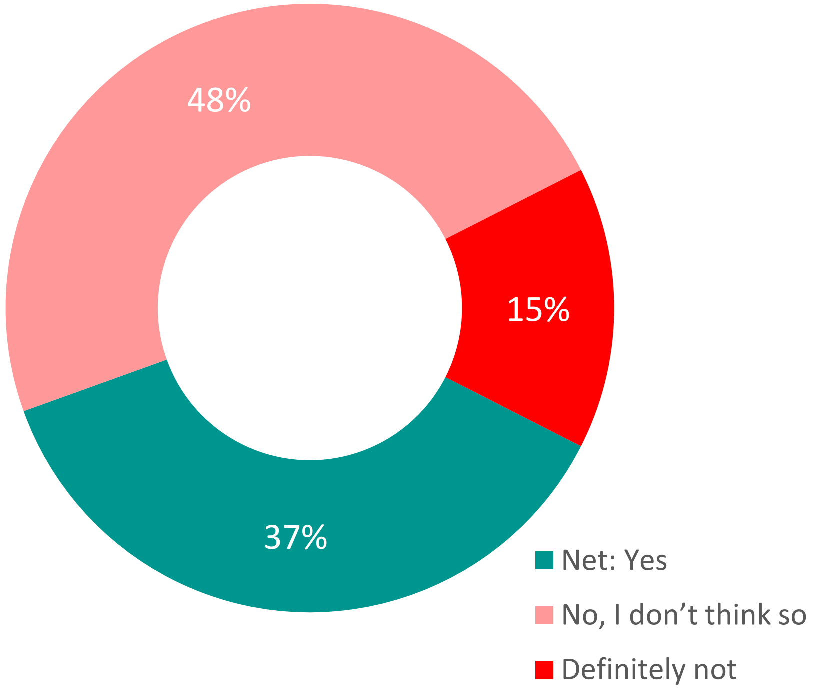
V1. Have you heard of the following vaccinations? - RSV (Respiratory Syncytial Virus). V3. If you are eligible, would you take up the offer of the following vaccines? - RSV (Respiratory Syncytial Virus)
Survey 17: 1515

One third (32%) say they have **heard adverts about winter vaccinations** on local radio across Greater Manchester. When prompted with images of the adverts, 37% of respondents say they had seen them.

Have you heard any adverts about winter vaccinations on local radio across Greater Manchester?



Have you seen any of these the following adverts across Greater Manchester?*



% who have heard any adverts about winter vaccinations on local radio across Greater Manchester is higher among:

Demographics:

- Females under 40 with children over 5 (54%)
- Those with a learning disability (48%)
- Those aged 25-34 (44%)

Individual and/or family circumstance:

- Those likely to lose their job in the next 12 months (48%)
- Those with a household income of £78,000 or above (47%)

V4. Have you heard any adverts about winter vaccinations on local radio across Greater Manchester? Survey 17, 1515/ V5. Have you seen any of the following adverts across Greater Manchester? Base: Feb'25 (S17), 1515. *Respondents were shown image examples of winter vaccinations questions ahead of this question.

Good Work

Good work – context

The GM Residents' Survey includes a number of questions designed to explore residents' experiences of their job and working environment, including the degree of influence and flexibility they have over their work, job satisfaction, and job security. Following a review of the current questions in October 2024, the Good Work section continues to include additional questions exploring employment situation, job stress, and opportunities for personal development among other areas.

This section shows data from Survey 17 (February 2025), Survey 16 (December 2024) and Survey 15 (October 2024) – at times combined to provide a larger base size. This section also reintroduces historic data from previous surveys - Survey 11 (February 2024), Survey 8 (July 2023) and Survey 5 (May 2022) – primarily focusing on job satisfaction, security and flexibility.

2,642 respondents within the survey sample since October 2024, almost 3 in 5 (58%), are employed out of a total sample of 4,555. Most employed respondents in this survey are employed in permanent full-time positions (62%). 17% are permanent part-time positions. Of the remaining respondents, 7% are self-employed sole traders, and 6% are on a fixed term contract.

Good work – key findings (1 of 2)

JOB SATISFACTION & STRESS

- Combined results from between October 2024 to February 2025 shows that:
  - Two thirds (65%) are satisfied with their job
  - Half (50%) are satisfied with their pay
  - Almost 7 in 10 (68%) are satisfied with their hours
- When comparing these results to historic data available, job satisfaction is lower than it was compared to December 2022 (71%) – with the same true for satisfaction with hours (76% in December 2022). However, pay satisfaction has remained relatively stable across the different time periods and records the same satisfaction figure as in December 2022 (50%).
- In February 2025, three quarters (75%) continue to say that their job involves high levels of stress or pressure at least sometimes. Somewhat more positively, the proportion of respondents working beyond their contracted hours has settled, following an apparent spike in December. No historical tracking data is available on job stress.

JOB SECURITY (QUESTION USES COMBINED DATA FROM OCT’24-FEB’25)

- Among employed respondents we have surveyed since October 2024, 15% think they will lose their job in the next 12 months. This is significantly higher for those earning below the Real Living Wage (27%). This is lower than the figure recorded in February 2024, where 19% thought they would lose their job in the next year, but is in line with figures recorded in both December 2022 (16%) and July 2023 (16%).

FLEXIBILITY (ALL QUESTIONS USE COMBINED DATA FROM OCT’24-FEB’25)

- Experiences of job flexibility appear to have somewhat improved compared to February 2024. Fewer employed respondents say it is difficult to arrange an hour off work due to personal reasons (34% cf. 40%) or difficult to ask to vary their work hours (44% cf. 49%). Also, fewer respondents disagree that they can decide what time to start and finish work (41% cf. 45%). When looking back further, there are some nuances / fluctuations in figures recorded in December 2022 and July 2023, but the picture remains broadly positive overall.

Good work – key findings (2 of 2)

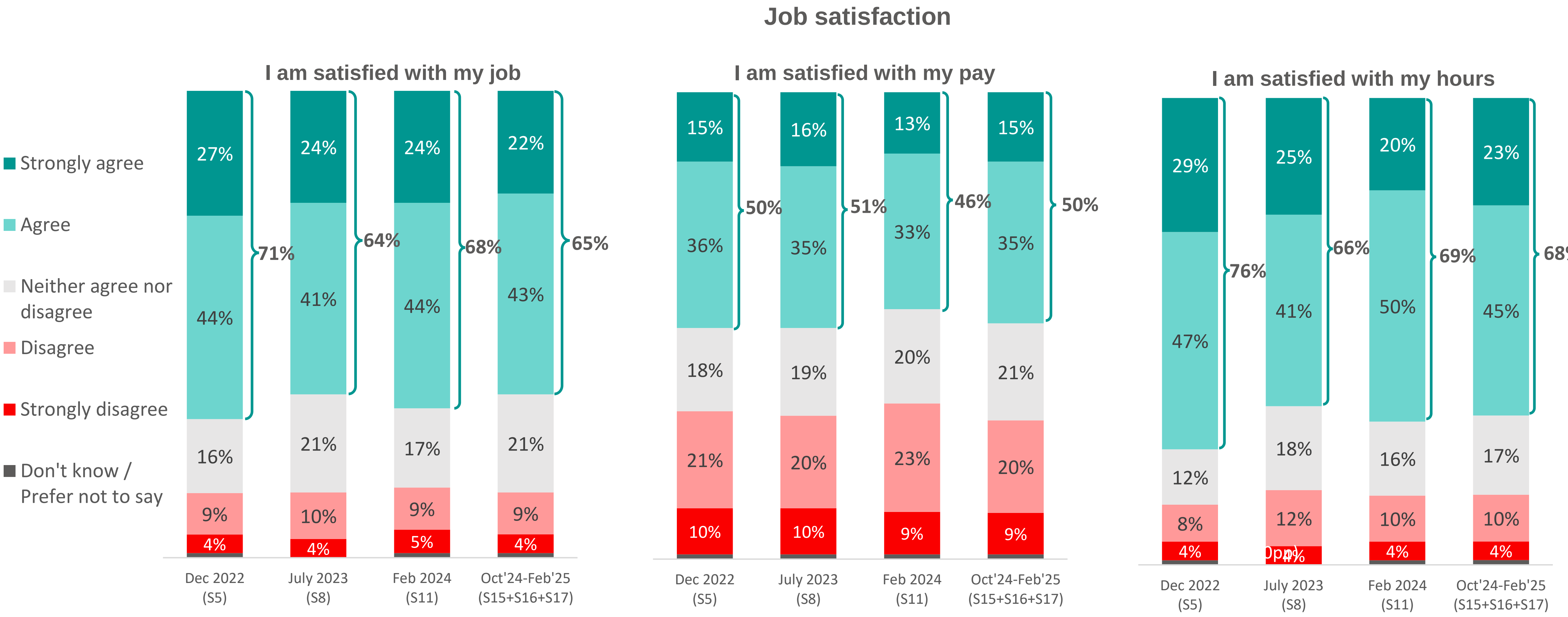
INFLUENCE (ALL QUESTIONS USE COMBINED DATA FROM OCT'24-FEB'25)

- Looking at figures from the last three waves (Oct 2024 – Feb 2025), people's perceived ability to influence their work has largely remained unchanged. However, viewed over a longer period going back over two years ago, people's perceptions of their ability to influence their work has slightly improved
    - 14% say they do not have much influence over deciding what task to do next (cf. 16% in Oct 2024; 14% in Feb 2024; 18% Dec 2022);
    - 12% say they do not have much influence on deciding how to do the task (cf. 13% in Oct 2024; 13% in Feb 2024; 15% in Dec 2022);
    - 17% say they have little influence over the pace of their work (cf. 20% in Oct 2024; 18% in Feb 2024; 24% in Dec 2022)

PERSONAL DEVELOPMENT (ALL QUESTIONS USE COMBINED DATA FROM OCT'24-FEB'25)

- After asking this question for three consecutive waves, we have combined data concerning professional development and training opportunities. Across October 2024 to February 2025:
    - 7 in 10 (72%) agree that their job makes good use of their skills and abilities. Only 12% disagree that this is the case.
    - 4 in 5 (83%) say their job requires them to learn new things at least sometimes. Over 1 in 10 (13%) say that their job always requires them to learn new things.
    - However, 1 in 5 (22%) have been not provided with any opportunities in professional development or training. This figure is higher for those in the private sector (25%) and for part-time employees (31%). Over half (56%) have been provided with between 1 and 4 opportunities.

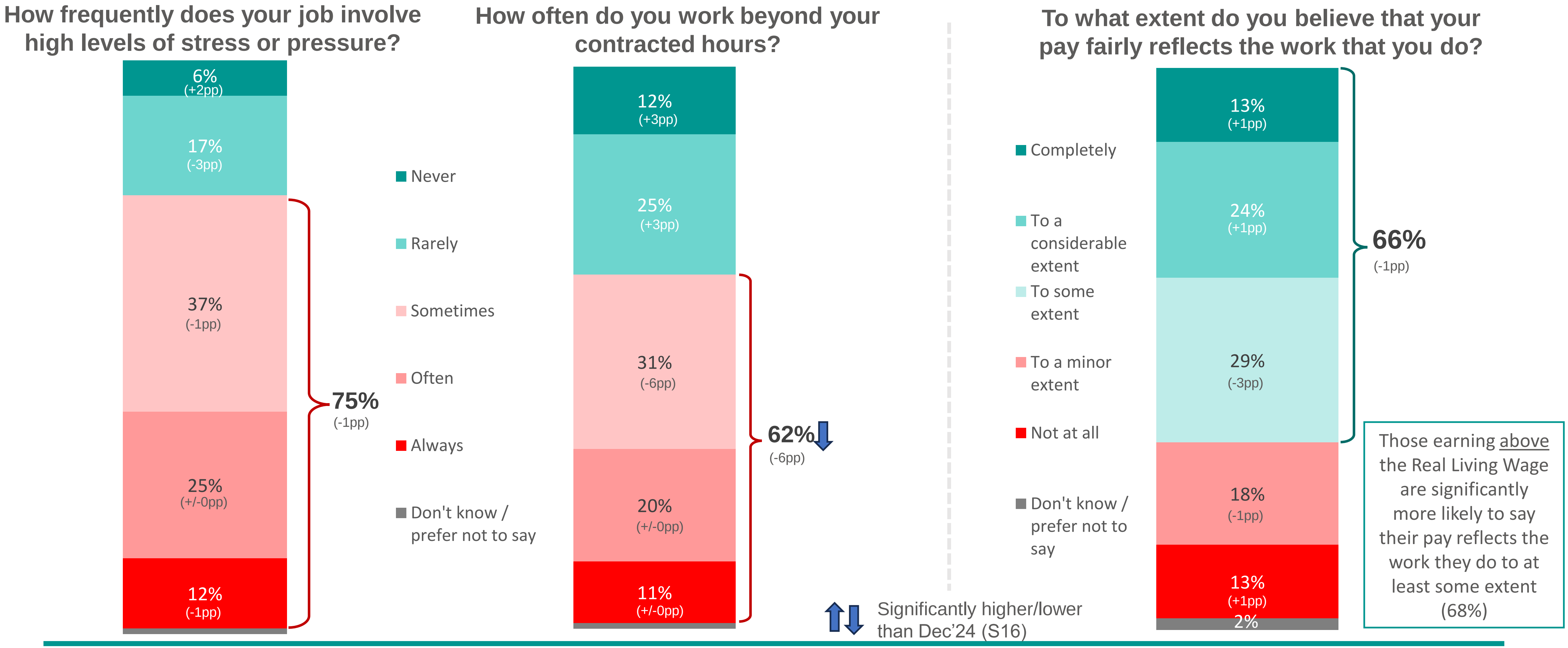
When combining results from Oct 2025 to Feb 2025, job satisfaction sits at 65%, pay satisfaction at 50% and hours satisfaction at 68%. Historically, the proportion who agree with each satisfaction aspect has fluctuated – though both job and hours satisfaction were higher in December 2022.



GW8. How much do you agree or disagree with the following statements?
Base: 910 (S5), 859 (S8), 1004 (S11, Rapid response panel employed residents)

In February 2025, three quarters (75%) continue to say that their job involves high levels of stress or pressure at least sometimes. Somewhat more positively, the proportion of respondents working beyond their contracted hours has settled, following an apparent spike in December.

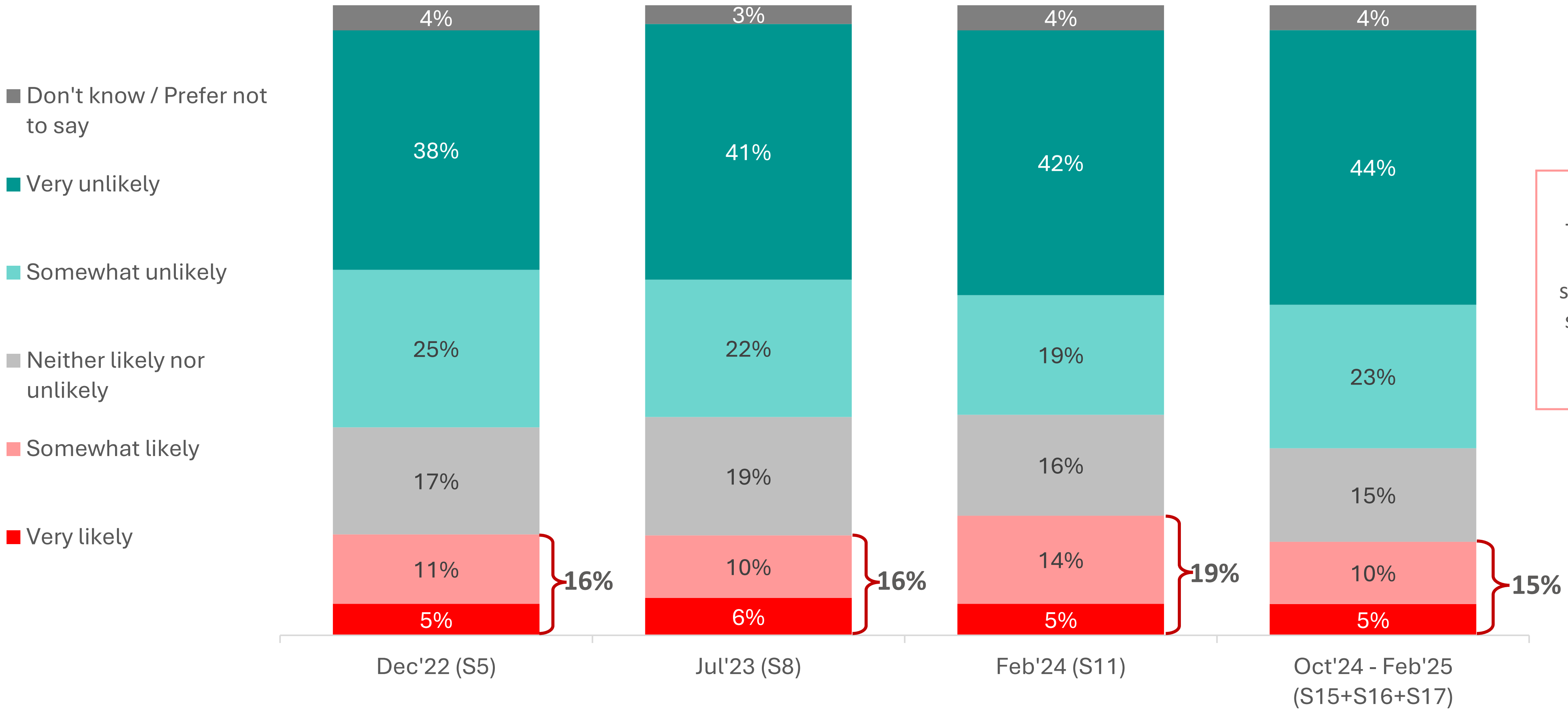
Figures in brackets show change since Dec ‘24 (S16)



GW2_3. How frequently does your job involve high levels of stress of pressure? / GW2_5. How often do you work beyond your contracted hours? Base: Those who are employed Dec’24 (S16) 774, Feb’25 (S17) 750. / GW2_6. To what extent do you believe that your pay fairly reflects the work that you do? Base: Those who are employed Dec’24 (S16) 774, Feb’25 (S17) 750.

Looking back at historic data, there has been relative stability in the proportion of those who believe they will lose their job within the 12 months following the survey. Taking a view of combined results since October 2024, this sits at 15% of respondents – though this is far higher (27%) amongst those earning below the Real Living Wage.

How likely do you think you are to lose your job and become unemployed in the next twelve months?

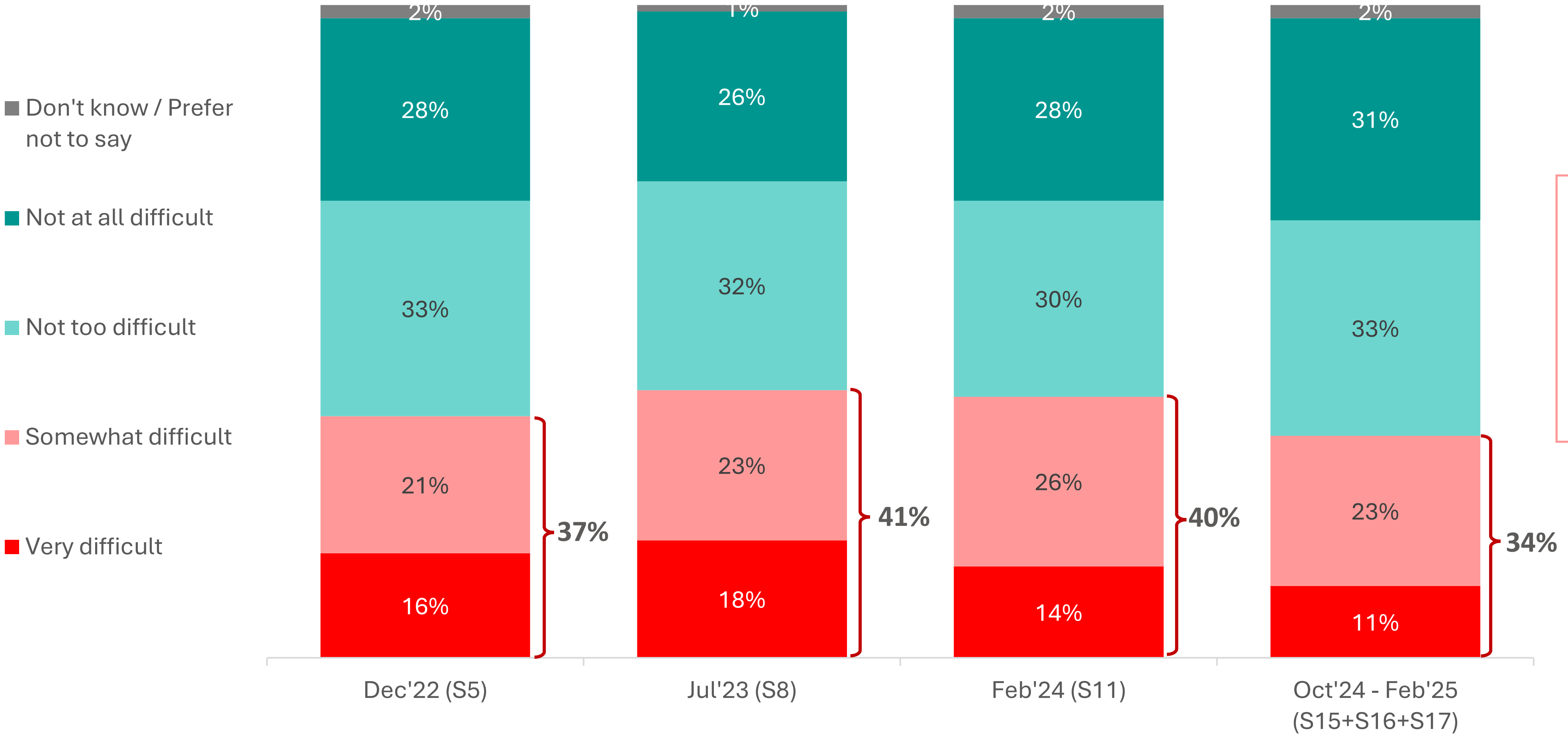


Oct'24 – Feb'25
Those earning <u>below</u> the Real Living Wage are significantly more likely to say they are likely to lose their job in the next 12 months (27%)

GW_6AI. How likely do you think you are to lose your job and become unemployed in the nest twelve months?. Base: Those who are employed Feb'25 (S17), 822.

1 in 3 respondents since October 2024 (34%) have reported finding it **difficult to arrange time off work during work hours for a personal matter**, lower than the reported difficulty in July 2023 (41%) and February 2024 (40%).

Arranging to take an hour off work during work hours to take care of personal or family matters

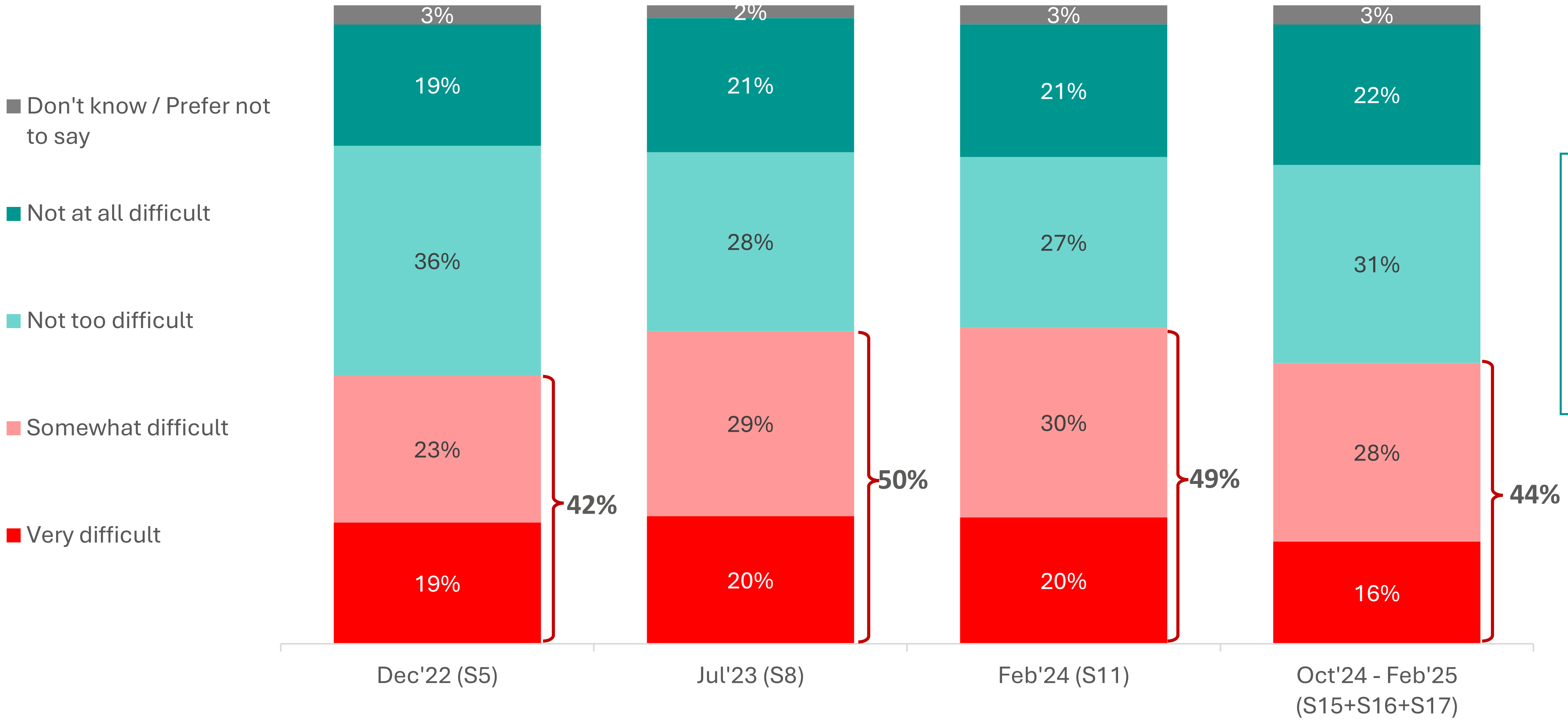


Oct'24 – Feb'25
Those earning below the Real Living Wage are significantly more likely to find it difficult to arrange time off work to take care of a personal or family matter (42%)

GW3. How difficult would you say the following aspects of work are? Arranging to take an hour or two off during work hours to take care of personal or family matters

Experiences of job flexibility also appear to have improved somewhat in terms of respondents finding it difficult in asking to vary work hours. Roughly half of respondents reported this as difficult in July 2023 (50%) and February 2024 (49%), but more recent results from October 2024-February 2025 are more positive (those reporting difficulties has dropped to 44%).

