GREATER MANCHESTER
DOING THINGS DIFFERENTLY

Greater Manchester Residents' Survey

Survey 13 (main report)

July 2024

Fieldwork conducted 8 - 22 July

Report contents

Introduction and methodology

Background

- This report presents summary findings for a quantitative **survey carried out between 8th and 22nd July 2024, with a representative sample of 1,540 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, poverty proofing and access to health and social care services, satisfaction with the local area, cost of living and digital access**.
- Data from July 2024 (survey 13) is presented alongside that from similar Greater Manchester resident surveys undertaken in May (survey 12) and February 2024 (survey 11). 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
  - poverty proofing and access to health and social care services – data from individual surveys is shown separately
  - local area – data from individual surveys is shown separately, except when commenting on trends for specific sub-groups or districts
  - cost of living – data from individual surveys is shown separately
  - digital inclusion – merged data for surveys 11, 12 and13 is used, drawing on telephone (11) and face-to-face (surveys 12 and 13) 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 July 2024, BMG Research has undertaken thirteen surveys, each comprising circa 1,500 residents from across Greater Manchester.
- In surveys 1 to 11 the sample was comprised of approximately 750 online panel respondents, 250 telephone respondents, and 500 online 'river sampled' respondents (those who responded to adverts, offers and invitations to take part in the surveys).
- **From survey 12 (May 2024) onwards the methodology was revised**, to now include around:
  - 750 online panel respondents
  - 500 online rapid respondents (see Appendix for more details), and
  - 250 face-to-face respondents
- This mix of online and face-to-face surveying was agreed so that the most representative and robust sample of Greater Manchester residents can be regularly sourced within available time and budget. **One of the main reasons the face-to-face element is included is so that those without internet access can take part in the survey. It has replaced the previous telephone approach because analysis suggests those who are truly digitally excluded are less likely to be able to take part by phone.***
- This new methodology will remain consistent for the duration of 2024/25. See Appendix for more details.
- Each survey is designed to take **15 minutes** on average for respondents to complete; however, due to the emotive nature of some topics covered, face-to-face interviews tend to take longer than this.
- **Quotas** are set to ensure the sample broadly reflects the profile of Greater Manchester's population by gender, age, ethnicity and disability, with further consideration of wider protected and key characteristics.
- **Weights** have been applied to the data gathered to ensure the sample matches the population profile by age, gender, ethnicity, disability and locality, and to ensure consistency between individual surveys.

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

Report contents and guidance

Identifying significant differences / change

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

Sample sizes

- On some questions, **responses have been filtered only to include respondents to whom the question is relevant** (e.g. those in work, or with children), and so bases are lower than the full sample of 1,540 respondents in some instances. Where this is the case, this has been noted in the footnotes of each slide, along with the unweighted base sizes.

Language - inequalities

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

Health and wellbeing

Health and wellbeing – context

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

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

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

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

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

For the first time, 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.

Health and wellbeing– key findings (1 of 2)

WELLBEING

- Levels of anxiety among Greater Manchester respondents overall appear to have improved over the past 18-months. For example, the proportions of respondents in the latest survey reporting ‘high’ levels of anxiety has declined when compared with a year and a half ago.
- In the short term, since May 2024, wellbeing measures show more of a mixed picture:
  - Life satisfaction has declined slightly (61% reporting ‘very high’ or ‘high’ satisfaction, compared to 65% in May)
  - But the level of those with ‘very low’ anxiety have eased for the fourth wave in a row, with now just over a quarter experiencing this (27%, compared to 25% in May, 24% in Feb, and 22% in Nov).
- There has been little or no change in the proportions feeling the things they do in their life are worthwhile (around two thirds, 64%) or reporting high levels of happiness (60%, compared to 61% in May).
- Half of GM respondents (53%) say their mental health has been negatively impacted in some way the past month – respondents commonly attributed this to waiting too long for a GP or hospital appointment (24%) or having to cut back on energy use at home (17%). On the latter, GM respondents are significantly less likely than GB respondents to say this has occurred in the past month (cf. 24%)
- Two in five (43%) say their physical health has been negatively impacted in some way the past month, significantly higher than the GB average (36%). This is mainly due to waiting too long for a GP or hospital appointment (20%) or having to cut back on energy use at home (10%).

HOPE AND FAIRNESS (new measures, included for the first time in this survey)

- Greater Manchester respondents are slightly more likely to report feeling hopeful about their future than Great Britain (76% in GM, compared to 73% in GB). Those more likely to feel unhopeful include those with a disability (28%) and those with low levels of life satisfaction (61%)
- 16% of Greater Manchester respondents feel they are treated unfairly by society – higher than the 13% for Great Britain. Those more likely to feel they are treated unfairly includes those with a disability (28%) and those who do not feel able to look after their own health (39%)

Health and wellbeing– key findings (2 of 2)