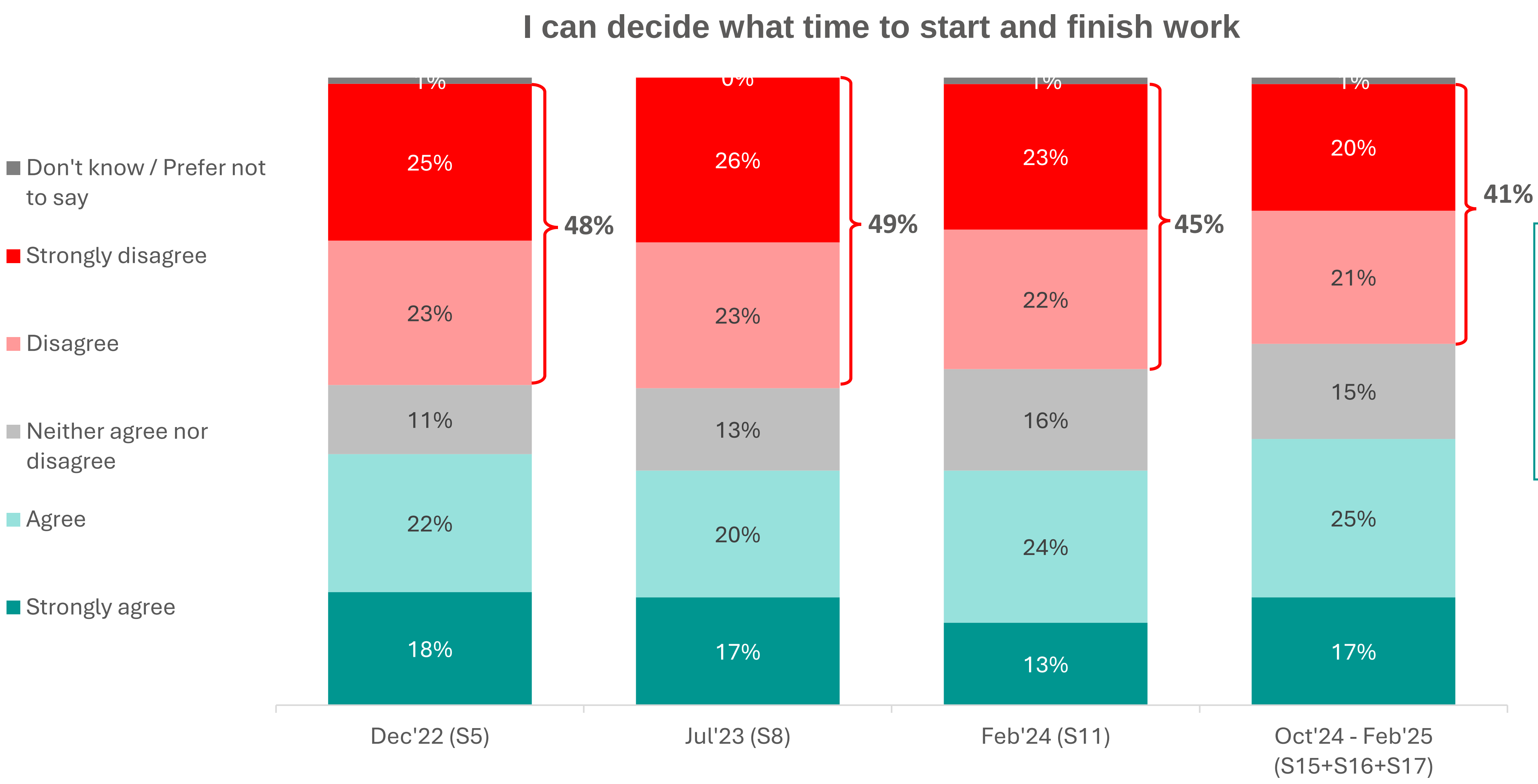
Asking to vary your work hours



Oct'24 – Feb'25
Those earning above the Real Living Wage are significantly more likely to find it difficult to ask to vary their work hours (42%)

GW3. How difficult would you say the following aspects of work are? Asking to vary your working hours

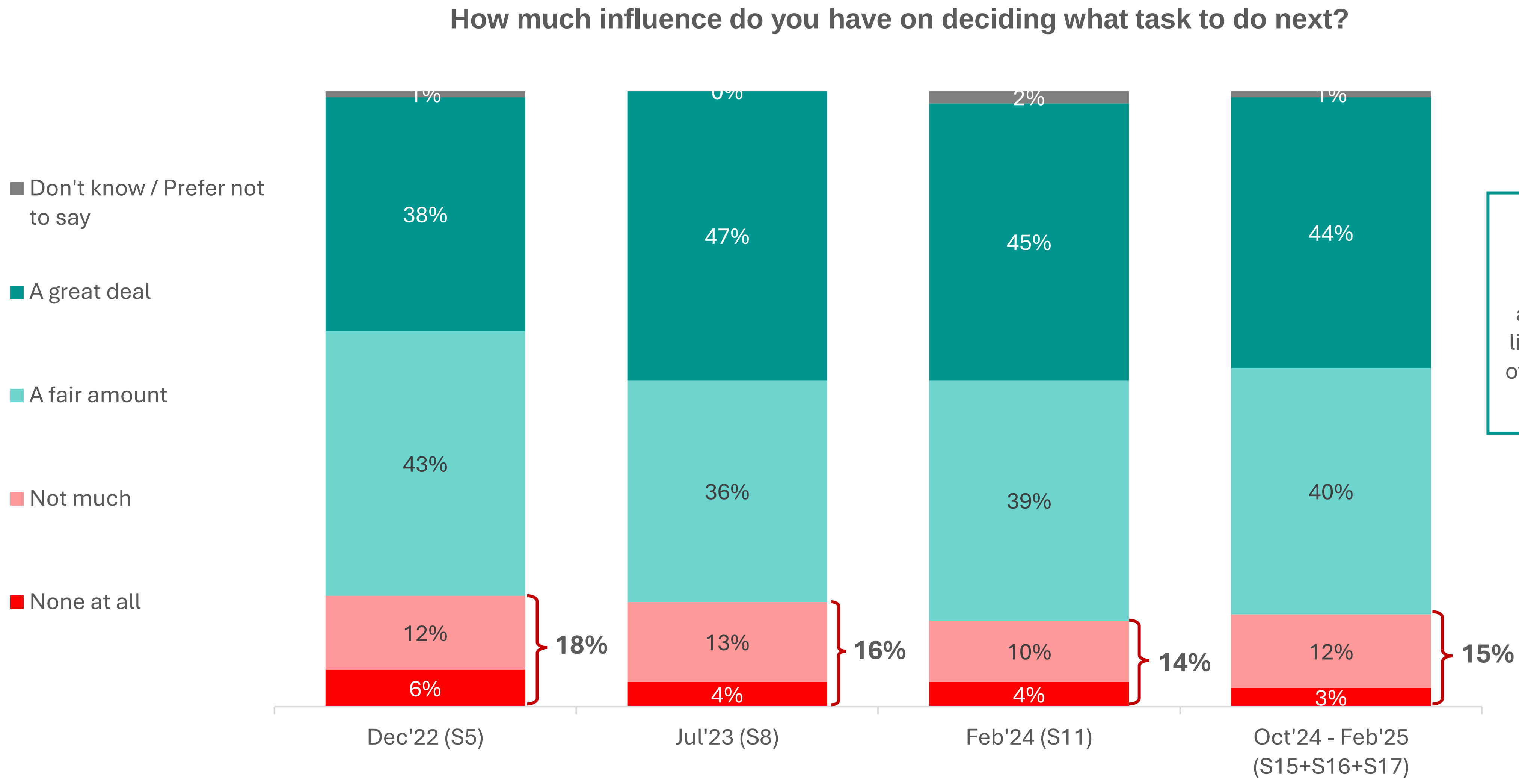
2 in 5 (41%) respondents since October disagree that they can decide what time to start and finish work, an improved position compared to results historically. Those earning above the Real Living Wage are more likely to disagree that they can decide what time to start and finish work.



Oct'24 – Feb'25
Those earning above the Real Living Wage are significantly more likely to disagree that they can decide what time to start and finish work (43%)

GW8. How much do you agree or disagree with the following statements?

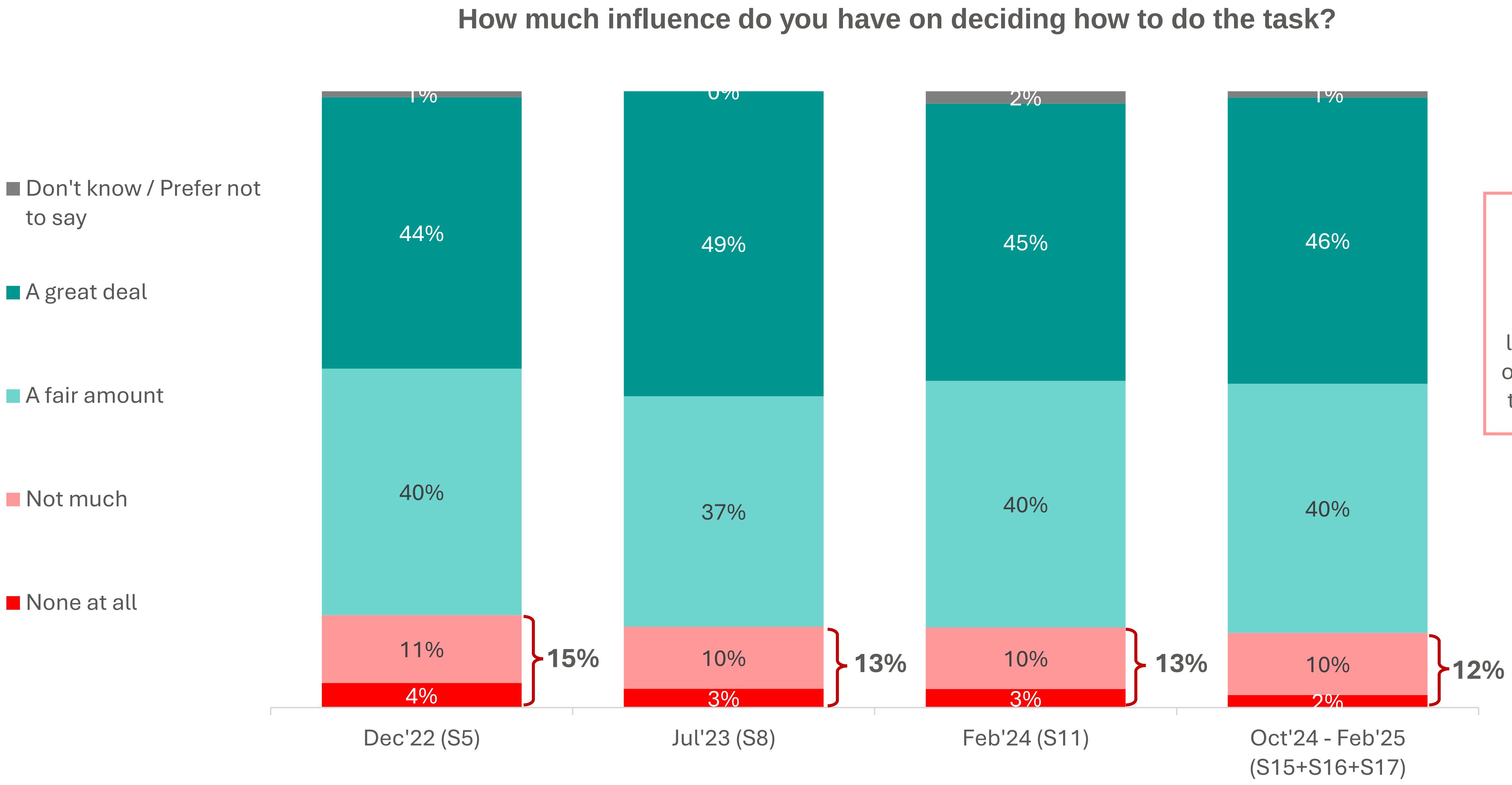
15% say they have no influence, or not much influence on what task they do next. Within the past year, perceptions of people's ability to influence their work has largely remained in line with figures from February 2024 and October 2024. However, viewed over a longer period, people's perceptions of their ability to influence their work have slightly improved



Oct'24 – Feb'25
Those earning above the Real Living Wage are significantly more likely to have influence over deciding what task to do next (85%).

GW1. How much influence do you personally have on…?
Base: Dec'22 (S5), 704, Jul'23 (S8) 807, Feb'24 (S11), 674, Oct'24-Feb'25 (S15+S16+S17), 2642 (All employed)

With regards to influence on approach to how tasks are undertaken, the proportion who report not much influence or no influence at all has decreased over time.

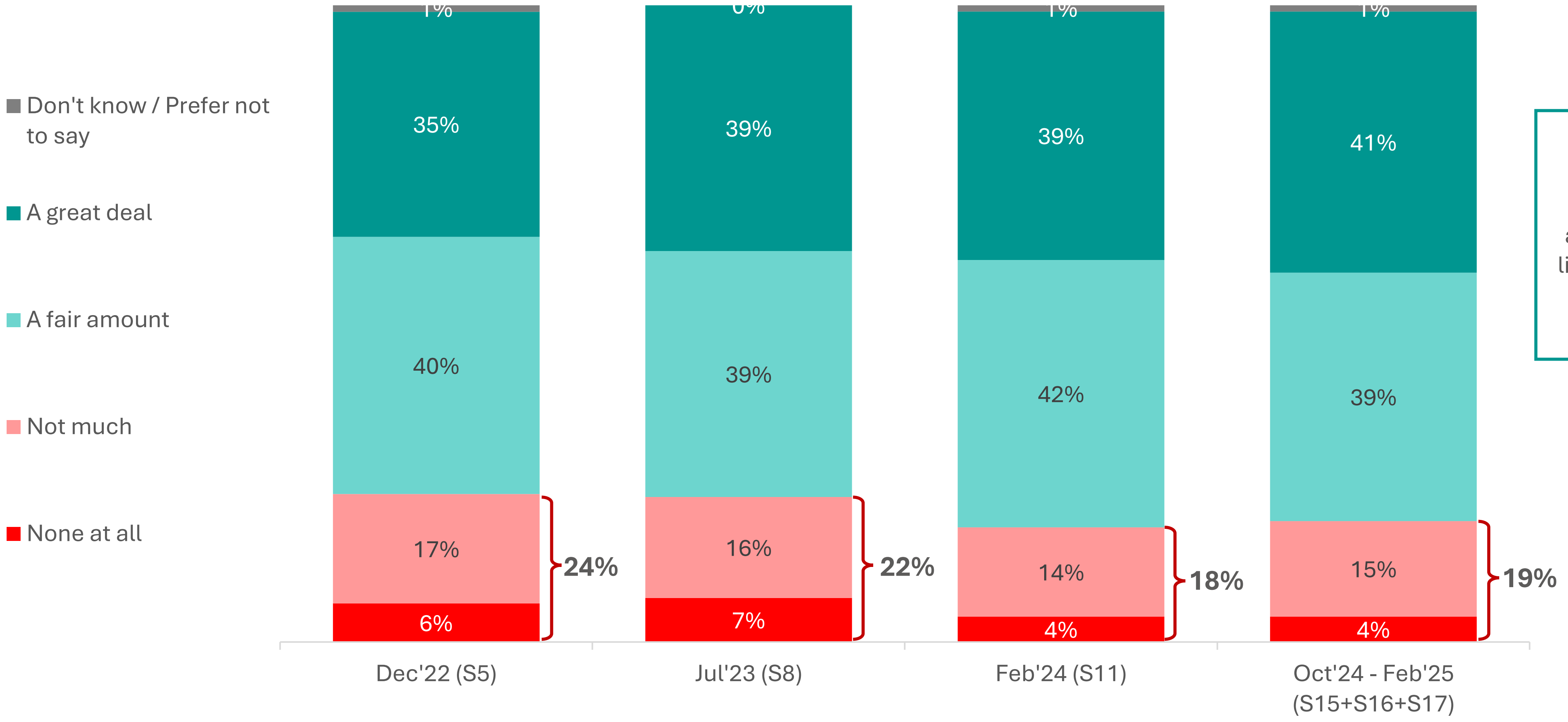


Oct'24 – Feb'25
Those earning below the Real Living Wage are significantly less likely to have influence over deciding how to do the task (80% vs 86%).

GW1. How much influence do you personally have on…?
Base: Dec'22 (S5), 704, Jul'23 (S8) 807, Feb'24 (S11), 674, Oct'24-Feb'25 (S15+S16+S17), 2642 (All employed)

Regarding the pace of their work, 1 in 5 (19%) say they have no or not much influence over this aspect of work. Viewed over time, a greater proportion of employed respondents felt this way in December 2022 (24%) and July 2023 (22%).

How much influence do you have on the pace of your work?

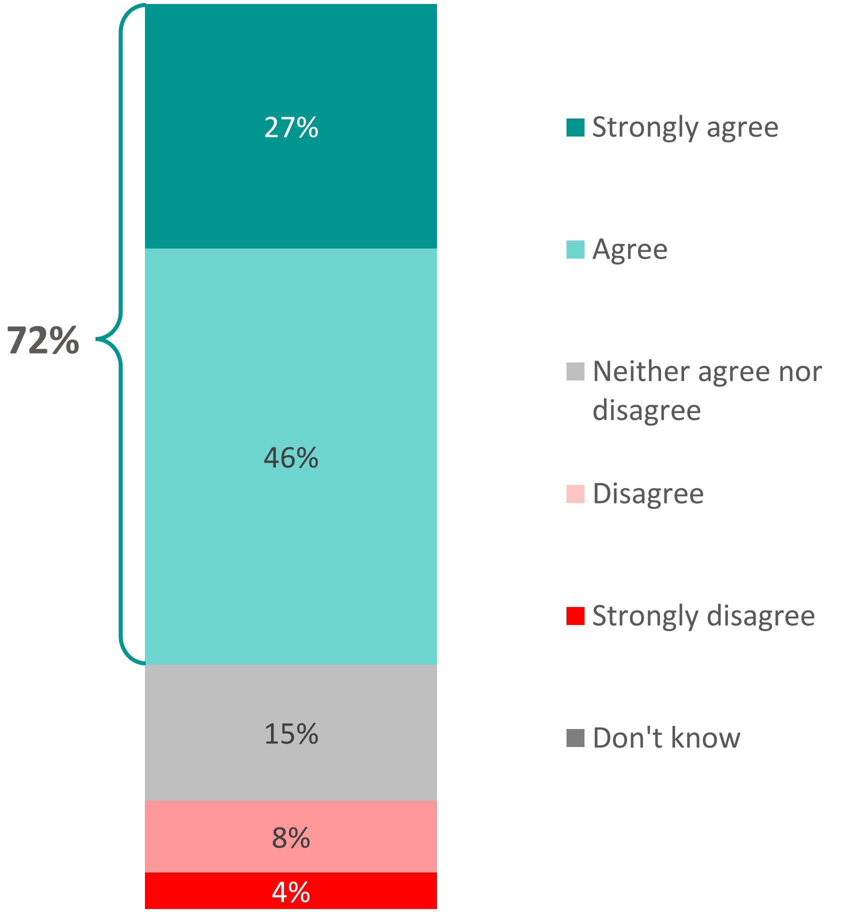


Oct'24 – Feb'25
Those earning above the Real Living Wage are significantly more likely to have influence over the pace of their work (82%).

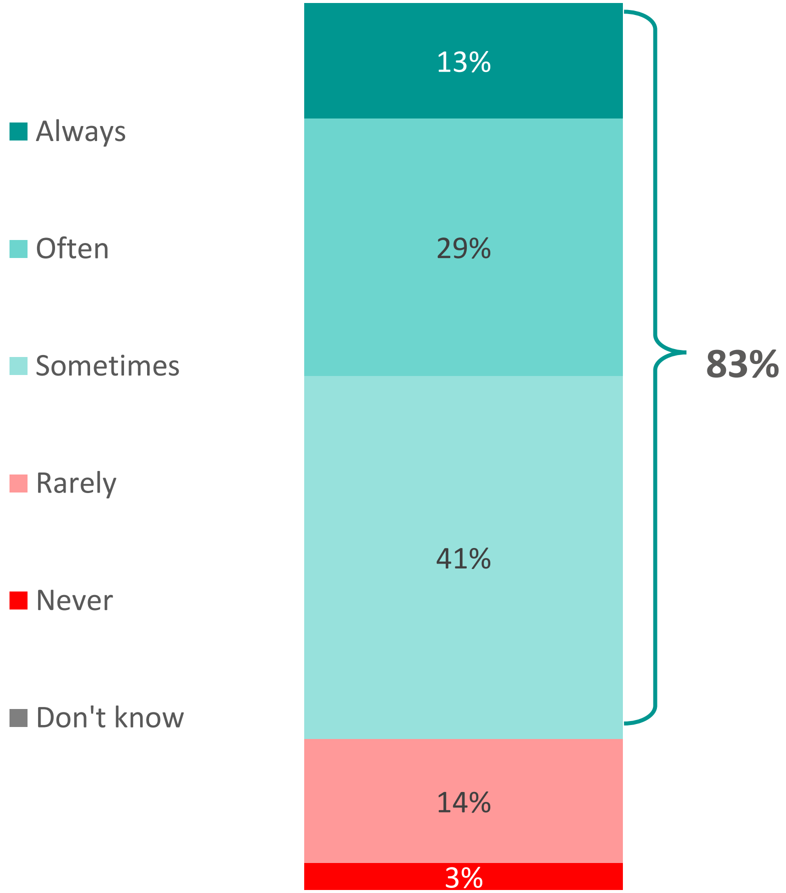
GW1. How much influence do you personally have on…?
Base: Dec'22 (S5), 704, Jul'23 (S8) 807, Feb'24 (S11), 674, Oct'24-Feb'25 (S15+S16+S17), 2642 (All employed)

7 in 10 agree that their job makes good use of their skills and abilities, a drop from December 2024 (74% cf. 70%). 4 in 5 (81%) report that their job requires them to learn new things at least sometimes, which is a small decrease from last wave at 84%. No long-term comparisons are available on these measures.

To what extent do you agree or disagree that your job makes good use of your skills and abilities?



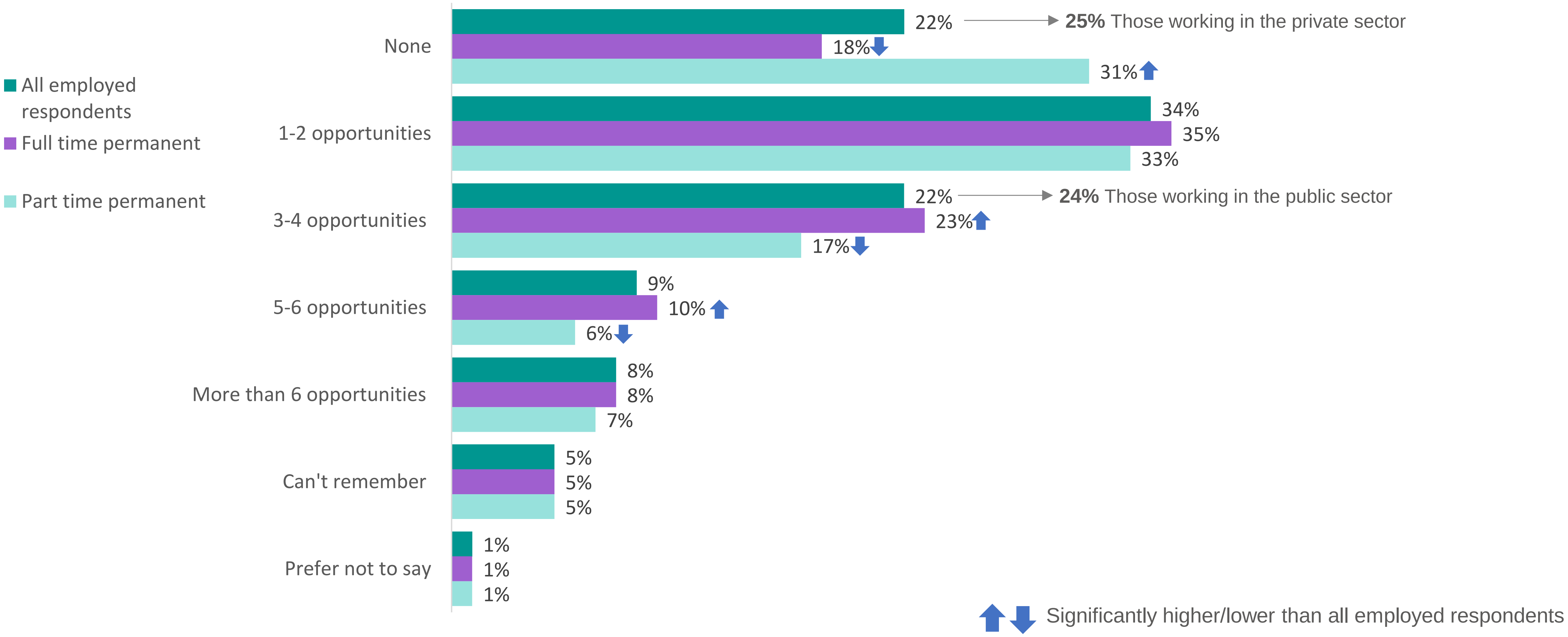
How often does your job require you to learn new things?



GW2_2. To what extent do you agree or disagree with the following statement: My job makes good use of my skills and abilities / GW2_1. How often does your job require you to learn new things?
Base: All online respondents who are employed, Oct'24-Feb'25 (S15+S16+S17), 2275.

One fifth (22%) have been provided with no professional development or training opportunities in the past year. This is higher amongst those in the private sector (25%) and for part-time employees (31%).

How many professional development or training opportunities have been available to you in the past 12 months? Oct’24 – Feb’25 (S14+S15+S16 combined)



GW2_7.How many professional development or training opportunities have been available to you in the past 12 months? Base: All online respondents who are employed, Oct’24-Feb’25 (S15+S16+S17), 2275; All in full time permanent employment, Oct’24-Feb’25 (S15+S16+S17), 1659; All in part time permanent employment Oct’24-Feb’25 (S15+S16+S17), 503.

Your Local Area

Your local area – context

The survey continues to explore residents' experiences of their local area, along with their sense of community, local pride and belonging. The questions have been included to inform local monitoring and evaluation of programmes aiming to increase pride in place and life chances (including those funded through local growth funds such as the UK Shared Prosperity Fund). Given that the questions place a focus on community relationships and dynamics, they are also increasingly going to be used to monitor and evaluate progress against Greater Manchester's Live Well ambitions.

As questions on local area have been asked across multiple surveys, we have tracked data over time. We have also merged data where possible, meaning that the sample is larger and more robust and greater analysis of sub-groups is possible. Questions within this section use a merged sample from the results from surveys 15, 16 and 17.

Benchmarks, where included, reflect most recent published national data from two sources:

1. The DCMS' Community Life Survey (covering October 2023 – March 2024) – this source references benchmarking figures for England only.
2. UK Measures of National Well-being (covering 6 November 2024 – 1 December 2024) – this source references benchmarking figures for Great Britain.

Please note the DCMS' Community Life Survey is a household online and paper self-completion study. Differences in methodology between the two surveys mean that there will be some modal impacts on answers provided by respondents. As a result, comparisons between them are meant to be illustrative.

England benchmarking figures taken from the DCMS Community Life Survey. This report was published on 4 December 2024 and relates to fieldwork between October 2023 and March 2024. GB benchmarking figures taken from the UK Measures of National Well-being - Office for National Statistics (ons.gov.uk). This figure was published 20 December 2024 and relates to fieldwork undertaken on behalf of ONS between 6 November to 1 December 2024.

Your local area – key findings (1 of 2)

OVERALL SATISFACTION WITH LOCAL AREA

- Just under 3 in 4 (74%) are satisfied with their local area as a place to live. This GM figure is in line with the England benchmark, having temporarily been higher in December (76%). Positively, there has been a consecutive increase in the proportion of GM respondents who are ‘very satisfied’ over the last three waves (26% in February 2025; 25% in December 2024; 22% in October 2024).
- Over three quarters (78%) of respondents would recommend their local area as a place to live, which again is in line with the previous two waves. As seen with satisfaction with their local area, those that ‘definitely agree’ that they would recommend their area as a place to live has also further increased (29% in February 2025; 28% in December 2024; 25% in October 2024).

NEIGHBOURHOOD AND COMMUNITY

- Agreement with statements about neighbourhood relations have decreased slightly since last wave. 4 in 5 (80% cf. 82% in December) agree people from different backgrounds get on well together in their local area, with 3 in 4 agreeing that people look out for each other (74% cf. 76%). The proportion of respondents saying they are proud of their local area has significantly decreased to 70% from 75% in December 2024.

SATISFACTION WITH TRANSPORT, TRAVEL AND URBAN PUBLIC REALM

- Two thirds (67%) of respondents continue to be satisfied with the general availability of public transport in their local area. Levels of satisfaction with specific options are as follows: 3 in 5 (59%) respondents reported satisfaction with bus services, followed by train and tram services at both just under one-half (46%).
- Satisfaction with cycle lanes remains stable, now at 31%.
- Respondents who are satisfied with the conditions of roads in their local area has been steadily increasing over the past several waves – from 30% in July to 32% in August to 35% in October, then reporting at 37% in December. However, this trend reversed in February 2025, with satisfaction with the conditions of local roads significantly decreasing to 3 in 10 (30%) respondents.
- Throughout 2024, satisfaction with the condition of paved areas remained fairly constant at under 50% (47% in December 2024), besides a dip in this metric in July 2024 (S13). In Feb 2025 there has been a small dip to 44%, however this remains essentially in line with the previous waves (no significant change).

Your local area – key findings (2 of 2)

LONELINESS

- Having been introduced in August / September 2024, the survey continues to track data on how often respondents feel lonely. This shows that the proportion of respondents who feel lonely at least some of the time has decreased significantly compared to October 2024 (was 31%, now 27%). Encouragingly as well, there has been a corresponding increase in those that say they never feel lonely (was 20%, now 24%) – and this is temporarily significantly higher than the GB average.
  - Loneliness remains high(er) amongst those with a disability (41% lonely at least some of the time), younger respondents aged 18-24 (47%) and those with a lower household income (43%).
- Absence of support networks can be both a contributor to, and a reflection of, personal feelings of loneliness. Four in five (79%) of respondents agree that if they wanted company or to socialise, they would have someone to call on (stable when compared to 80% in December 2024). 83% of GM respondents also agree that there are people who would be there for them if they needed (cf. 84% in December).
  - However, GM respondents are significantly less likely to agree with these statements than people across the country as a whole, according to comparisons with DCMS surveys. The proportion “definitely disagreeing” that people would be there if the needed help has also seen a short-term significant increase.

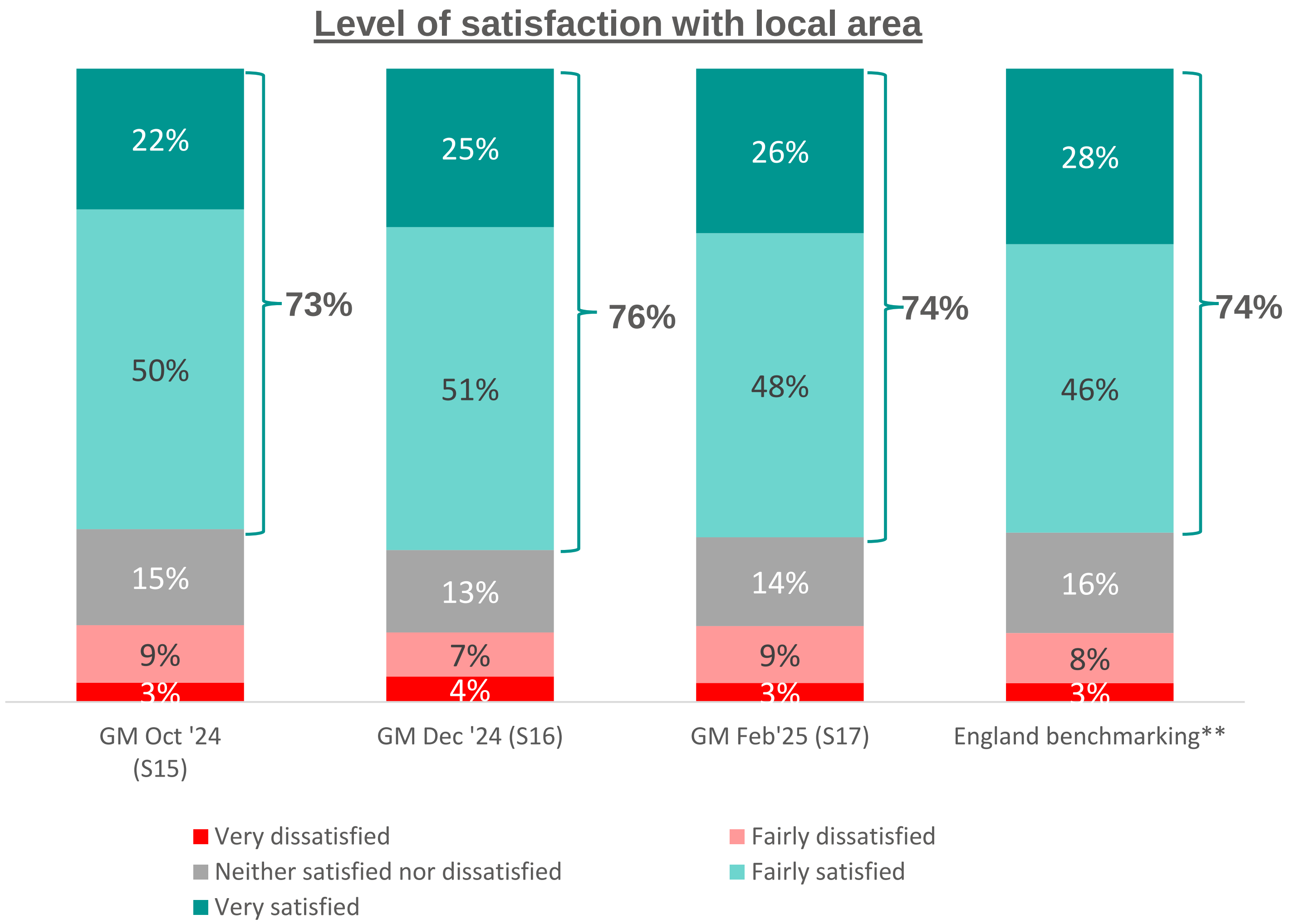
INVOLVEMENT IN GROUPS, CLUBS OR ORGANISATIONS

- Respondent involvement in a group, club, or organisation in the last 12 months is analysed using the past three waves’ data (S15-S17). Over half (55%) of this sample report being involved in any kind of group, club or organisation (remaining the same when compared against S14-16).
  - The most popular type of group, club or organisation to have been involved in is sport / exercise (which includes taking part, coaching, or going to watch), with just under one-quarter (24%) having been involved in this in some way. After sport / exercise, hobbies (15%) and religion (15%) are the next most frequently referenced options. Excluding sport, half (48%) are involved in any type of group, club or organisation.

VOLUNTEERING

- Three in ten (30%) respondents report that they have volunteered in the last year, which remains mostly consistent with previous waves.
  - Certain ethnic groups from racially minoritised communities are more likely to have volunteered, such as Black or Black British or African respondents. Propensity to volunteer is also associated in most recent data with higher incomes, and business ownership.

Overall satisfaction with their local area as a place to live has remained broadly stable compared to the previous two waves. Positively, the proportion of those who are 'very satisfied' has steadily increased over the same time period. Overall, GM respondents appear temporarily equally satisfied when compared to the England benchmark



% with 'low' satisfaction of local area compared to Surveys 15-17 GM average (12%)*

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

Demographics:

- Those with a disability (18%) including those with a sensory disability (24%), mental ill health (23%), or mobility disability (19%)
- *Those who are not heterosexual (17%)*
- *Those aged 55-64 (16%)*

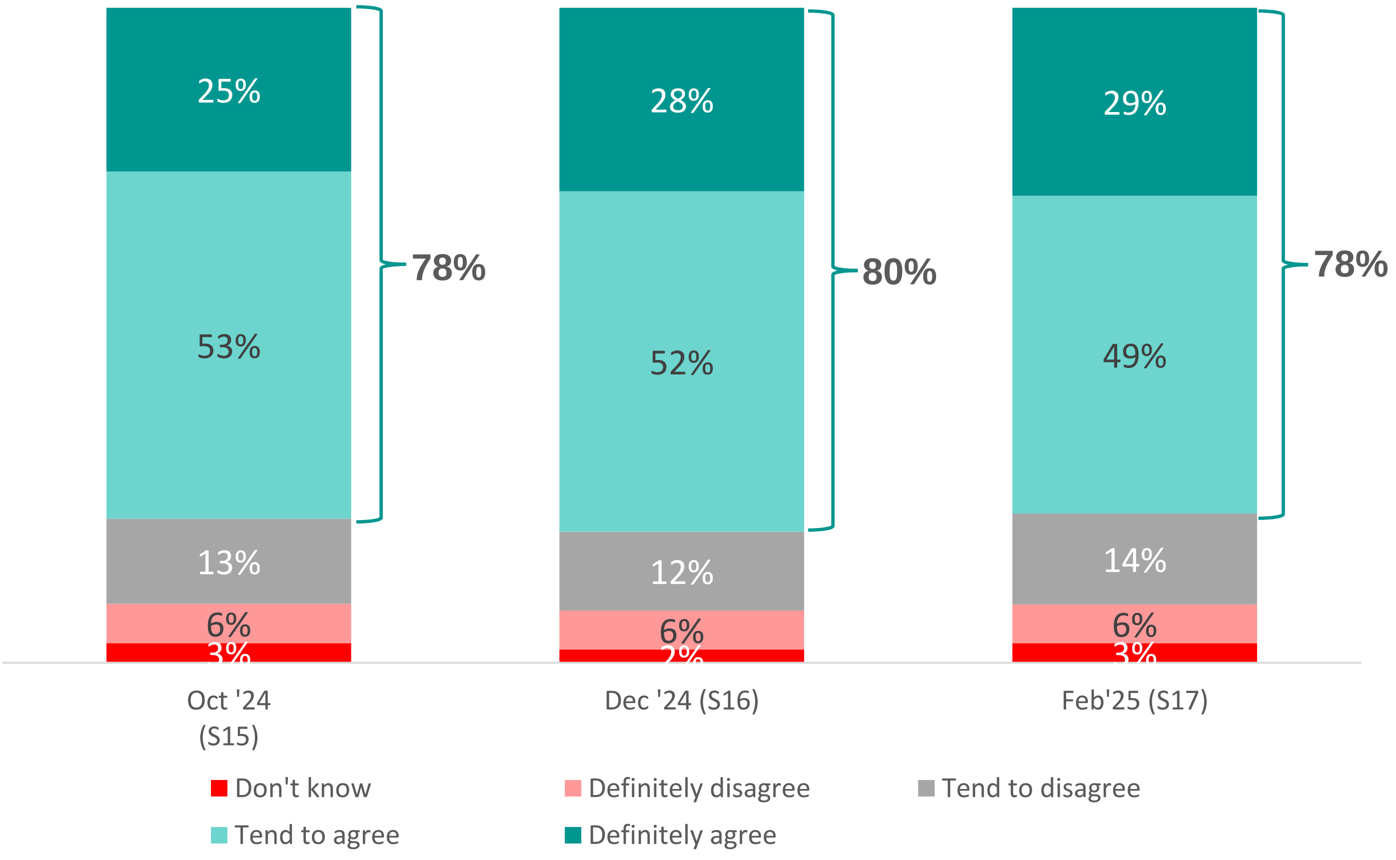
Individual and/or family circumstance:

- Those who would not recommend their local area as a place to live (51%)
- Those who disagree that people from different backgrounds get on well together (33%)
- *Those who disagree that there are cultural opportunities (25%)*
- Those not in work due to ill health or disability (22%)
- Those with very low levels of hopefulness (22%)
- Those who are considered financially vulnerable (20%)
- Those who rent from a housing association or trust (19%)
- *Those with children in the house age 19-25 (16%)*

LA2. Overall, how satisfied or dissatisfied are you with your local area as a place to live? *Relates to respondents who are fairly dissatisfied and very dissatisfied.
Unweighted base: Greater Manchester Residents S14, 1482; S15, 1506; S16, 1523; S17 (Feb '25), 1515 **England benchmarking taken from DCMS Community Life Survey (fieldwork October 2023-March 2024).

Recommendation of their local area as a place to live has remained stable and is back in line with October 2024 (78%), which is higher than the England average of two-thirds (66%).Those less likely to recommend include respondents with a disability and those with a mixed ethnicity.

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



% who would not recommend their area as a place to live compared to S15-17 GM average (19%)*

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

Demographics:

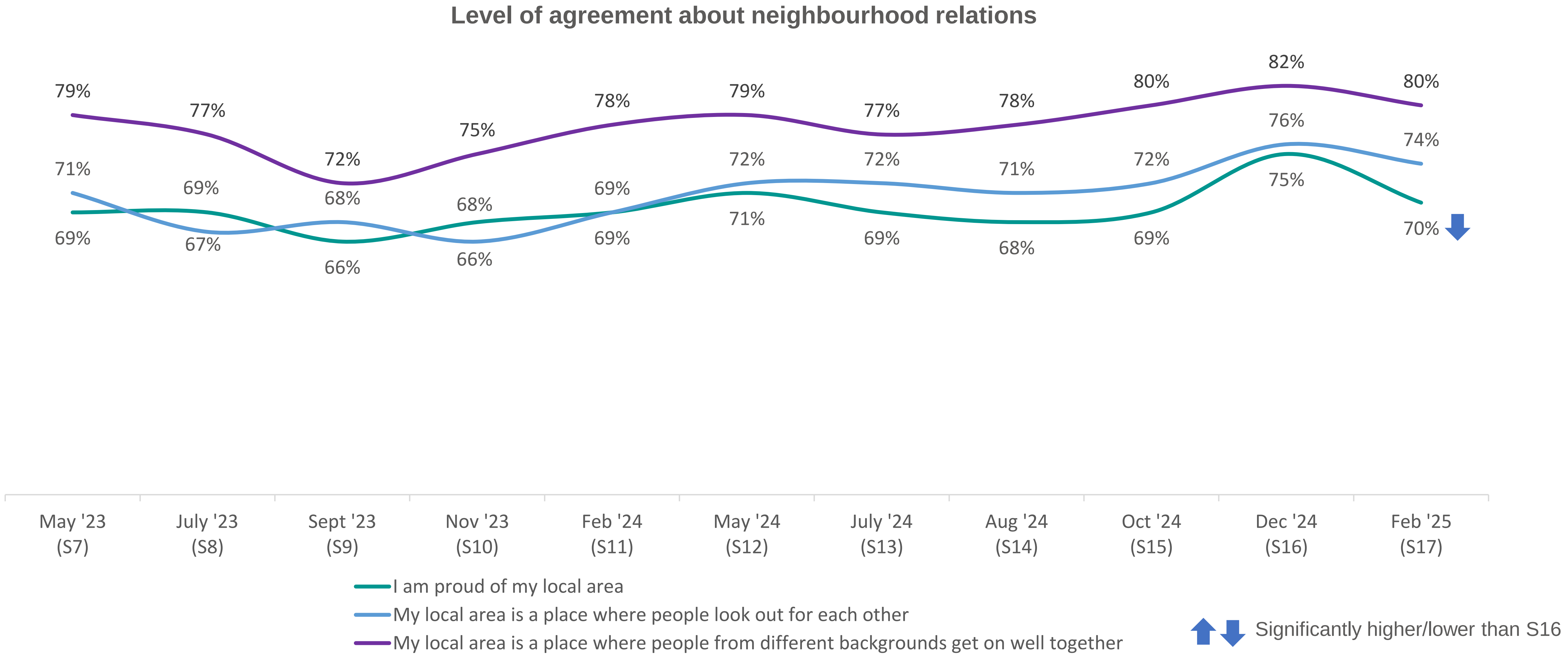
- Those with a disability (29%), including those with mental ill health (35%), *a learning disability (31%),* a sensory disability (30%) or mobility disability (29%)
- *Those with a mixed ethnicity (31%)*
- Those who are not heterosexual (28%)

Individual and/or family circumstance:

- Those dissatisfied with their local area (83%)
- Those who do not agree that people from different backgrounds get on well together (48%) and *those who do not agree that their area celebrates diversity and promotes equality (40%)*
- Those with very low levels of hopefulness (45%)
- Those with low life satisfaction (40%) and those not likely to agree that things they do in their life are worthwhile (40%)
- *Those who have been out of work for more than 6 months (30%),* or not in work due to ill health or disability (33%)
- *Those with a household income of £10,399 per year (31%)*

LA3. To what extent do you agree or disagree with the statement: I would recommend my local area as a good place to live Unweighted base: Greater Manchester Residents Survey, S14, 1482; S15, 1517; S16, 1523; S17, 1515. *Relates to respondents who are fairly dissatisfied and very dissatisfied.

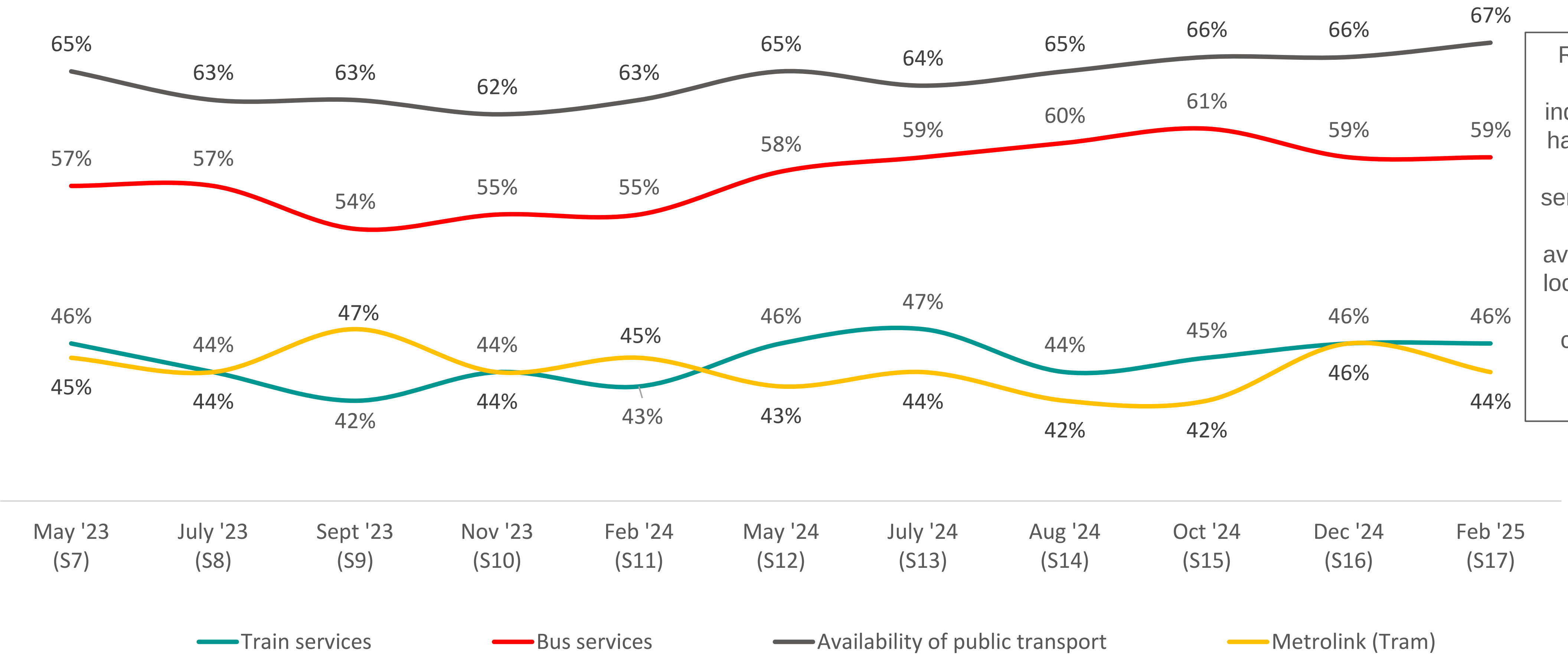
Agreement with statements about neighbourhood relations have decreased somewhat since last wave. 4 in 5 (80% cf. 82%) agree people from different backgrounds get on well together in their local area, with 3 in 4 agreeing that people look out for each other (74% cf. 76%). The proportion saying they are proud of their local area has significantly decreased to 70% from 75% in December 2024



LA6. To what extent do you agree or disagree with the following statements about your local area?) Only valid responses shown
Unweighted base: S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517; S16, 1523; S17, 1515 (All respondents).

Transport and travel facilities satisfaction remains stable, with respondents remaining most satisfied with the availability of public transport compared to other metrics. However, there has been a small decrease in satisfaction with Metrolink/tram services - decreasing 2pp from December 2024 to 44%

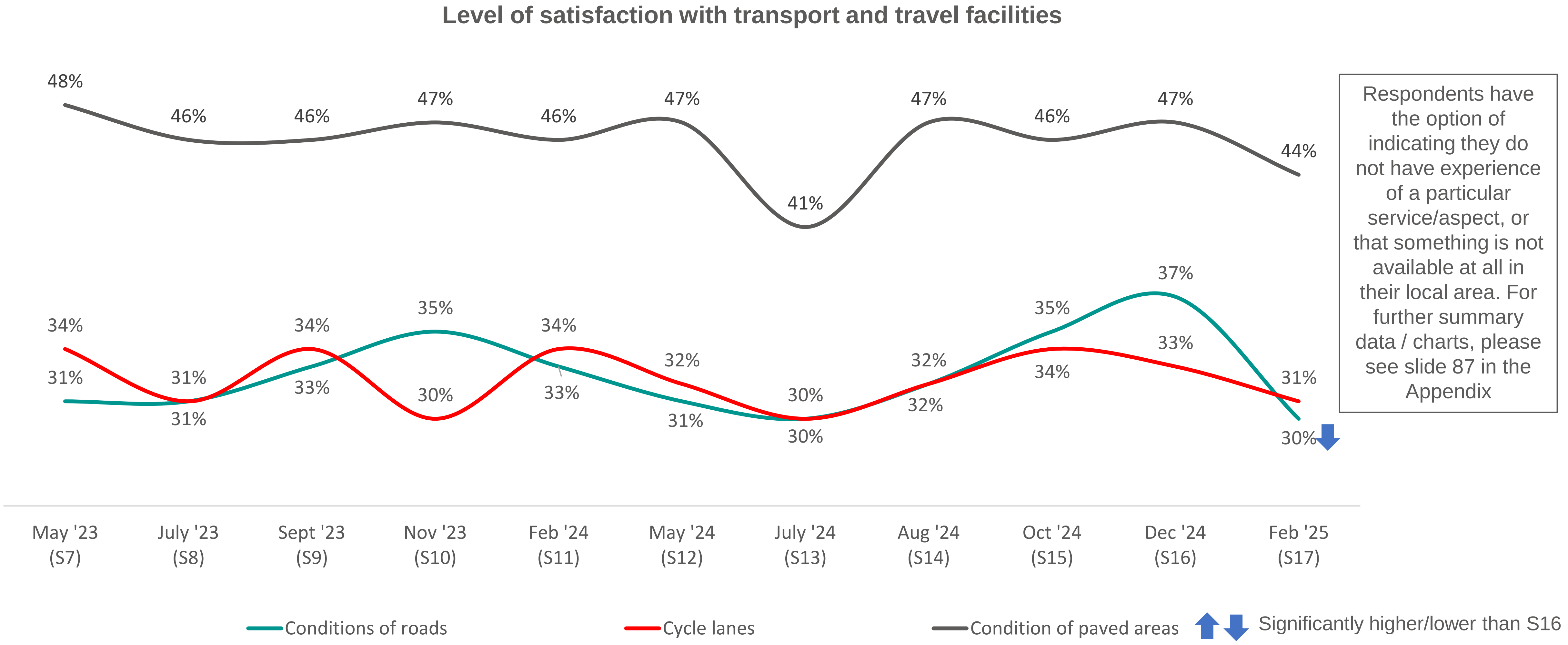
Level of satisfaction with transport and travel facilities



Respondents have the option of indicating they do not have experience of a particular service/aspect, or that something is not available at all in their local area. For further summary data / charts, please see slide 86 in the Appendix

LA7. Thinking about where you live, how satisfied or dissatisfied are you with your experience of the following in your local area?
Unweighted base: S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517; S16: 1523 ; S17: 1515 (All respondents).

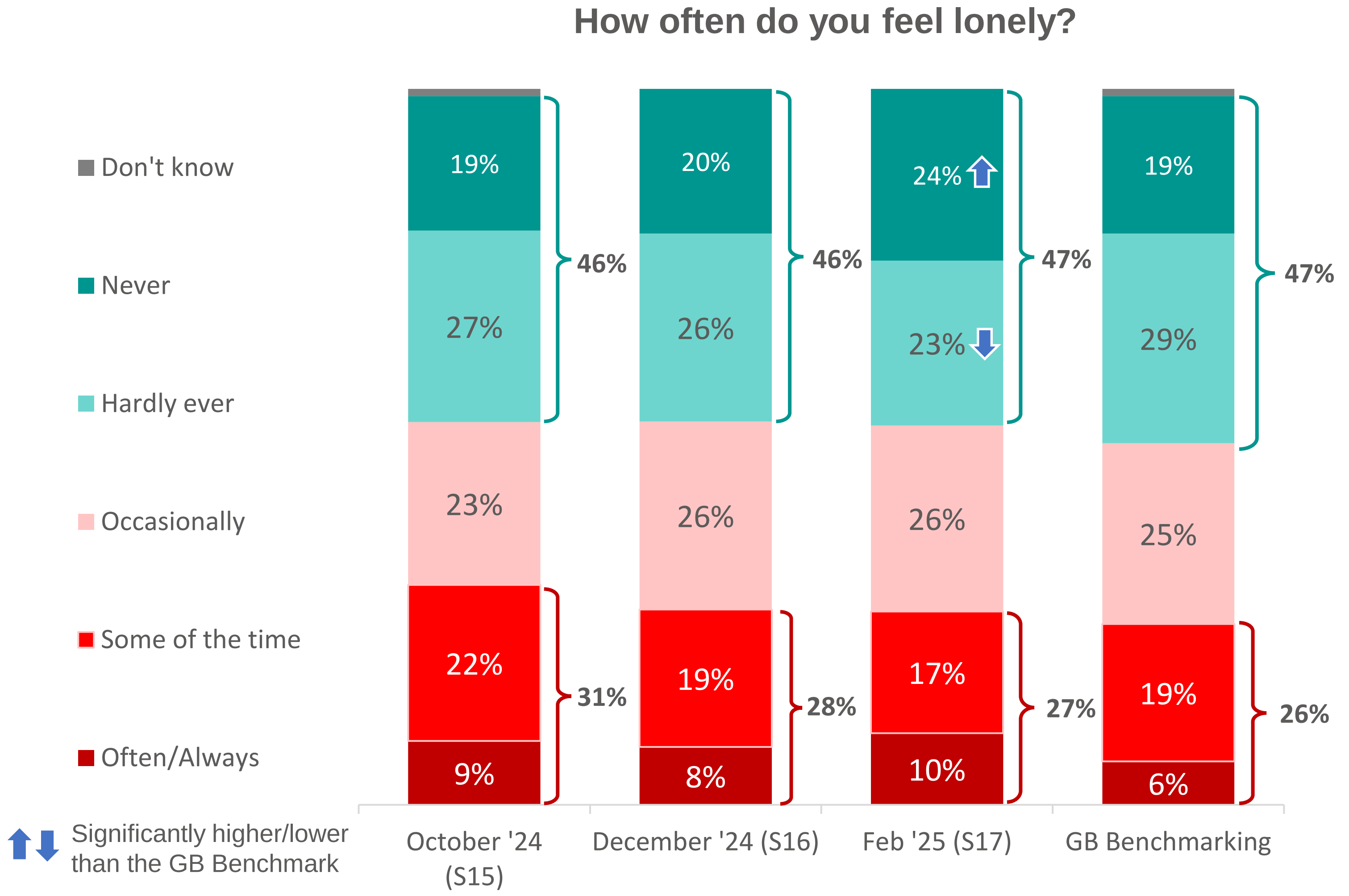
Respondent satisfaction with the conditions of roads peaked in December 2024 and has significantly decreased to 3 in 10 (30%) in February 2025 to the lowest satisfaction since July 2024. Satisfaction with the condition of paved areas and cycle lanes has remained stable over the last three waves.



Respondents have the option of indicating they do not have experience of a particular service/aspect, or that something is not available at all in their local area. For further summary data / charts, please see slide 87 in the Appendix

LA7. Thinking about where you live, how satisfied or dissatisfied are you with your experience of the following in your local area?
Unweighted base: S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517; S16, 1523; S17, 1515. (All respondents).

The proportion of respondents who feel lonely at least some of the time has decreased significantly compared to October 2024 (was 31%, now 27%). Encouragingly as well, there has been a corresponding increase in those that say they never feel lonely (was 20%, now 24%) – and this is significantly higher than the GB average.



% who feel lonely at least some of the time compared to surveys 15-17 (Oct'24-Feb'25) GM average (28%):

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

Demographics:

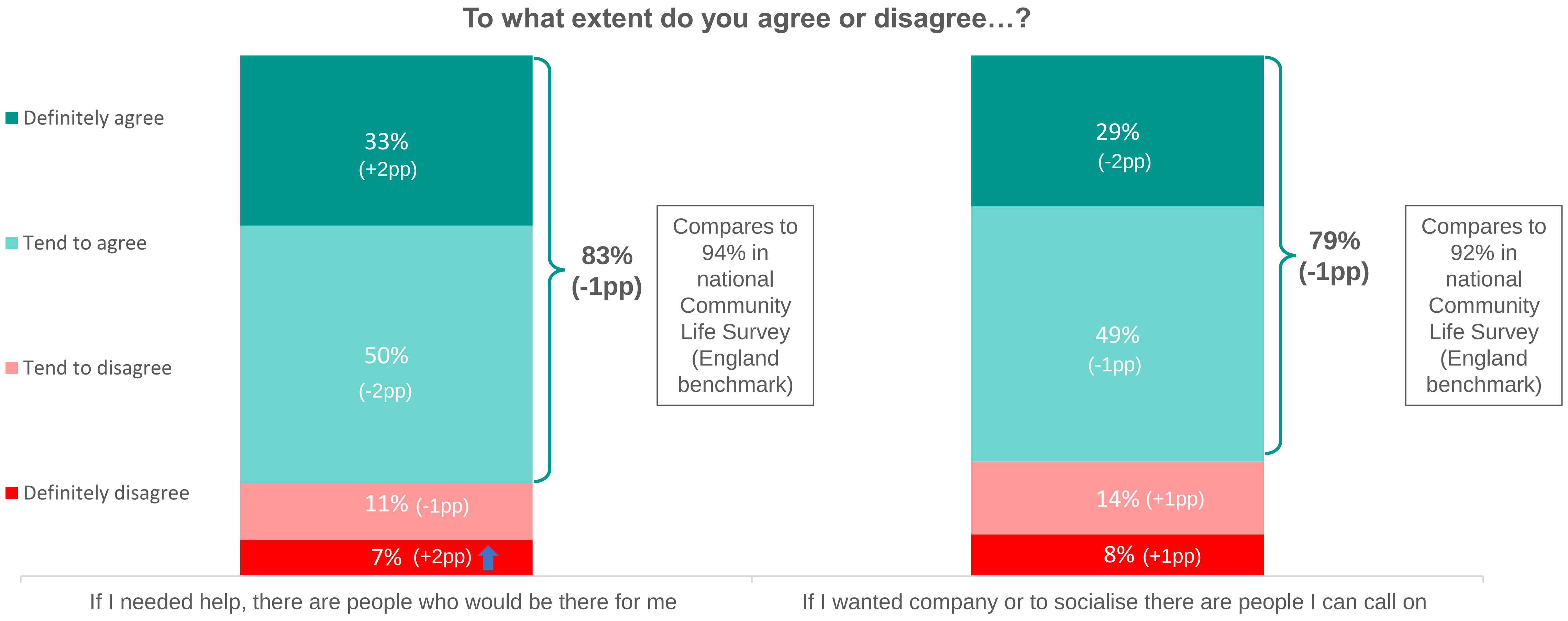
- Those with a disability (41%), including those with mental ill health (59%), a learning disability (51%), a sensory disability (45%)
- Those aged 18-24 (47%)
- *Those who are bisexual (51%)*

Individual and/or family circumstance:

- *Those who have a physical/mental condition which reduces their ability to do activities a lot (53%)*
- Those not in work due to ill health or disability (51%), or those studying at university (48%)
- Those who are living with a friend or family (45%)
- *Those on a zero hours contract (45%)*
- Those who are dissatisfied with their job (45%)
- *Those with a household income of up to £10.4k p/a (43%)*

A5. How often do you feel lonely? Base: Oct'24 (S15) 1517, Dec'24 (S16) 1523, Feb'25 (S17) 1515. GB benchmarking taken from UK measures of wellbeing (fieldwork period 8 January to 2 February 2025).

Agreement with statements regarding socialising and support networks have all remained in line with the last wave, Despite this, those that “definitely disagree” in regards to people being available to help has significantly increased since Dec 2024 (7%, up 2pp). It should also be noted that GM results compare poorly against national benchmarks on these specific questions

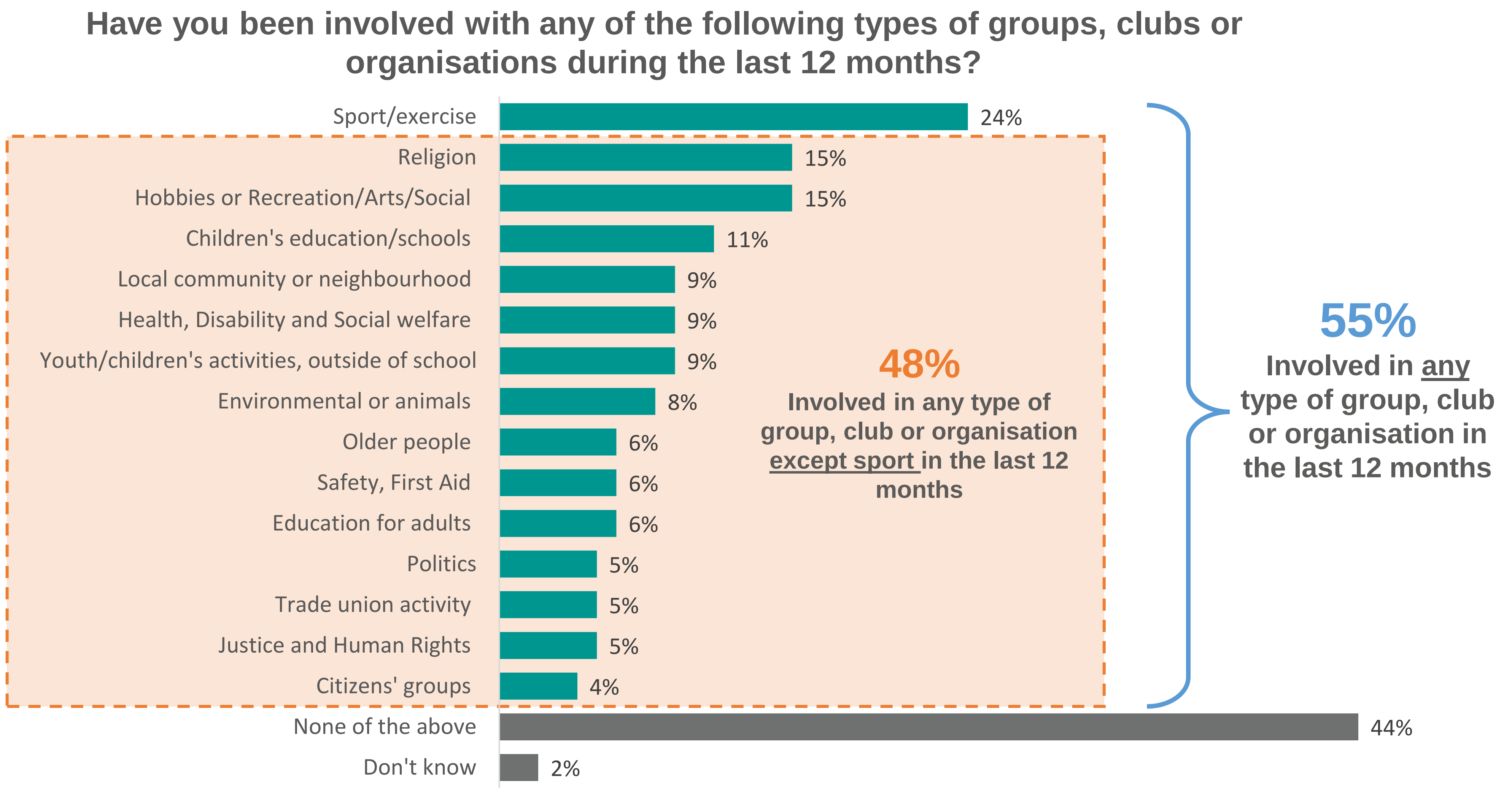


Figures in brackets show change since December 2024 (S16)

Significantly higher/lower than Dec 2024

LA6. To what extent do you agree or disagree with the following statements about your local area? Unweighted base: Survey 15: 1517; Survey 16: 1523, Survey 17: 1515 (All responses) Only valid responses shown. England benchmarking taken from DCMS Community Life Survey (fieldwork October 2023-March 2024). Please note the DCMS’ Community Life Survey is a household online and paper self-completion study. Differences in methodology between the two surveys mean that there may be some modal impacts on answers provided by respondents.

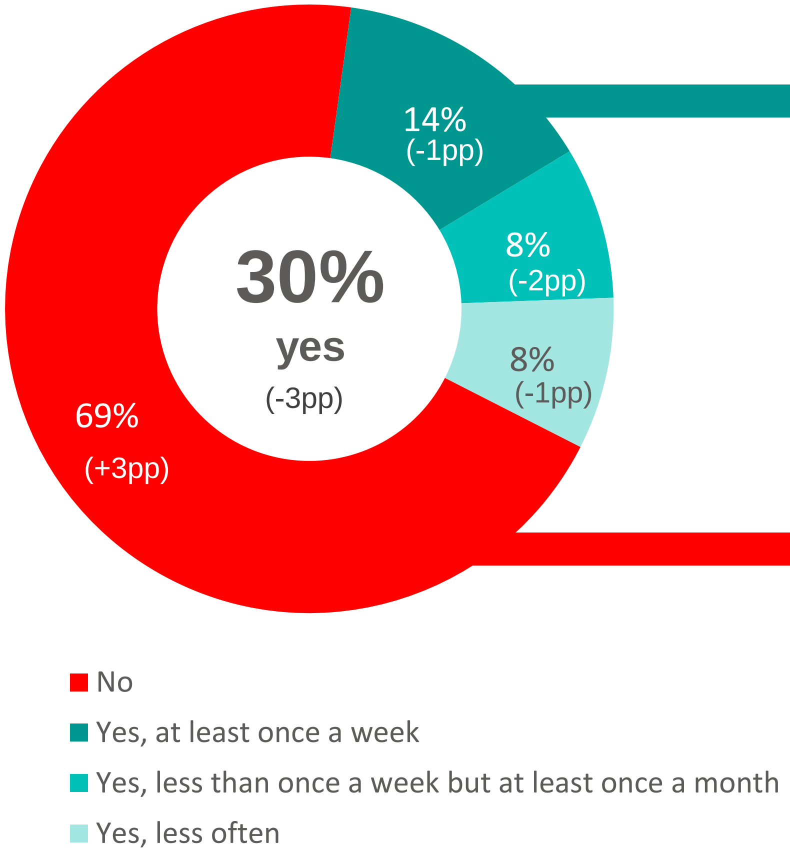
Over half of respondents (55%) report having been involved with a group, club or organisation in the past twelve months. Most commonly, this relates to involvement in sport, with a quarter (24%) of respondents being involved in the past 12 months



LW1. Have you been involved with any of the following types of groups, clubs or organisations during the last 12 months? Base: 4555 Oct’24 (S15) + Dec’24 (S16) + Feb’25 (S17)

3 in 10 have volunteered in the past year, slightly less than December 2024 (30% cf. 33%). Those that are more likely to have volunteered include those with a higher household income, business owners, and certain minority ethnic subgroups

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



The following groups are more likely to volunteer, compared to the Greater Manchester average (32%)*:
62% Those with previous caring responsibilities
***59%** African respondents*
56% Those with a learning disability
***53%** Jewish respondents*
***53%** Those with a household income over £78k*
***51%** Business owners with own employees*
***51%** Those with children in early years education*
***49%** Those studying at university*

The following groups are less likely to volunteer, compared to the Greater Manchester average (where 68% have not volunteered)*:
***85%** Those not in work due to ill health or disability*
84% Homemakers (84%)
80% Those aged between 55-64
***80%** Those dissatisfied with their local area*
***75%** Retired respondents*
74% Those with a mobility disability

*subgroup analysis using data from S15-17 (Oct'24-Feb'25)
Italics denotes newly featuring in latest analysis compared to previous wave

Figures in brackets show change since December (S16)

S12. Thinking of the last 12 months, have you taken part in any volunteering for any clubs, groups or organisations? Base: Feb'25 (S17), 1515

Cost of living

Cost of living – context and approach

Cost of living has been a central theme in the Greater Manchester Residents' Surveys for two and a half years (since September 2022). As questions on cost of living have been asked across multiple surveys, we have tracked data over time. We have also merged data where possible, to create a larger and more robust sample for greater analysis of sub-groups. Many questions within this section use a merged sample from the results from surveys 15, 16 and 17.

Data in the cost-of-living section of this report has been compared against the latest survey results from the ONS’ Opinions and Lifestyle Survey in Great Britain, where comparable information exists. Fieldwork for this survey in Great Britain is published monthly and so comparisons of the GM survey (fieldwork 17th – 28th February 2025) have been compared to the most closely matched ONS fieldwork period, between 5th February – 2nd March 2025. ONS uses a mixed methodology, both online and telephone interviews.

Please note that some Greater Manchester questions in this section have had their wording or answer options adjusted to reflect changes to the ONS’ Opinions and Lifestyle Survey, and so direct comparisons with older Greater Manchester survey 3 and 4 findings may therefore not always be possible.

Latest ONS Opinions and Lifestyle Survey results (“February” 2025), published 21 March 2025
https://www.ons.gov.uk/peoplepopulationandcommunity/wellbeing/bulletins/publicopinionsandsocialtrendsgreatbritain/february2025

Cost of living – key findings

COSTS OF LIVING – LONG-TERM TRENDS

- This edition of the findings report places a focus on long-term trends, timed with the end of the 2023/24 financial year. These tracking measures will be revisited in 2025/26, but also with some different questions to gain fresh perspectives in relation to levels of material disadvantage in everyday life.
- Long-term tracking of cost-of-living measures shows Great Manchester residents' ability to save money, afford a necessary expense, and afford their energy bills have broadly remained stable, often with no consistent trend across the last 12 – 18 months.
- A note of caution, however, that while the picture now remains stable for the majority, vulnerable respondents are much more susceptible to financial pressures, with those from within racially minoritised communities and disabled respondents consistently more likely to report experiencing financial strains.
- Across the entire tracking period, GB benchmarks have consistently outperformed the GM figures – for example in relation to affording energy costs and unexpected but necessary costs. Differences remain statistically significant.

SAVINGS

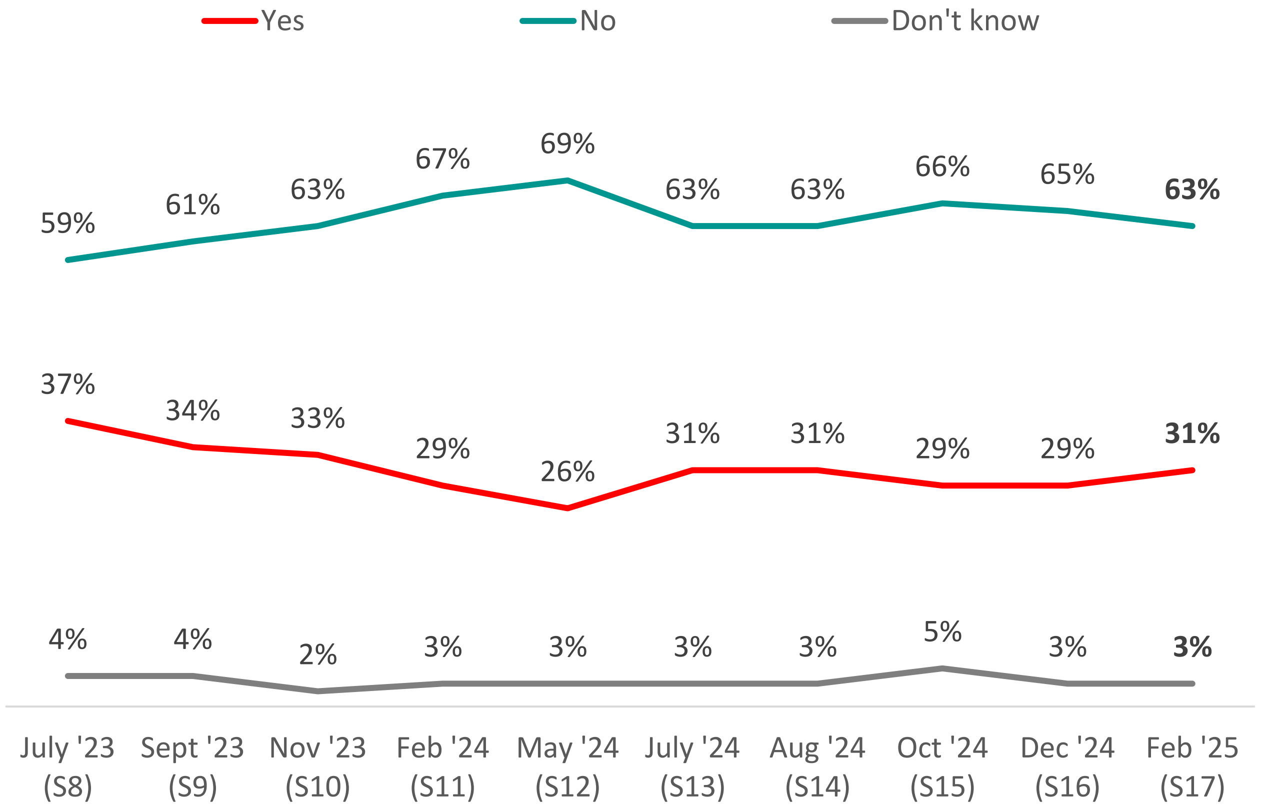
- While there have been some significant changes throughout the winter months of 2024, respondents' ability to save is as it was a year ago (46% now and then) and there is stability in borrowing more credit in the past month (31% cf. 29% in Feb 2024) and affording an unexpected but necessary expense of £850 (51% cf. 52% in Feb 2024). However, the latter is still lower than the GB average.

AFFORDING BILLS

- And similarly, while GM respondents are finding it significantly more difficult than GB respondents to afford their energy costs – this difficulty has remained at a stable level of 2 in 5 (45%)
- With regards to renters and their ability to afford rent payments, the gap has narrowed between those who can and cannot over the last couple of surveys, bringing the results closer to what was noted in Feb 2024. Over half (51%) of renters say they find it difficult to afford their rent, vs 43% who find it easy. In February 2024, this was 49% easy, 47% difficulty
- Though mortgage payers are still more likely than renters to be able to afford payments, 37% now say they are finding this difficult. The former figure has been steadily increasing over the last few surveys (though this most recent figure is lower than the 43% reporting difficulties in December 2024).

3 in 10 (31%) GM respondents are more likely to have **borrowed more money or used more credit** in the past month, similar to the 29% recorded a year ago in February 2024.

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



Significantly higher/lower than Sept 2023

Between Oct 2024 and Feb 2025 (S15 - 17), those who have borrowed more money or used more credit than usual in the last month, compared to the GM average (30%), are higher among:

Demographics:

- Those from a mixed background (48%)
- Those with a disability (41%) including those with learning difficulties (56%) and those with mental ill health (47%)
- Gay women (54%)
- Females under 40, with children under 5 (44%)

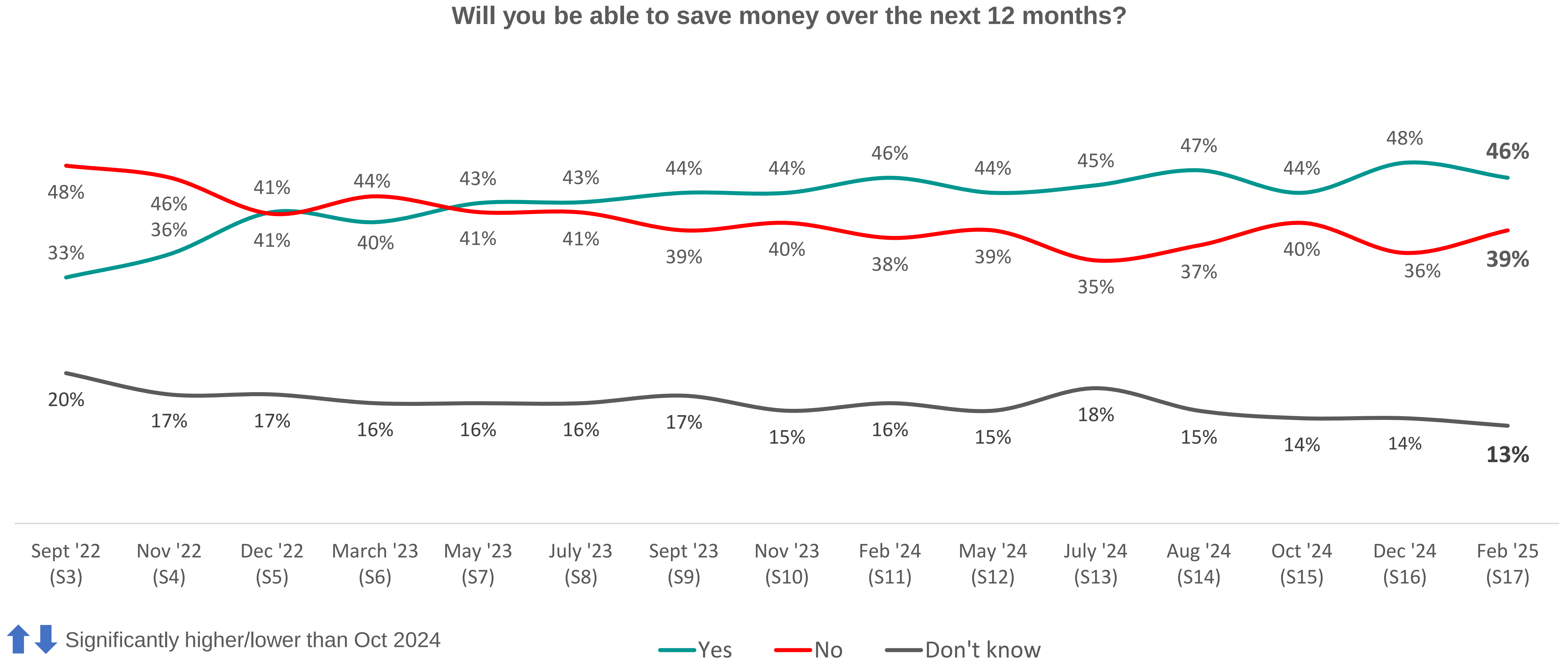
Individual and/or family circumstance:

- *Those who have been discriminated by their access to, or experience of, the police or the criminal justice system (61%); or education or training (57%), or housing or benefits (56%)*
- *Those who have been discriminated against because of their age (57%)*
- *Those who have been shown discrimination because of their physical or mental health condition (55%), or sexual orientation (54%), or ethnic background (49%)*
- *Those who have been out of work for six months or less (50%)*
- Those who have very low levels of hopefulness (50%), low levels of happiness (46%)
- Those who often or always have high levels of stress at work (47%)
- Those who find it difficult to take an hour or two off during work hours (44%)

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

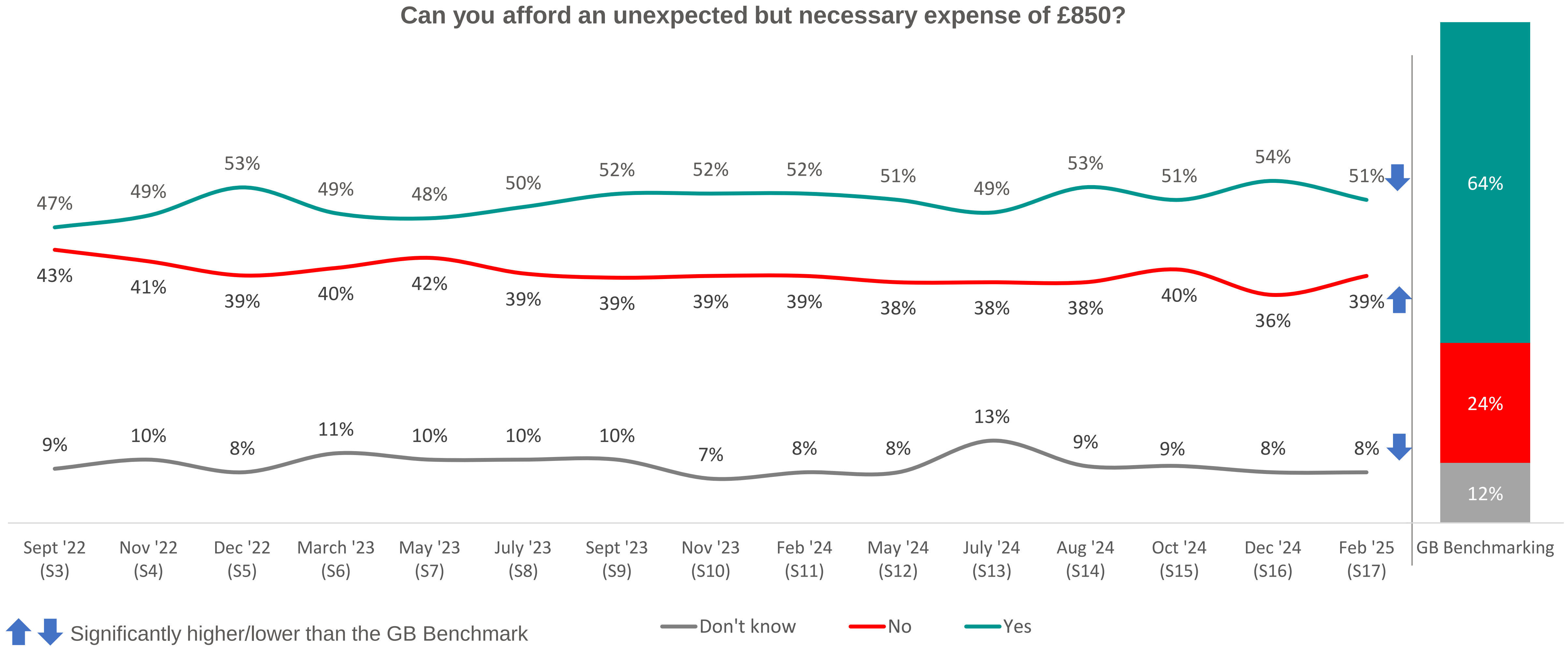
CL3. Have you had to borrow more money or use more credit than usual in the last month, compared to a year ago? Unweighted base: S8, 1612; S9, 1560; S10, 1546, S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517; S16, 1523; S17; 1515 (All respondents). Subgroup analysis completed on groups with a base size of over 50.

Almost half (46%) of respondents think they will **be able to save money over the next year considering the economic situation, while approaching two in five (39%) do not.** Both are in line with previous surveys back to Sept 2023, around 18 months ago



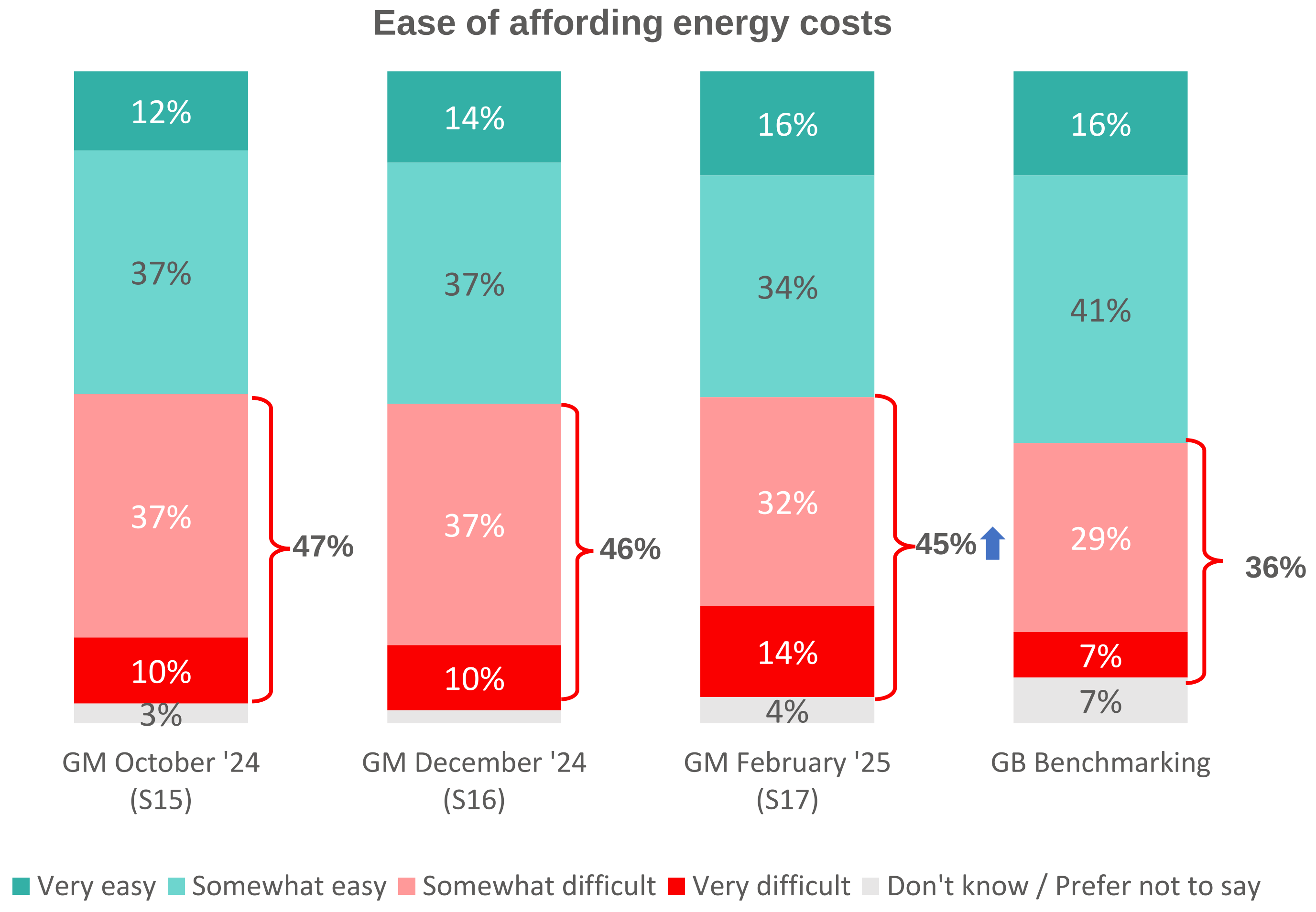
CL1. In view of the general economic situation, do you think you will be able to save any money in the next 12 months?
Unweighted base: S3, 1677; S4, 1636; S5, 1470; S6, 1767; S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517; S16, 1523 (All respondents).

And falling also in line with results 18 months ago, 51% of GM respondents said they could afford to pay an unexpected but necessary expense of £850 - though this continues to be significantly lower than the GB figure of 64%



CL2. Could your household afford to pay an unexpected, but necessary, expense of £850? Unweighted base: S3, 1677; S4, 1636 S5, 1470; S6, 1767; S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540, S14, 1482; S15, 1517; S16, 1523; S17, 1515 (All respondents). ONS data, based on national fieldwork 5 February to 2 March 2025

This stability also translates to affording energy costs – with 45% of GM respondents continuing to find it difficult to afford their energy costs (GB average 36% - increasing from 32%). Those from within racially minoritised groups (52%) and renters are consistently more likely to find it difficult to afford these costs.



% who are significantly more likely to find it very/somewhat difficult to afford their energy costs compared to GM average (46%)*

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

Demographics:

- Those from racially minoritised groups (52%), including Indian (67%) and Asian or Asian British respondents (55%)
- Those whose first language was not English (55%)
- Those with a disability (62%) including those with a mobility disability (62%), a sensory disability (59%) or mental ill health (73%)
- Those with children aged 19-25-years-old (61%)

Individual and/or family circumstance:

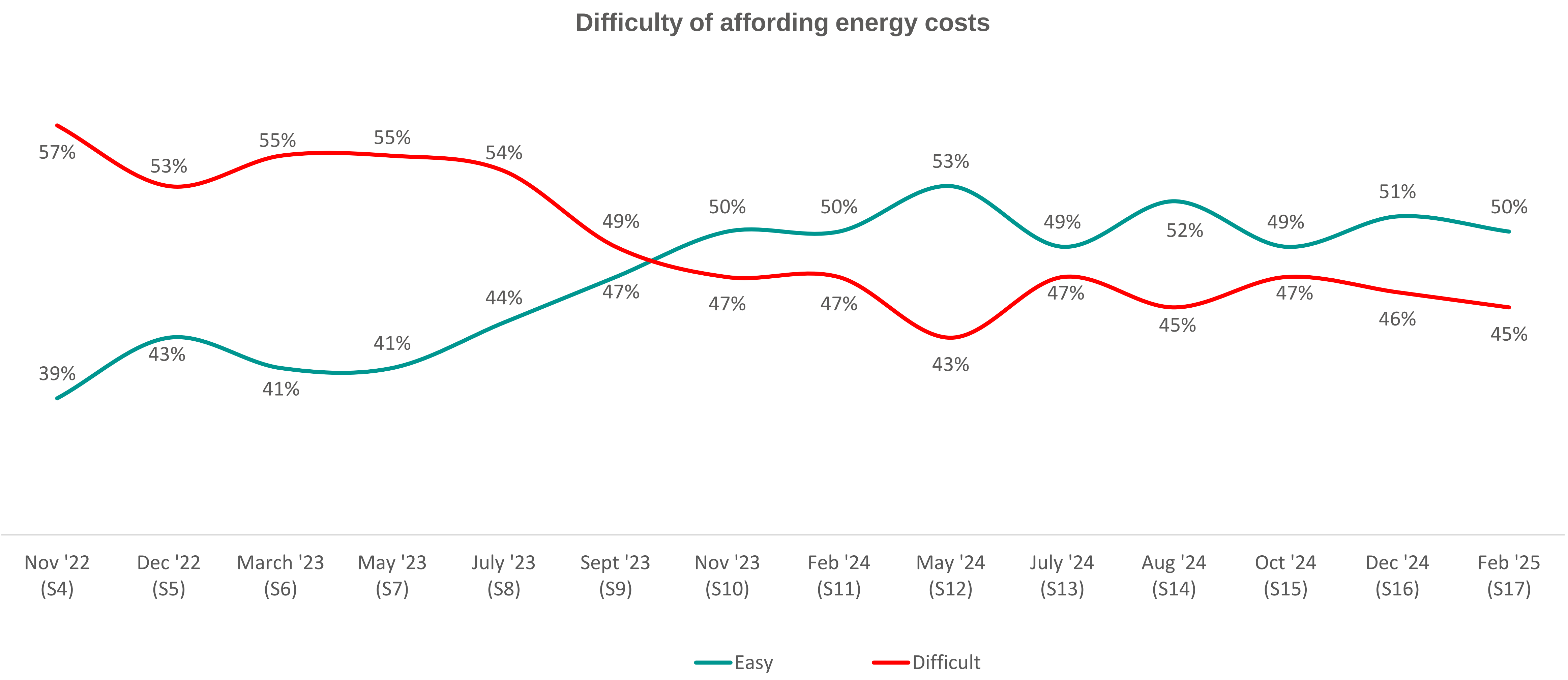
- Those with very low levels of hopefulness (77%), low life satisfaction (73%), or low happiness (70%)
- Those not in work due to ill health or disability (76%)
- Those dissatisfied with their local area (70%)
- Those renting their homes (61%) including from a Local Authority/ Council (66%), Housing Association / Trust (65%), or privately (56%)
- *Those who have been discriminated against in their access to, or experience of education or training (57%)*

*subgroup analysis uses S15-17 data.

⬆⬇ Significantly higher/lower than the GB Benchmark

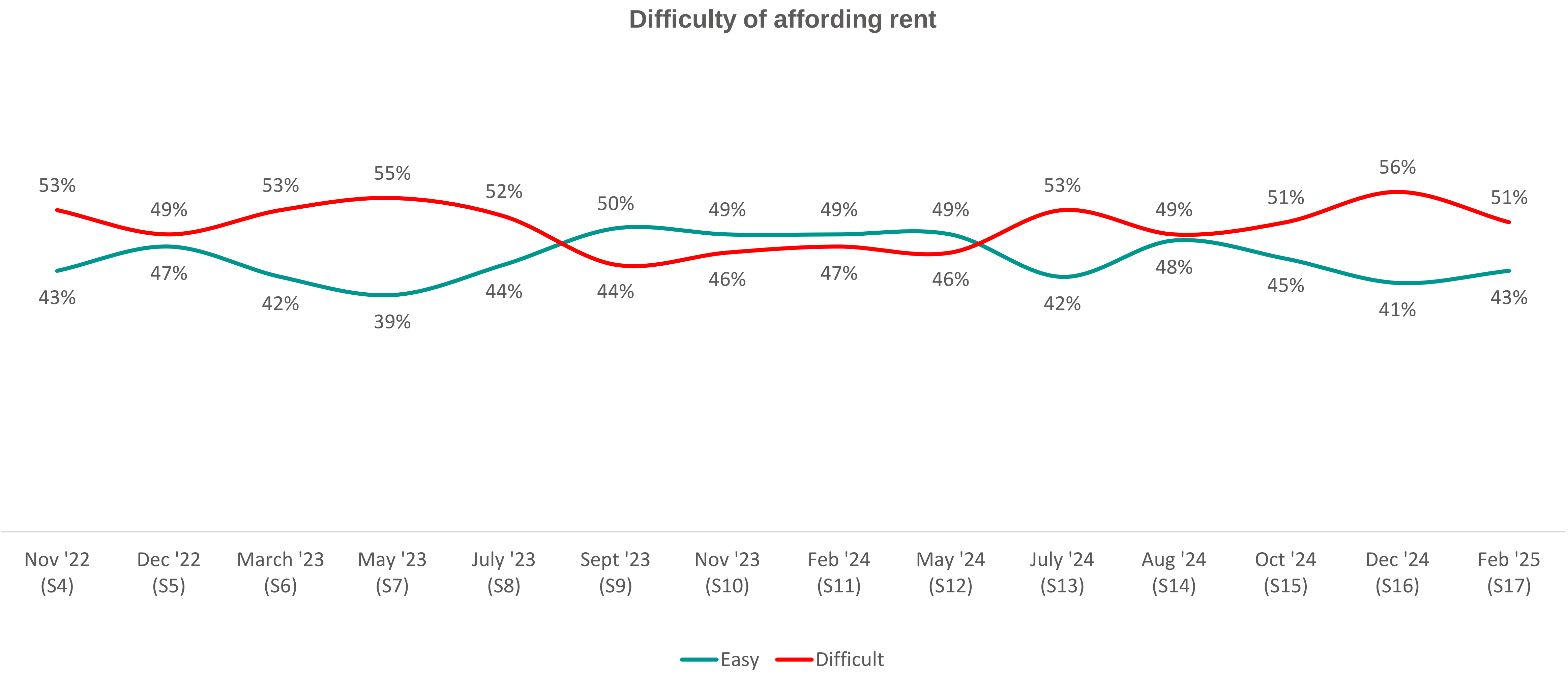
CL9. How easy or difficult is it to afford the following? Unweighted base: S13, 1471; S14, 1423; S15, 1444; S16, 1468; S17, 1453 (All respondents who pay their energy costs). ONS data, based on national fieldwork 5 February to 2 March 2025

The gap between those that find it easy or difficult to afford their energy costs continues to fluctuate wave-on-wave. The proportion experiencing difficulties has been in the range 43-47% for over 12 months



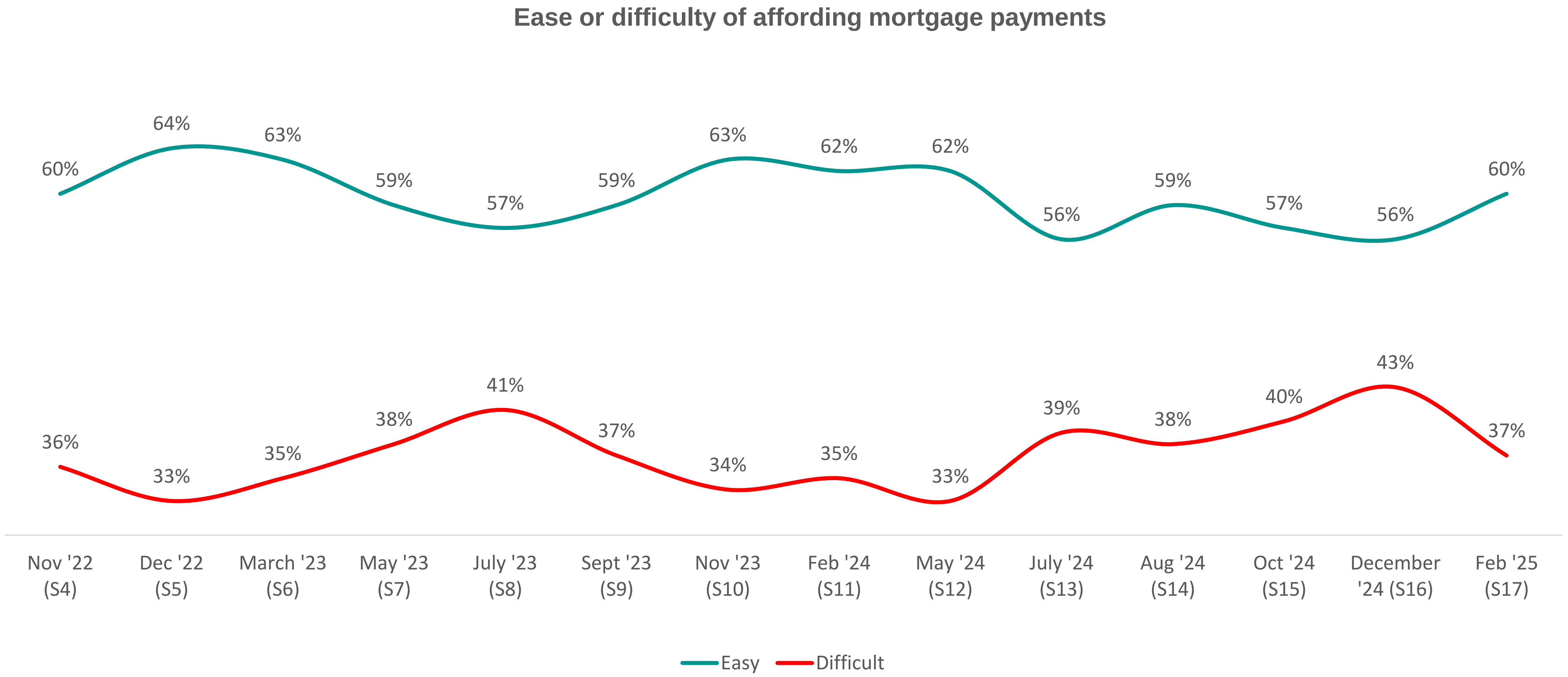
CL9. How easy or difficult is it to afford your...
Unweighted base: S4, 1569; S5, 1424; S6, 1708; S7, 1426; S8, 1561; S9, 1497; S10, 1488; S11, 1403; S12, 1497; S13, 1471; S14, 1423; S15, 1444; S16, 1468; S17, 1453 (All who pay energy costs)

The gap between renters who find it difficult and easy to afford rent has also fluctuated. 51% of renters are currently finding it difficult to afford their rent



CL9. How easy or difficult is it to afford your...
Unweighted base: S4, 438; S5, 368; S6, 405; S7, 388; S8, 436; S9, 377; S10, 412; S11, 369; S12, 488; S13, 497; S14, 411; S15, 470, S16, 362; S17, 488 (All renters).

Approaching 2 in 5 (37%) of homeowners say they find affording their mortgage payments difficult – a lower figure in the most recent wave, following increases over the second half of 2024



CL9. How easy or difficult is it to afford your...
Unweighted base: S4, 459; S5, 412; S6, 469; S7, 395; S8, 456; S9, 411; S10, 392; S11, 350; S12, 409; S13, 383; S14, 407; S15, 370; S16, 308; S17, 363 (All who do not own their home outright).

Those more likely to find it difficult to afford mortgage or rent payments include those from racially minoritised groups and those dissatisfied with their working situation

% who are significantly more likely to find it difficult to afford mortgage payments compared to the GM average (40%):*	% who are significantly more likely to find it difficult to afford rent compared to the GM average (52%):
Demographics: • Those in racially minoritised groups (55%), including Asian or Asian British respondents (59%) • Those with a disability (51%), including those with mental ill health (57%) • Those aged 16-24 (53%) • *Those with children aged 16-24 (50%)* **Individual and/or family circumstance:** • Those with low levels of life satisfaction (64%), low happiness (59%) or low hopefulness (53%) • Those dissatisfied with their work hours (62%), dissatisfied with their job (56%) or dissatisfied with their pay (57%) • *Those who have been discriminated against in the access to, or experience of education or training (64%), or police or criminal justice system (62%)* • *Those who feel they are treated unfairly by society (60%)* • *Those who would not recommend their local area (49%)* • *Those in part time employment (48%)* • *Those who disagree there are cultural opportunities in their local area (47%)*	**Demographics:** • Parents with 19-25-year-olds in the house (69%) • Those from racially minoritised groups (59%), including Asian or Asian British (63%) or Black or Black British (61%) • *Those with mental ill health (60%)* • Those who English is not their first language (59%) **Individual and/or family circumstance:** • Those with very low levels of hopefulness (70%) • Those with low levels of life satisfaction (70%) or low happiness (68%) • *Those who disagree that their job makes good use of their skills and abilities (66%)* • Those dissatisfied with their work hours (65%), dissatisfied with their job (62%) or dissatisfied with their pay (64%) • *Those who have been discriminated against in the access to, or experience of education or training (63%), or housing or benefits (62%), employment or work (60%), and as a consumer (60%)* • Those who feel they are treated unfairly by society (62%) • Those not in work due to ill health or disability (60%)

*Subgroup analysis uses merged data from S15-17 combined. *Italics denotes greater prominence / newly featuring in latest analysis compared to previous wave*

CL9. How easy or difficult is it to afford your...
Unweighted base: Greater Manchester Residents Surveys 15-17, 1041 (All with a mortgage); 1320 (All renters)

Early Education workforce campaign

Early Education Workforce Campaign – Key findings

In October 2024, an advertising campaign was launched to highlight the value of the Early Years workforce and the importance of quality Early Education and Childcare to help children to thrive. Some ads were placed on social media as well as in public places. This campaign was extended in January 2025 to the TFGM network. The February 2025 residents' survey asked respondents a series questions related to this campaign.

Awareness of the campaign:

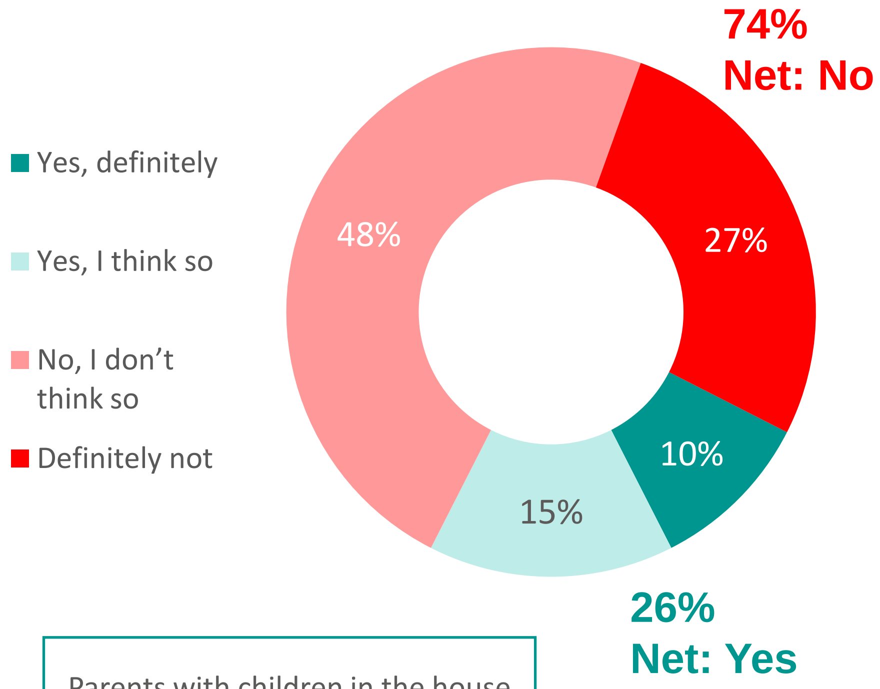
- A quarter of respondents (26%) say they have seen advertisements related to the campaign around Greater Manchester. Parents with children in the household were more likely to have seen the campaign adverts (34%)
- One third (33%) of those who have seen campaign advertisements have seen them on social media, making it the most common source. The next most common place to have seen it is on a bus or a tram (28%) or at a bus or a tram stop (28%).

Effectiveness of the campaign:

- Two fifths (39%) agreed the message that 'quality early education and childcare is important' is clear in the advertising, the most among all the statements. However, just over one fifth (22%) said that the campaign feels relevant to their community - the lowest levels of agreement among all statements.
- When looking at key sub-groups:
  - those with children in early years education (or those aged 0-4 who attend nursery/pre-school/childminder) were more likely to agree that the message was clear (47% agreement amongst this sub-group, vs 39% across the survey as a whole)
  - parents with children in the household were more likely to agree that the campaign messages were engaging (27% vs 23% across the survey as a whole) and that the campaign feels relevant to their community (28% vs 22% across the survey as a whole).
- Views on campaign effectiveness were higher among those ~400 respondents who had already seen the campaign adverts ahead of being shown the materials in the survey.

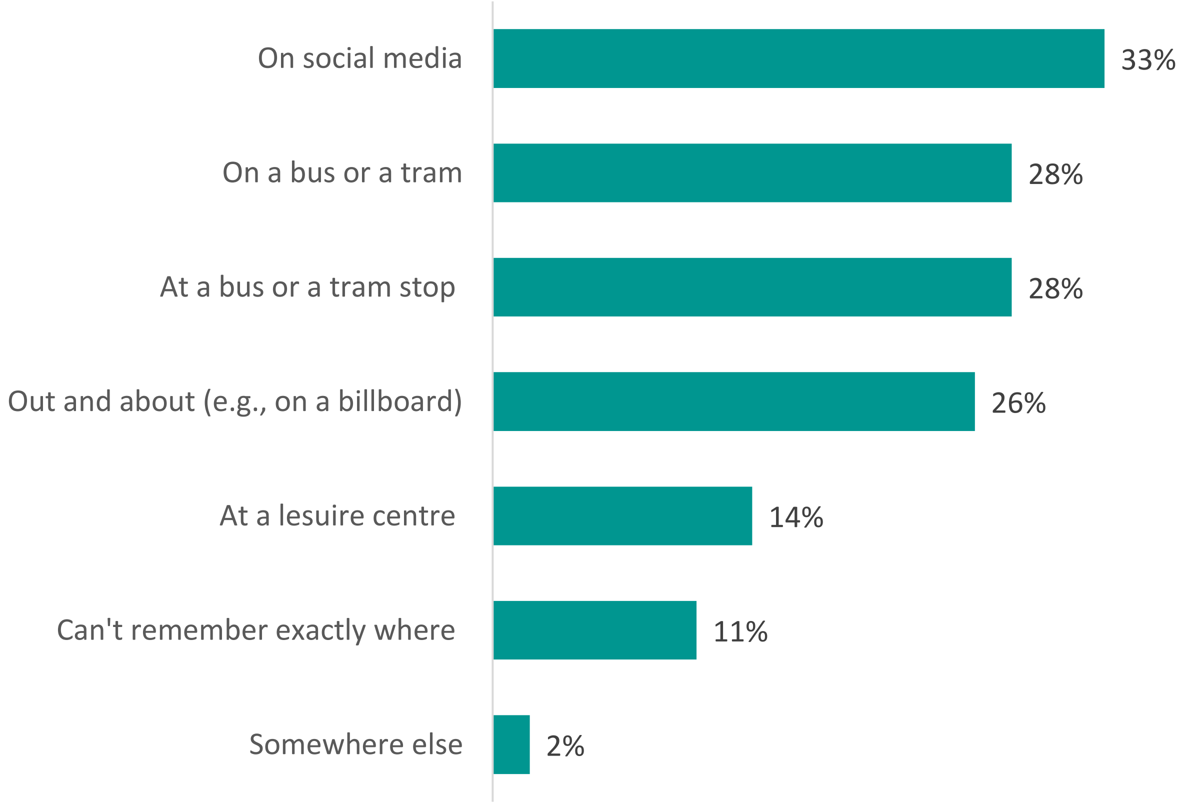
One quarter (26%) say they recall having seen advertisements about the Early Education Workforce Campaign, however, three quarters (74%) have not. Of those who say they have seen the advertisements; a third (33%) saw them on social media, followed by over a quarter on a bus or a tram or at a stop (both 28%)

Have you seen any of these advertisements or messages about the Early Years Campaign before today?



Parents with children in the house are more likely to have seen the Early Years adverts (34%)

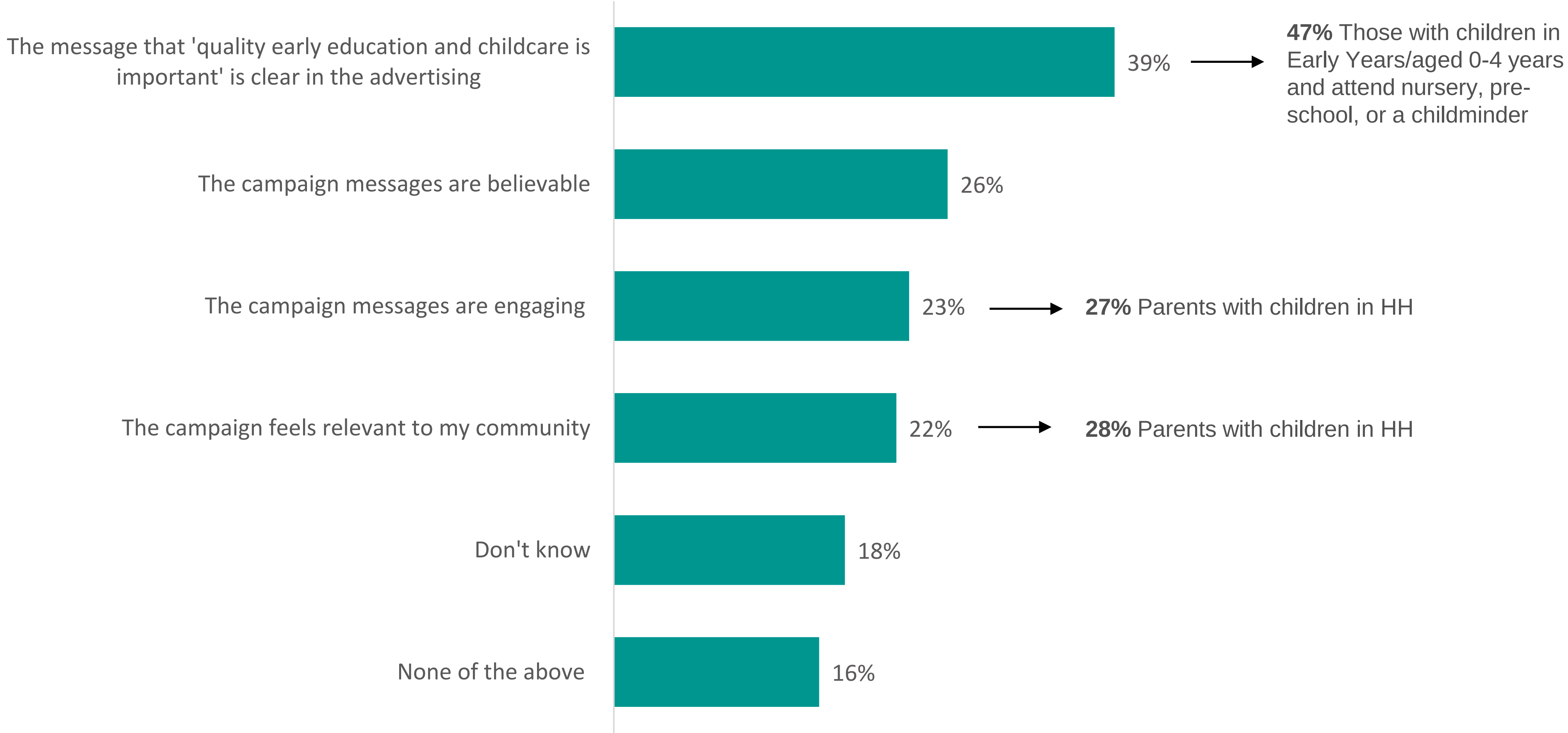
You said you have seen these before. Where have you seen the advertisement or messages about the Early Years Campaign before?



EY1. Have you seen any of these advertisements or messages about the Early Years Campaign before today? Base: 1515 (All respondents)
EY2. You said you have seen these before. Where have you seen the advertisement(s) or message(s) about the Early Years Campaign before? Base: 385 (All who have seen the images)

When testing the impact of the campaign, respondents are most likely to agree that 'quality early education and childcare is important' is clear in the advertising (39%). While around a quarter agree the campaign messages are believable (26%) and engaging (23%).

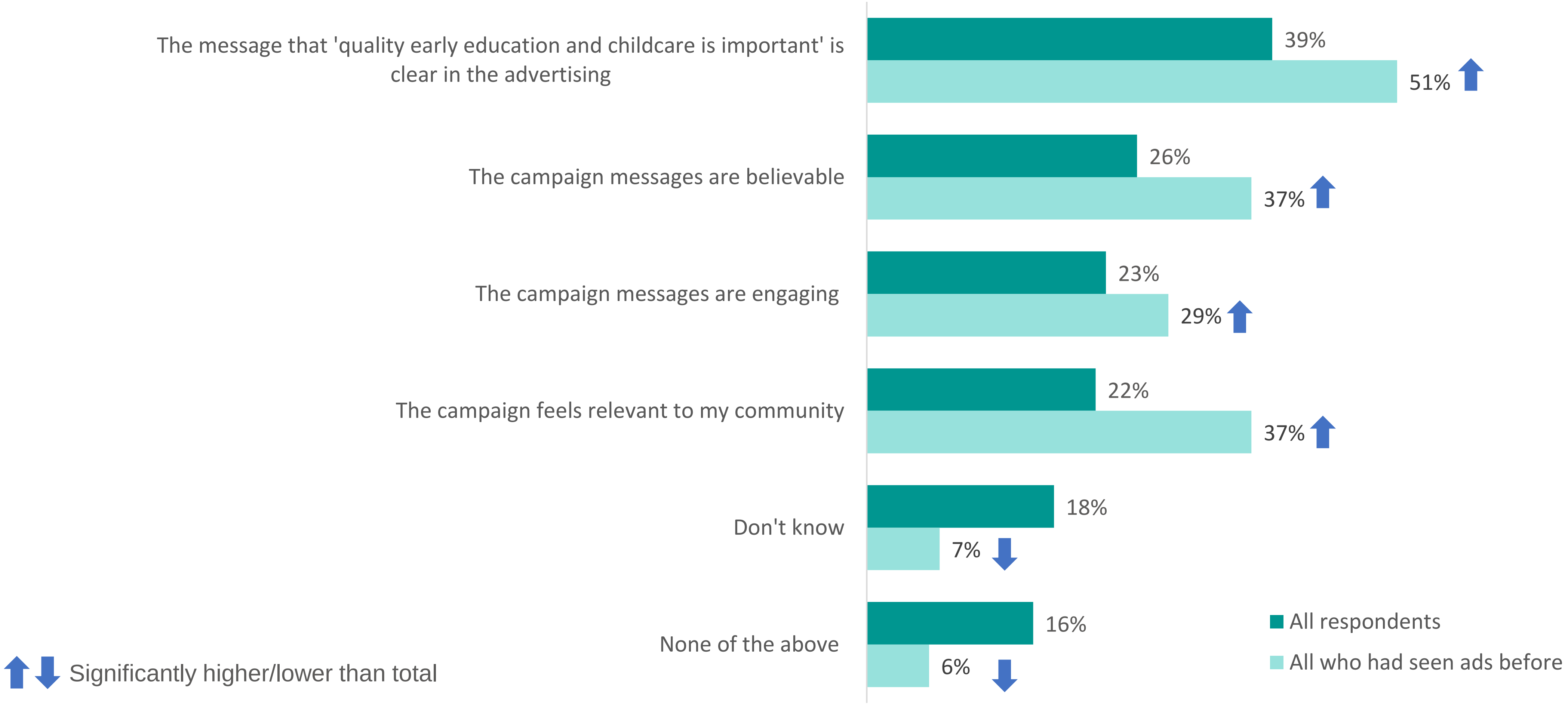
Thinking about the campaigns shown, which of the following do you agree with?



EY3. Thinking about the campaigns shown, which of the following do you agree with? Base: 1515 (All respondents)

Views on campaign effectiveness are higher among those ~400 respondents who had already seen the campaign adverts ahead of being shown the materials in the survey. Here, around half (51%) found the messaging clear, and more (37%) said the campaign feels relevant to their community

Thinking about the campaigns shown, which of the following do you agree with?



EY3. Thinking about the campaigns shown, which of the following do you agree with? Base: 1515 (All respondents); 391 (all who have seen early years ads before today)

Digital inclusion

Findings from the October 2024 to February 2025 survey merged into groups of three waves (trio of face-to-face samples)

Unweighted base: 756 (Face to face respondents S15+16+17)

Digital inclusion – context

Sampling

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

The sampling approach covers all ages and provides a sample of around 250 responses per survey (excludes online respondents*). The reporting approach places a particular focus on over 75-year-olds, under 25-year-olds, and disabled people – as priority groups for many elements of Greater Manchester activity to address digital exclusion.

Merged Findings

For this report, we have merged findings for survey 17 (February 2025) with those from survey 16 (December 2024) and survey 15 (October 2024) to provide a robust sample size for sub-group analysis. All three surveys have used a face-to-face interview approach.

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

** Base sizes: Survey 15: October 2024 (266), Survey 16: December 2024 (250), Survey 17: February 2025 (250)*

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

Digital inclusion – Key findings

EXPERIENCE OF DIGITAL EXCLUSION (survey 15+16+17 combined data, October 2024 – February 2025*)

- Since October 2024, approaching a third (31%) of respondents have said that their household experiences some form of digital exclusion. This is in line with the proportion that was seen in surveys 9-11, from Oct 2023 – Feb 2024 (33%).
- It appears that, although the proportion of respondents experiencing any form of digital exclusion overall has remained stable, there have been increases in digital exclusion reported by those aged 75+ and disabled respondents. Methodological change is, however, likely to be the key driver of this change - those who are recruited to take part in telephone research are often recruited through online methods, lowering the chance of recruiting those who are digitally excluded vs our current approach of face-to-face interviewing on the doorstep.
  - 79% of those aged 75+ now say they have experienced one or more aspect of digital exclusion, compared to 60% in surveys 9-11
  - 57% of disabled respondents report experiencing at least one form of digital exclusion, rising from 45% in surveys 9-11
  - 24% of 16–24-year-olds now say they have experienced one or more aspect of digital exclusion, stable with the 23% reported in surveys 9-11
- The extent / nature of this digital exclusion can be expressed by reviewing whether respondents have issues relating only to one aspect of exclusion or many (from a list** including: consistent/reliable internet connection; suitable devices; affordability; digital skills; access to support). In the most recent wave, 6% of respondents have experienced all 5 aspects of digital exclusion (multiple disadvantage / barriers in this area)

CONFIDENCE USING DIGITAL SERVICES (survey 15+16+17 combined data, October 2024 – February 2025)

- A fifth (20%) of respondents say either they (15%) or someone in their household (11%) is not confident using digital services online – these figures are just slightly higher than the equivalent figures published in the last survey findings report (though not significantly so)
  - Subgroup analysis based on responses combined from S15-17 continue to show confidence is lacking amongst older cohorts aged 75+ (69%) and disabled respondents (36%)

** Base sizes: Survey 15: October 2024 (266), Survey 16: December 2024 (250), Survey 17: February 2025 (250)*

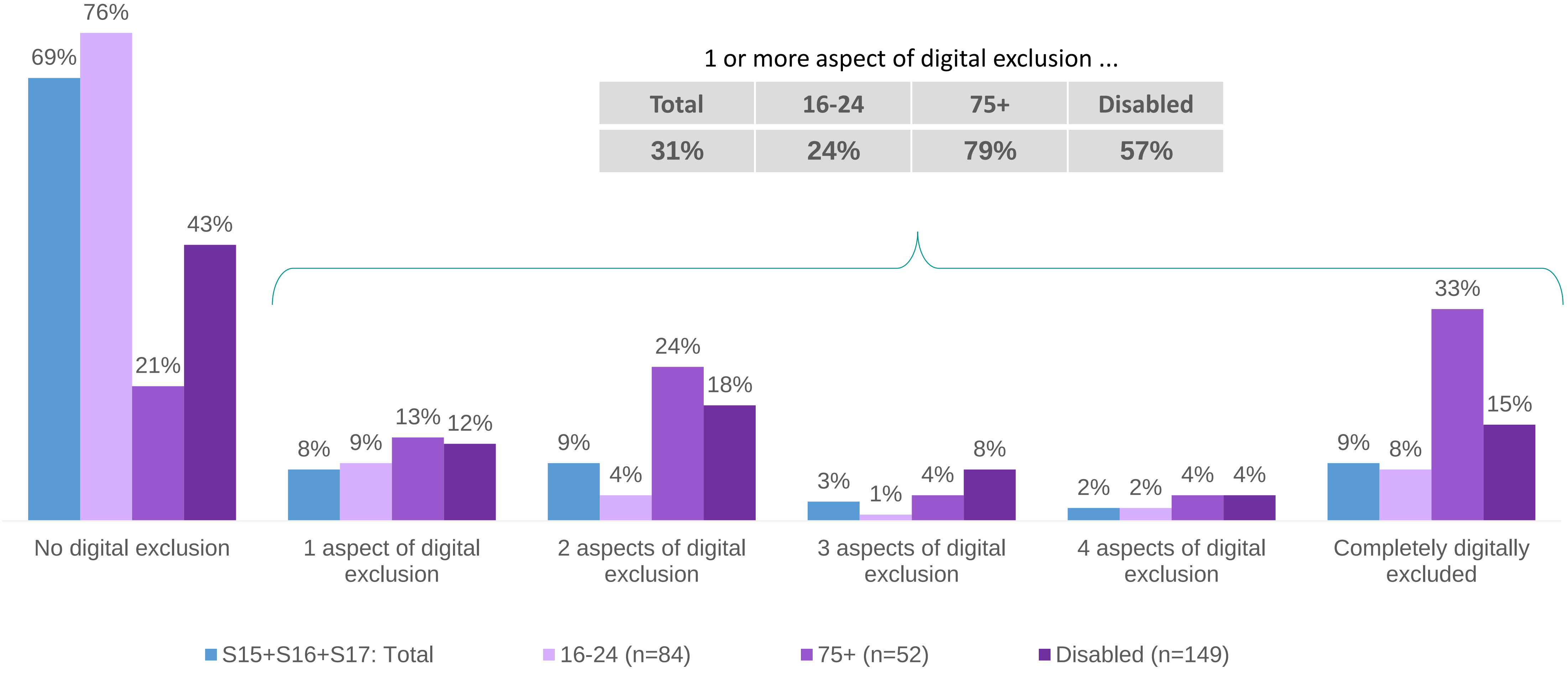
***The five aspects of digital exclusion relate to: (I) consistent and reliable access to an internet connection at home; (II) to devices that allow access to the internet; (III) affording access to the internet; (IV) skills needed to access and use digital services online; (IV) support needed to access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

Around a third (31%) of respondents continue to report experience of **at least one aspect of digital exclusion in their household**, a figure that rises among older (79%) and disabled respondents (57%). Around one in ten report experience of all five aspects of digital exclusion covered in the survey

Number of aspects of digital exclusion experienced (October 2024 – February 2025)

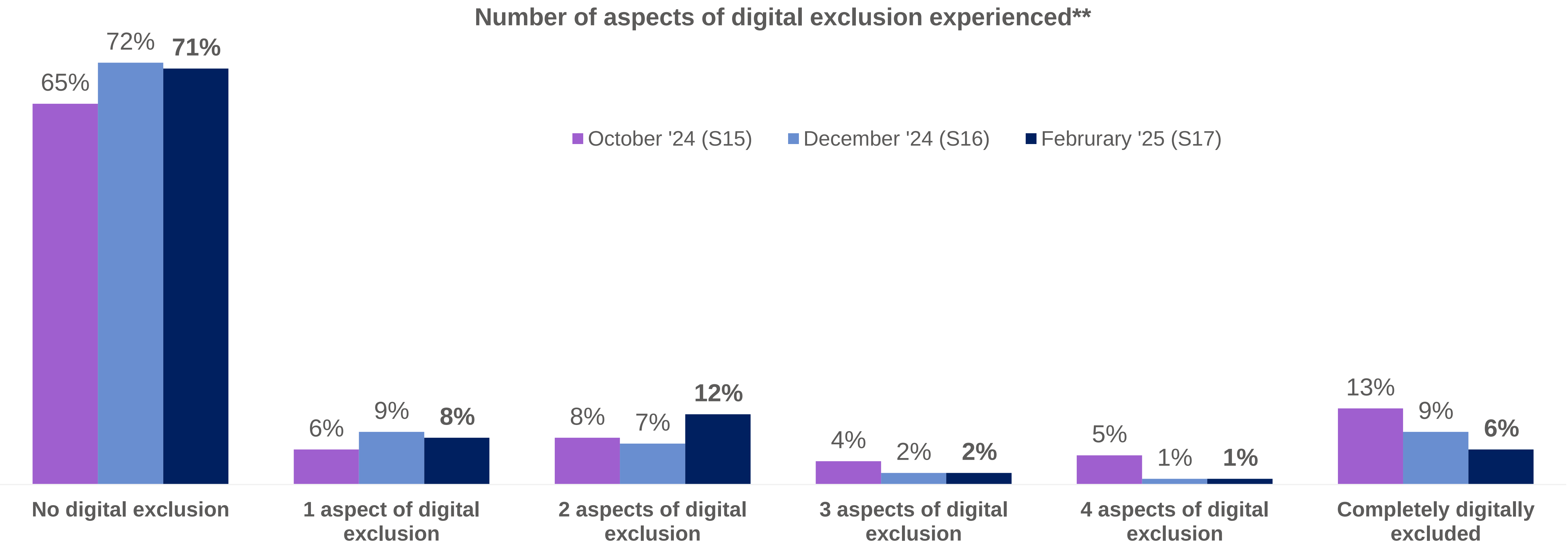
1 or more aspect of digital exclusion ...

Total	16-24	75+	Disabled
31%	24%	79%	57%



DI11. How often…? Unweighted base: 766 (Face to face respondents) Prefer not to say not shown. Question in was asked as a grid, between "you" and "others in your household". The data on this slide shows the percentages of households where there is someone (either you or others) who has said they are digitally excluded. *Aspects of digital exclusion = consistent and reliable access to an internet connection at home; to devices that allow access to the internet; affording access to the internet; skills needed to access and use digital services online; support needed to access and use digital services online

Wave-on-wave trends: February 2025 shows a fall – though not significant – in those who are completely digitally excluded compared to December 2024 and October 2024 (now at 6%)

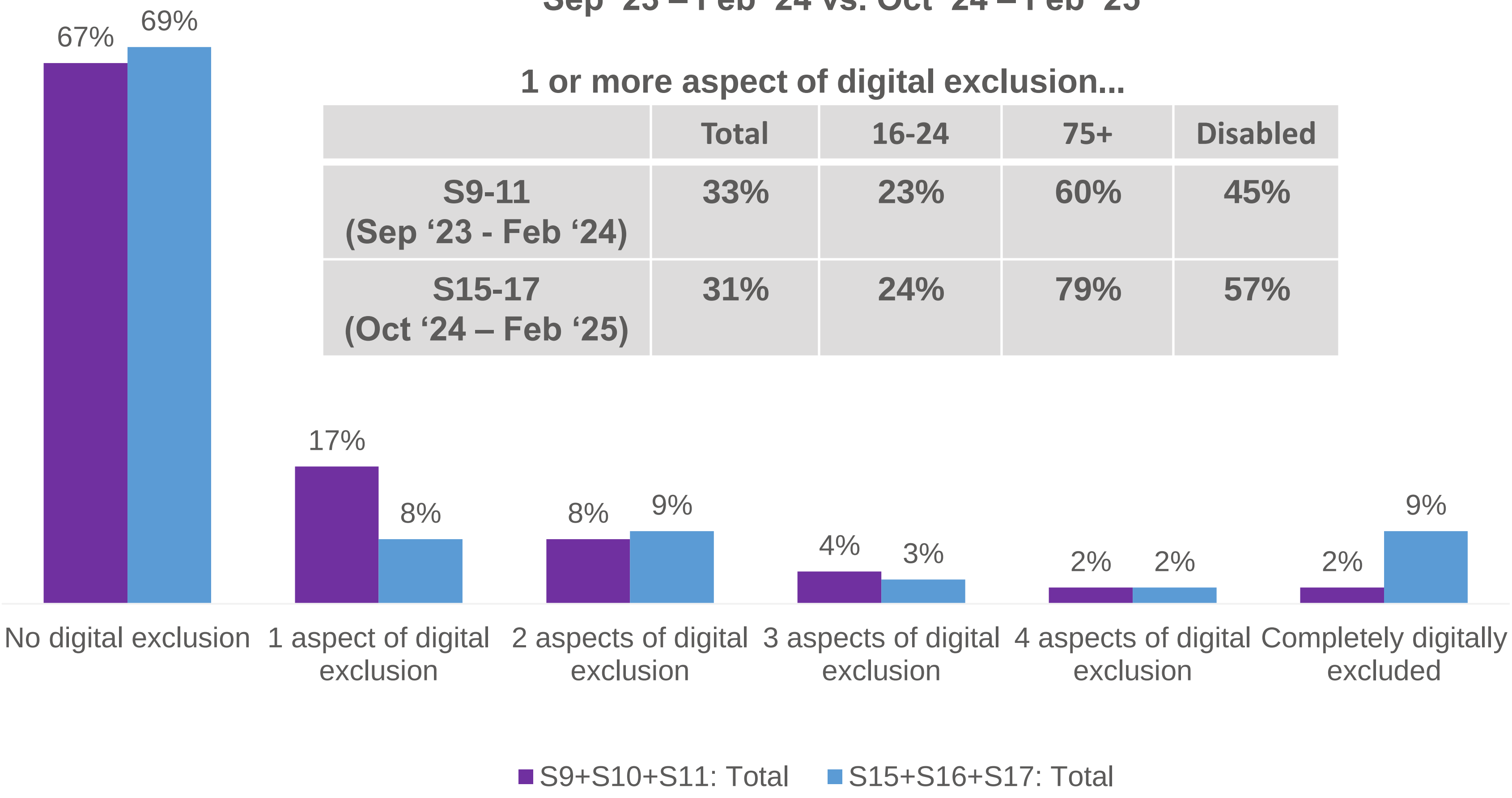


⬆⬇ Significantly higher/lower than the survey before

Unweighted base: S15+16+17, 756; Survey 15; 266; Survey 16, 250; Survey 17, 250 (Face to Face Respondents) **Aspects of digital exclusion = consistent and reliable access to an internet connection at home; to devices that allow access to the internet; affording access to the internet; skills needed to access and use digital services online; support needed to access and use digital services online

Year on year comparisons: It appears that the proportion of respondents experiencing any form of digital exclusion overall has remained stable, however, there have been increases in reported digital exclusion amongst those aged 75+ and disabled respondents. More than anything, this is likely to reflect the survey's methodological change*

Number of aspects of digital exclusion experienced
Sep '23 – Feb '24 vs. Oct '24 – Feb '25



1 or more aspect of digital exclusion...

	Total	16-24	75+	Disabled
S9-11 (Sep '23 - Feb '24)	33%	23%	60%	45%
S15-17 (Oct '24 – Feb '25)	31%	24%	79%	57%

***Change in Methodology**

From wave 12, the survey utilises a face-to-face methodology, while all surveys before this wave use a telephone approach.

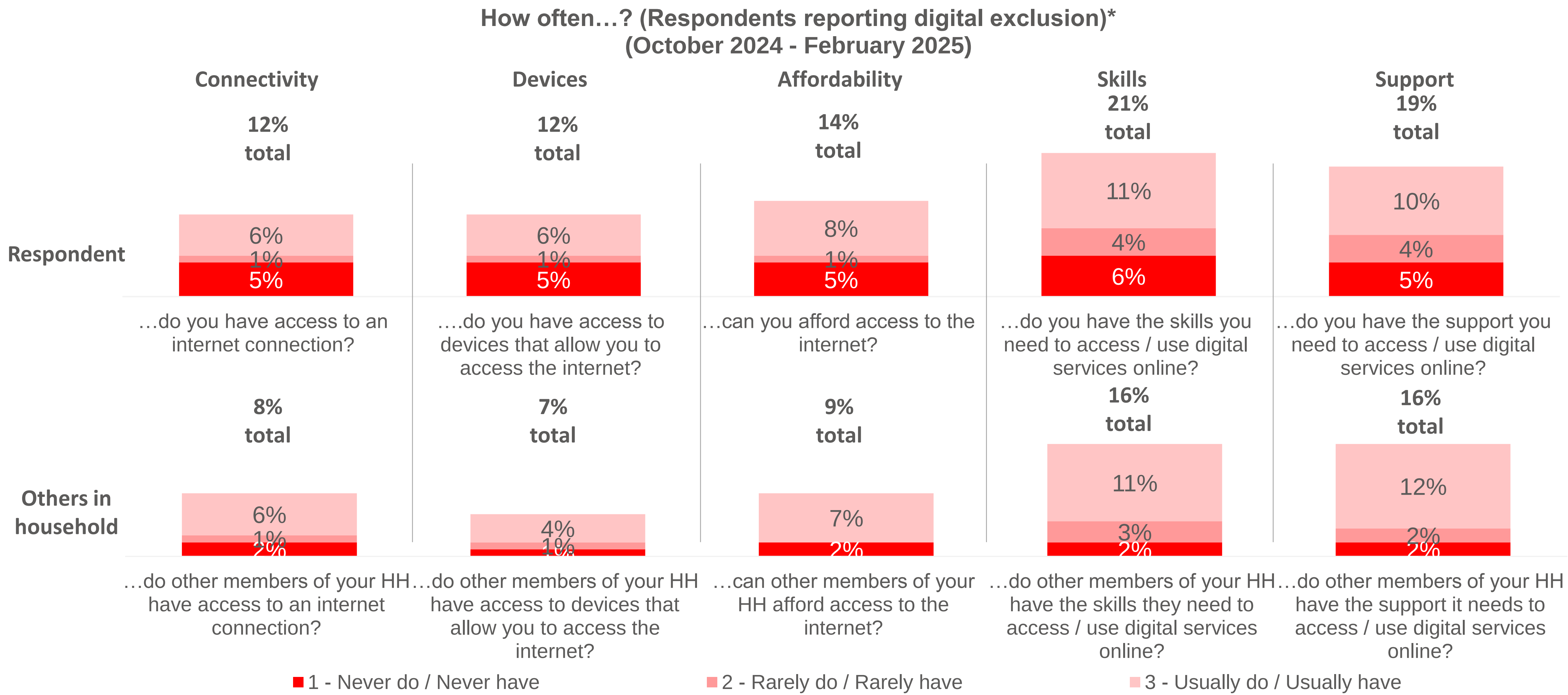
Changes in who we can talk to between the two approaches have impacted the results on this slide.

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

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

DI11. How often…? Unweighted base: S9-11 (757), S15-17 (766) (Face to Face respondents) Prefer not to say not shown. Question in S6 onwards was asked as a grid, between "you" and "others in your household". The data on this slide shows the percentages of households where there is someone (either you or others) who has said they are digitally excluded. Aspects of digital exclusion = consistent and reliable access to an internet connection at home; to devices that allow access to the internet; affording access to the internet; skills needed to access and use digital services online; support needed to access and use digital services online

Where respondents are experiencing digital exclusion, this continues to be driven by those saying that they have a lack of skills or support to allow them to access digital online services



DI_11. How often…? Unweighted base: 756; Survey 15, 266; Survey 16, 250; Survey 17, 250 (Face to face respondents) *Prefer not to say, 4, and 5 (Mostly do / have and Always do / have) not shown.

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

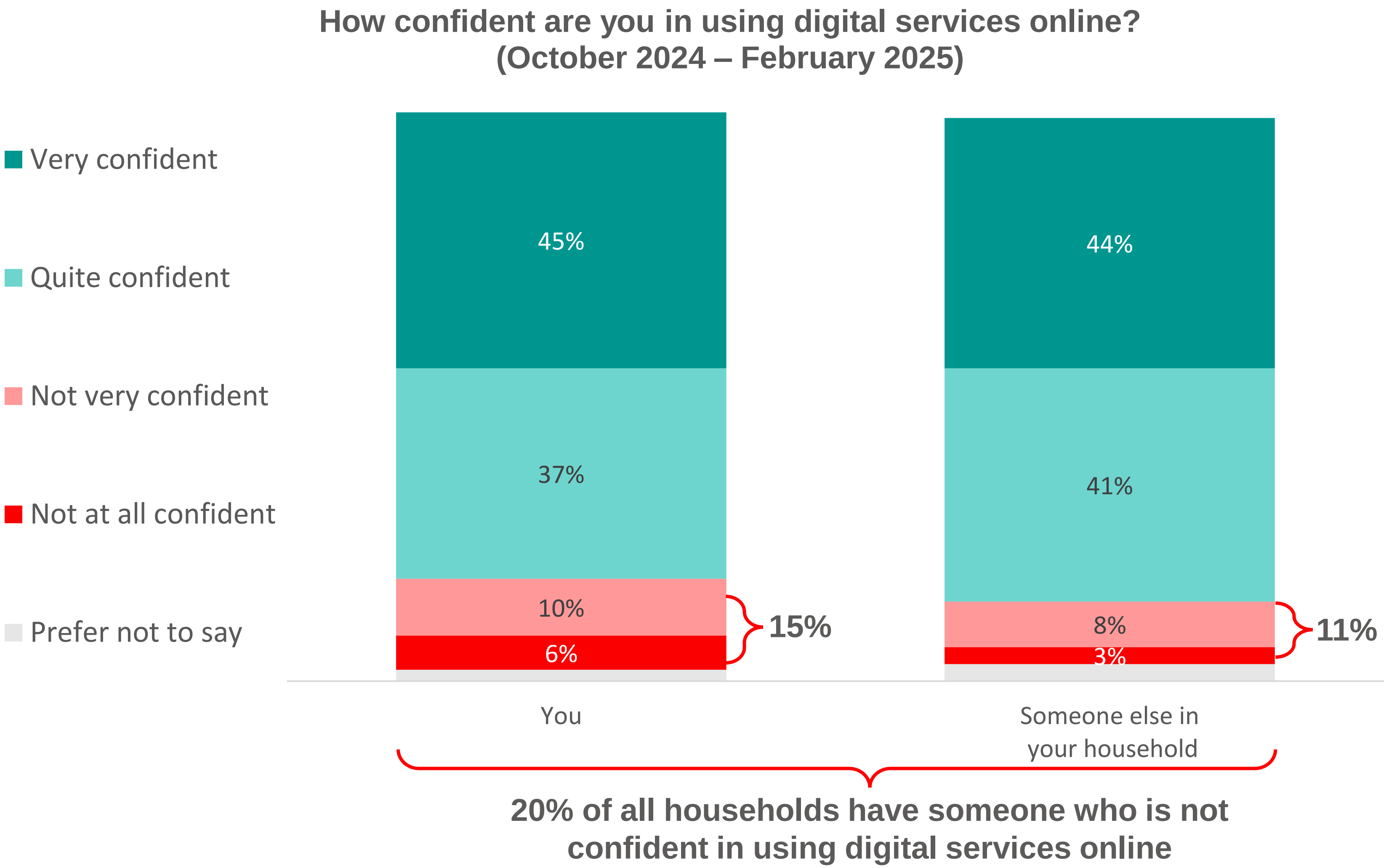
How often do you/do others in your household…?
(Showing households without the access/skills to get online all/most of the time)
October 2024 – February 2025

	Total	Aged 16-24 (n=84)	Aged 75+ (n=52)	Disabled respondents (n=149)
…have consistent and reliable access to an internet connection at home?	10%	4% ↓	33% ↑	19% ↑
…have consistent and reliable access to devices that allow access to the internet and use digital services online?	10%	6%	38% ↑	20% ↑
…can afford access to the internet?	13%	6% ↓	39% ↑	28% ↑
…have the skills they need to access and use digital services online?	17%	8% ↓	68% ↑	40% ↑
…have support needed to access and use digital services online?	17%	6% ↓	57% ↑	37% ↑

↑↓ Significantly higher/lower than total

DI_11. How often…? Unweighted base: 756; Survey 15, 266; Survey 16, 250; Survey 17, 250 (Face to face respondents)

1 in 10 respondents say they (15%) or others in their household (11%) are not confident using digital services online. In combination this equates to a fifth (20%) of households with someone lacking confidence. These figures are in line with results reported in the last survey publication



Respondents or someone in their household in the face-to-face sample more likely to be not very/not at all confident in using digital services online (vs. 19% GM average):

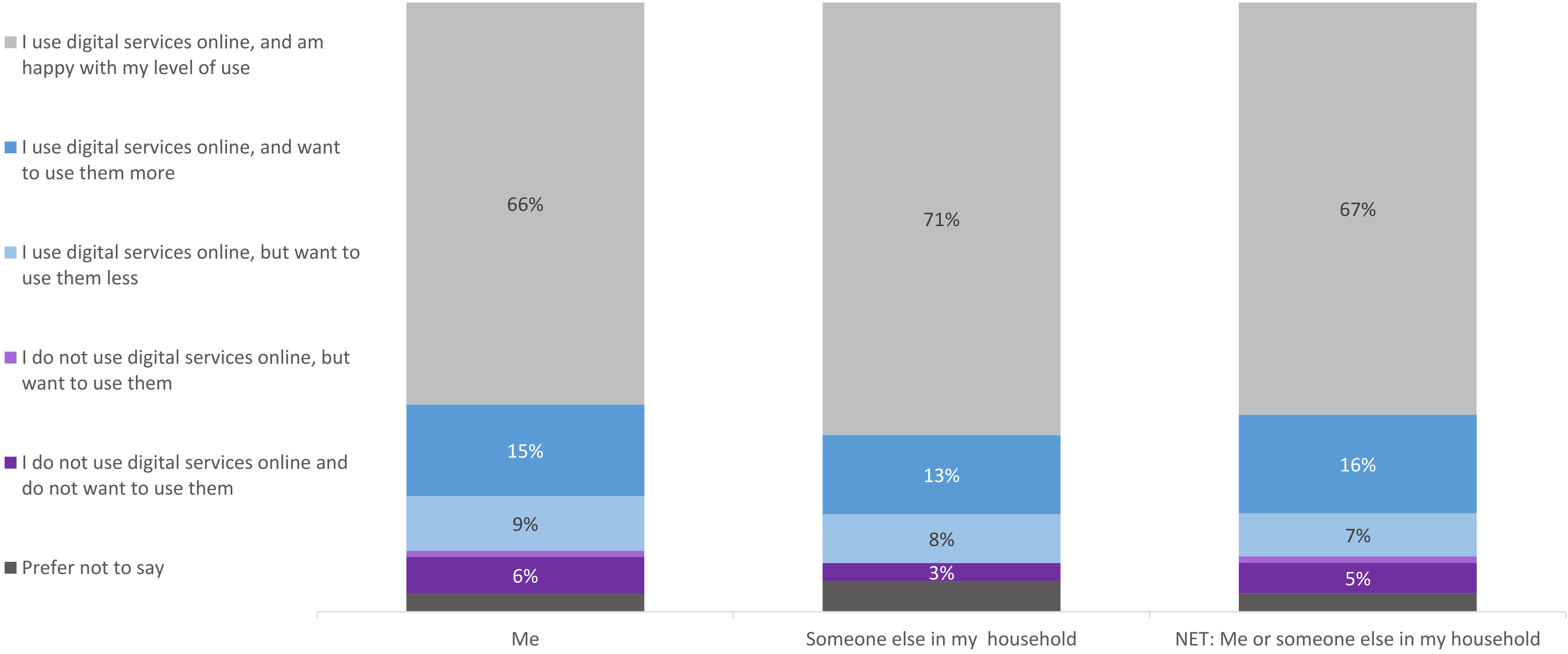
Demographics:

- Those aged 75+ (69%)
- Those aged 65+ in single person households (56%)
- Retired respondents (52%)
- Disabled respondents (36%) including those with a mobility disability (50%) and those with other disabilities (42%)
- Homeowners (30%)

DI10. Overall, how confident is your household in using the digital services online that it needs and wants?
Unweighted base: 756; Survey 15, 266; Survey 16, 250; Survey 17, 250 (Face to face respondents)

16% of households use digital services and want to use them more. Just 1% of people who do not use digital services online want to be able to do so – in line with previous surveys

Current and intended future use of digital services online (October 24 – February 25)



DI8. How would you describe your current and future intended use of digital services online?
Unweighted base: 756; Survey 15, 266; Survey 16, 250; Survey 17, 250 (Face to face respondents)

Appendix 1

More detail on changes in survey methodology

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

Surveys 1-11	Surveys 12 onwards (April 2024-)
Online panels (n=750)	Online panels (n=750)
River sampling (n=500)	Online rapid sampling (n=500)
Telephone sampling (n=250)	Face-to-face sampling (n=250)

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

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

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

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

Significance Testing and statistical difference – technical note

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

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

- The sample size included in each wave of the survey has differed (see the next two slides for details).

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

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

Sample information

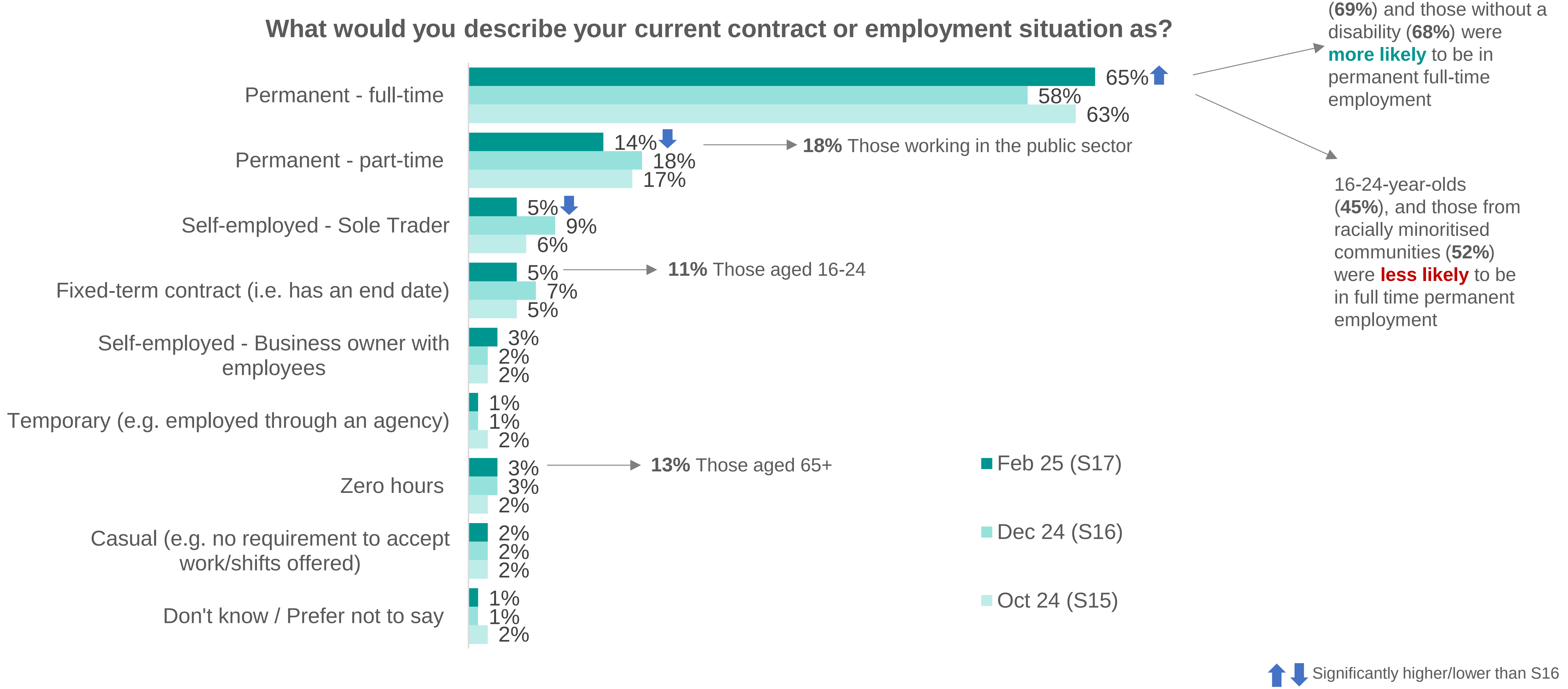
Survey	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Fieldwork start	9 Feb 22	25 Mar 22	1 Sep 22	20 Oct 22	7 Dec 22	2 Mar 23	5 May 23	26 June 23	4 Sept 23	13 Nov 23	29 Jan 24	13 May 24	8 July 24	19 Aug 24	14 Oct 24	9 Dec 24	17 Feb 25
Fieldwork end	25 Feb 22	11 April 22	24 Sep 22	3 Nov 22	21 Dec 22	14 Mar 23	22 May 23	10 July 23	18 Sept 23	29 Nov 23	13 Feb 24	25 May 24	19 July 24	2 Sept 24	28 Oct 24	23 Dec 24	28 Feb 25
Report publication	Mar 22	Apr 22	Sep 2022	Nov 2022	Jan 2023	Apr 2023	June 2023	July 2023	Sept 2023	Dec 2023	Mar 2024	June 2024	Aug 2024	Sept 2024	Nov 2024	Jan 2025	March 2025
Total respondents	1385	1467	1677	1636	1470	1767	1488	1612	1560	1546	1460	1551	1540	1482	1517	1523	1515
Web respondents	762 (55%)	794 (54%)	785 (47%)	791 (48%)	721 (49%)	765 (43%)	789 (53%)	766 (48%)	755 (48%)	754 (49%)	766 (52%)	775 (50%)	770 (50%)	775 (52%)	759 (50%)	762 (50%)	775 (51%)
F2F (previously phone) respondents	250 (18%)	250 (17%)	235 (14%)	270 (17%)	250 (17%)	250 (14%)	251 (17%)	250 (16%)	248 (16%)	250 (16%)	259 (18%)	251 (16%)	250 (16%)	241 (16%)	266 (18%)	250 (16%)	250 (17%)
Online rapid (previously river) sampling	373 (27%)	423 (29%)	657 (39%)	575 (35%)	499 (33%)	752 (43%)	448 (30%)	596 (37%)	557 (36%)	542 (35%)	435 (30%)	525 (34%)	517 (34%)	463 (31%)	492 (32%)	511 (34%)	487 (32%)

Key demographics (before weighting applied)

Survey	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Male	597	593	739	666	686	782	657	701	680	664	673	678	657	598	668	673	630
Female	761	843	906	970	784	964	831	877	852	840	766	843	856	866	823	806	853
16-24	113	96	123	170	111	114	133	146	123	139	150	138	139	156	141	151	161
25-44	413	421	455	503	440	483	487	457	412	460	405	531	543	451	496	536	517
45-64	484	538	525	565	570	644	506	624	607	506	489	546	566	572	557	533	525
65+	375	412	574	398	349	526	362	385	418	441	416	336	292	303	323	303	312
White	1201	1314	1503	1405	1297	1572	1278	1390	1358	1319	1253	1251	1281	1259	1284	1266	1238
Within racially minoritised communities	166	137	159	208	173	181	194	197	194	218	195	218	246	216	222	244	263

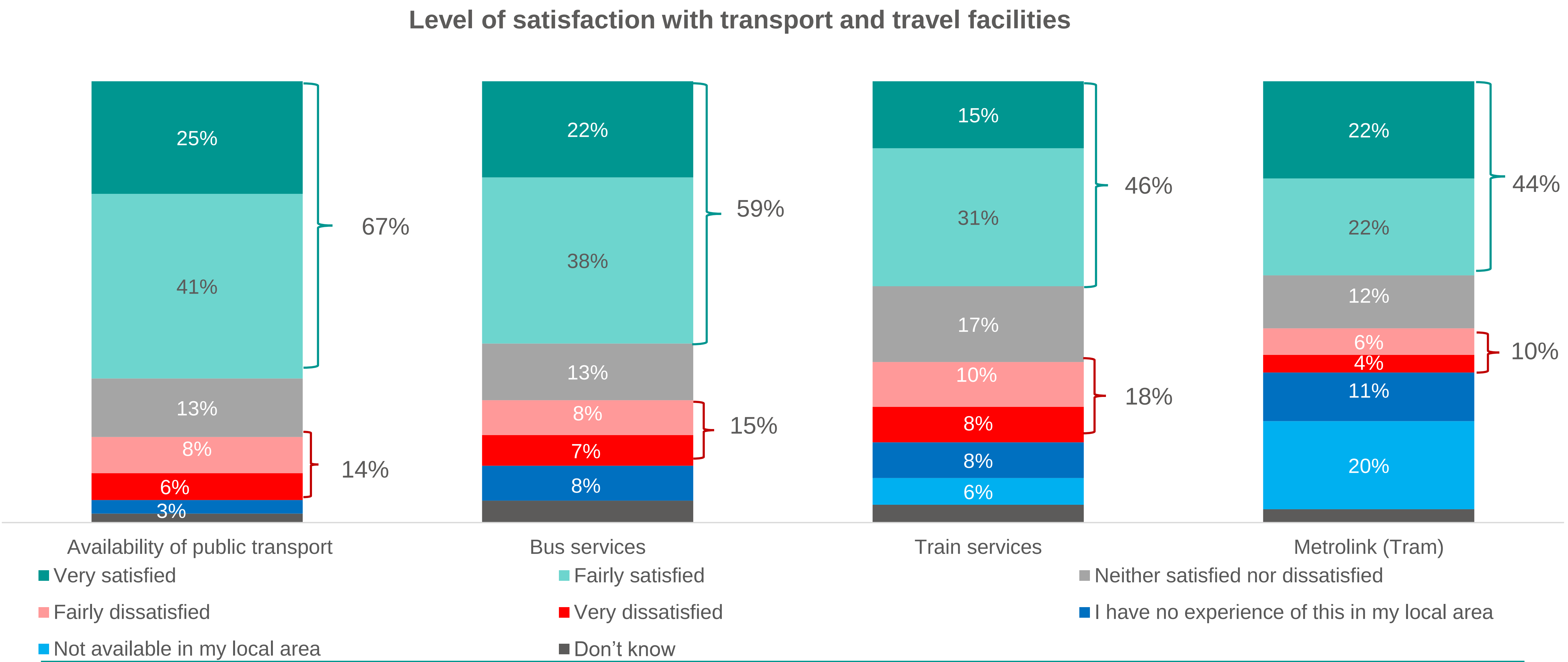
Appendix 2

Just under three fifths (58%) of respondents are employed in permanent positions, which has dropped significantly since last wave (63%) - with a further 18% in part-time positions, this has remained stable since last wave.



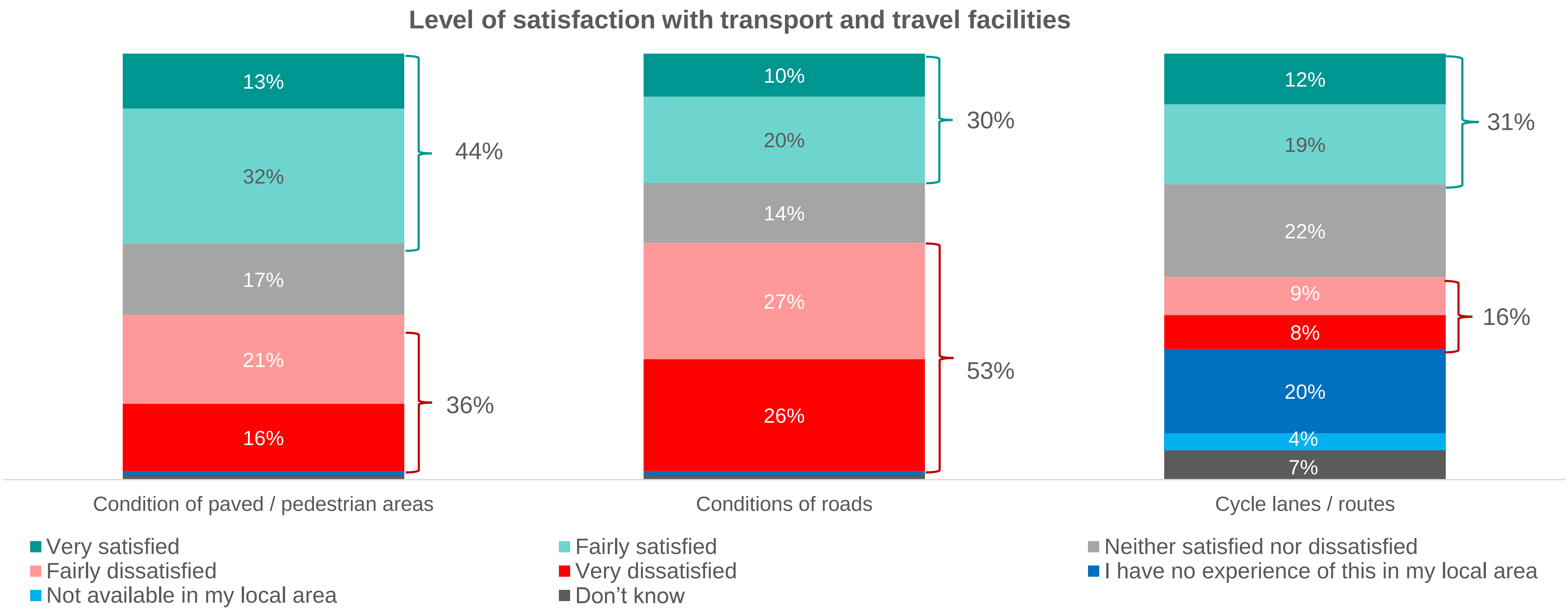
GW2_4. What would you describe your current contract or employment situation as? Base: Those who are employed S15 (878), S16 (896), S17 (868)

Respondents continue to be broadly satisfied with transport and travel facilities. The lowest level of satisfaction was reported for train services and the Metrolink, at 44%, though this is offset by high levels of respondents saying this is not available in their local area



LA7. Thinking about where you live, how satisfied or dissatisfied are you with your experience of the following in your local area?
Unweighted base: All respondents Survey 17, 1515

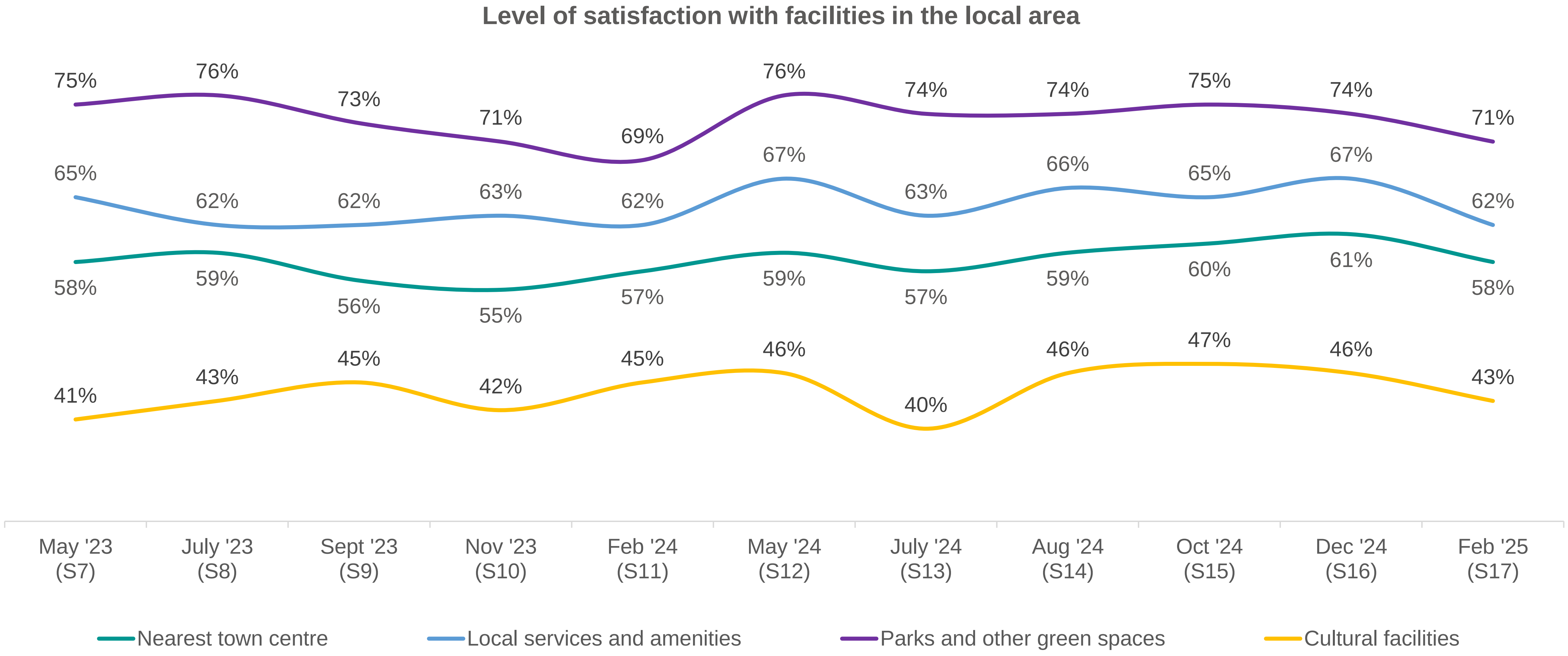
Dissatisfaction with the condition of the roads continues to make up 2 in 5 respondents (44%), while dissatisfaction with conditions of roads and cycle lanes and routes makes up just under a third of respondents (30% and 31%)



Figures in brackets show change since July (S13)

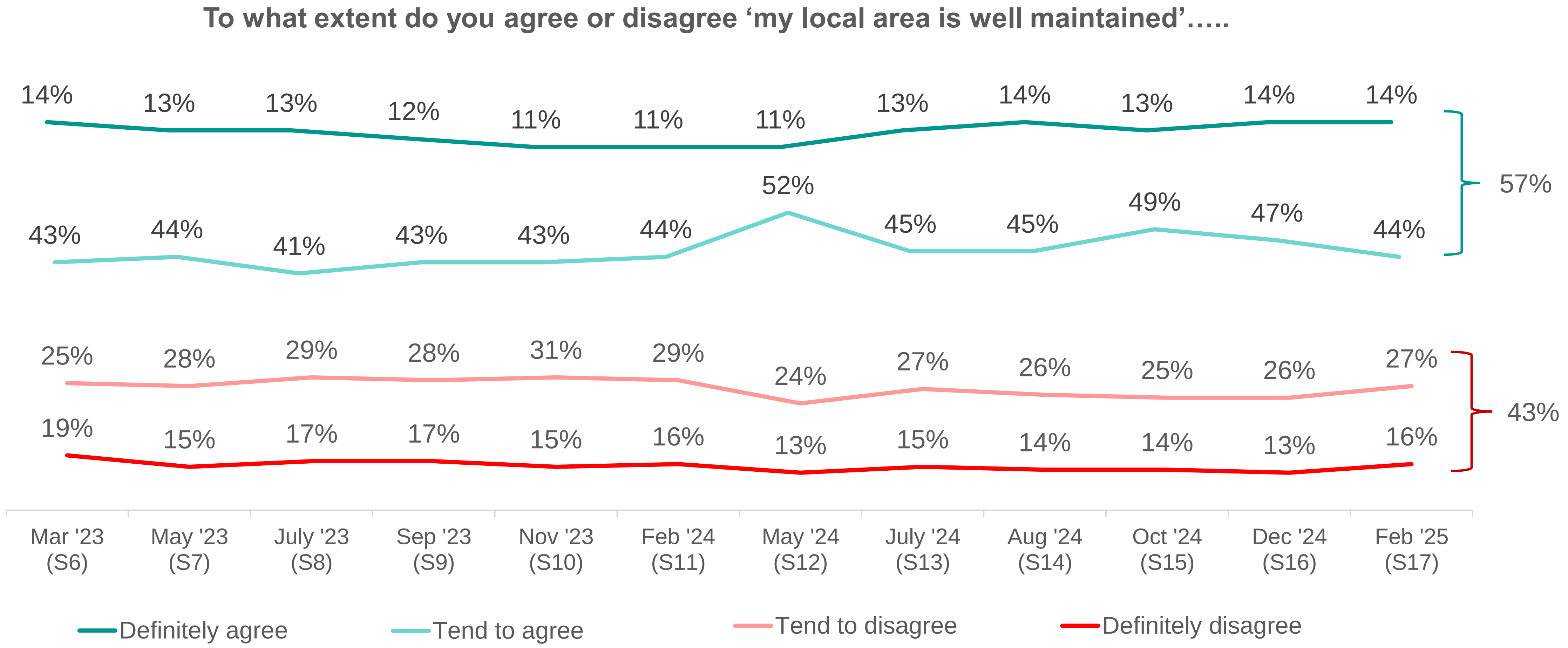
LA7. Thinking about where you live, how satisfied or dissatisfied are you with your experience of the following in your local area?
Unweighted base: All respondents Survey 17, 1515

Satisfaction with facilities appears to be taking a downturn this wave, though satisfaction is still highest with parks and other green spaces and lowest for cultural facilities as with previous waves



LA4. Generally, how satisfied or dissatisfied are you with…?
Unweighted base: S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517; S16, 1523; S17, 1515 (All respondents).

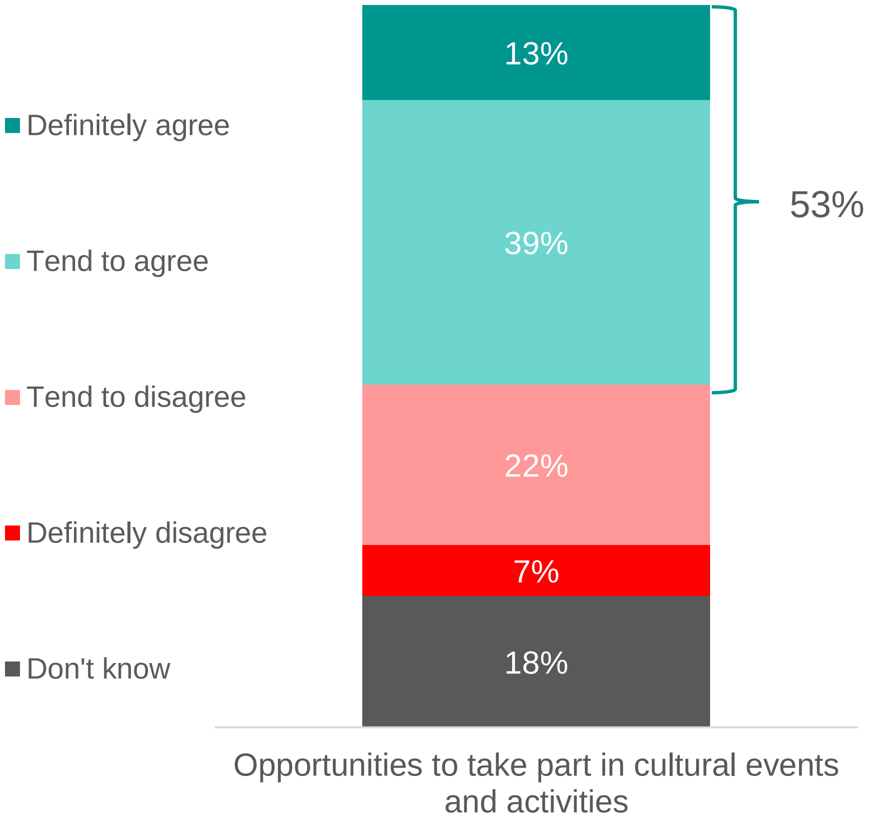
Respondents who agree that their local area is well maintained has decreased significantly since December 2024, with 3 in 5 (57% cf. 61%) respondents agreeing and 2 in 5 (43% cf. 39%) disagreeing.



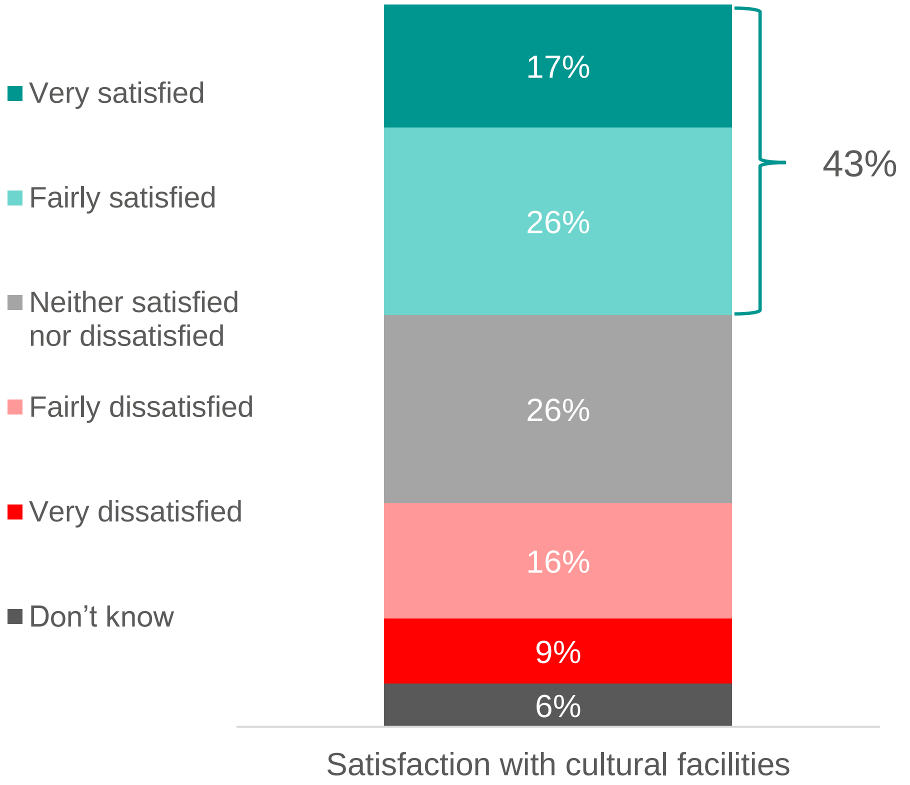
LA6. To what extent do you agree or disagree with the following statements about your local area? Only valid responses shown
Unweighted base: S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517; S16, 1523; S17, 1515 (All respondents).

Just over half (53%) agree there are opportunities to take part in cultural events and activities in their local area. 2 in 5 (43%) are satisfied with cultural facilities available, such as museums, theatres and events…

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

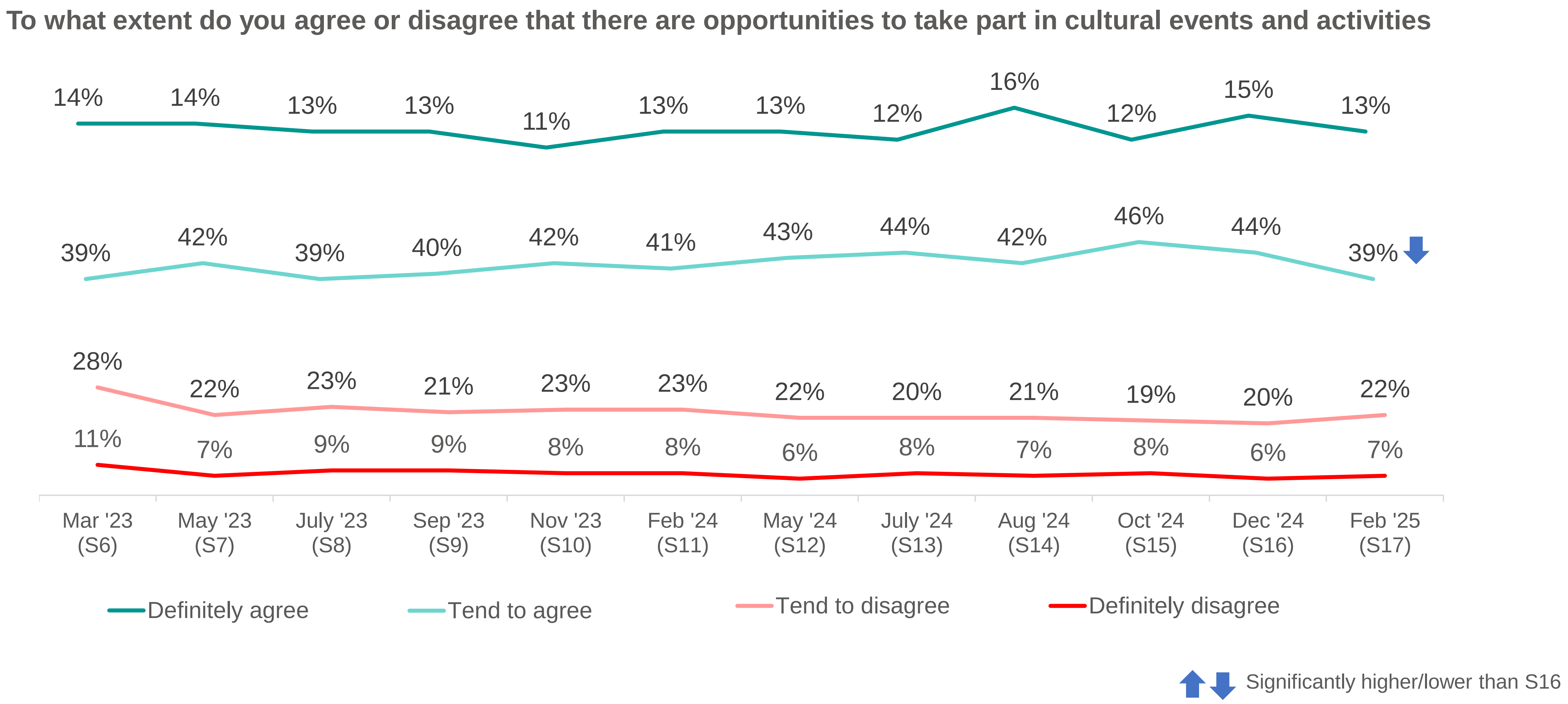


Satisfaction with cultural facilities such as museums, theatres, and events



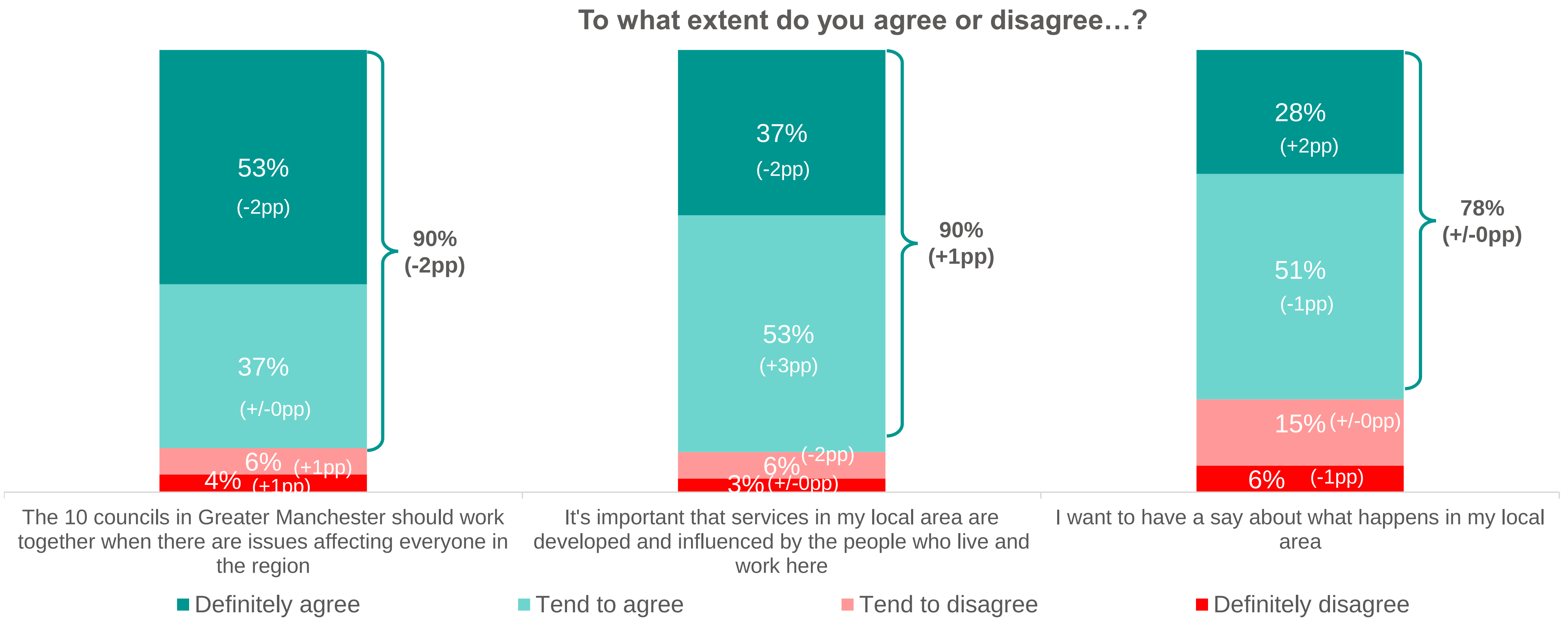
LA5. To what extent do you agree or disagree that there are opportunities to take part in cultural events and activitiess in your local area? LA4. Generally, how satisfied or dissatisfied are you with…? Unweighted base: Greater Manchester Residents S17, 1515

… and there has been a significant decrease in the proportion who ‘tend to agree’ there are opportunities to take part in cultural events and activities



LA5. To what extent do you agree or disagree that there are opportunities to take part in cultural events and activitiess in your local area?
Unweighted base: S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517; S16, 1523; S17, 1515 (All respondents).

GM respondents continue to agree that the **10 councils should work together** (90%), that **services in their local area are developed and influenced by people who live and work there** (90%), and they **want to have a say about what happens in their local area** (78%)



Figures in brackets show change since October 2024 (S15)

LA6. To what extent do you agree or disagree with the following statements about your local area?
Unweighted base: Survey 15, 1517; Survey 16, 1523; Survet 17, 1515 (All responses) Only valid responses shown

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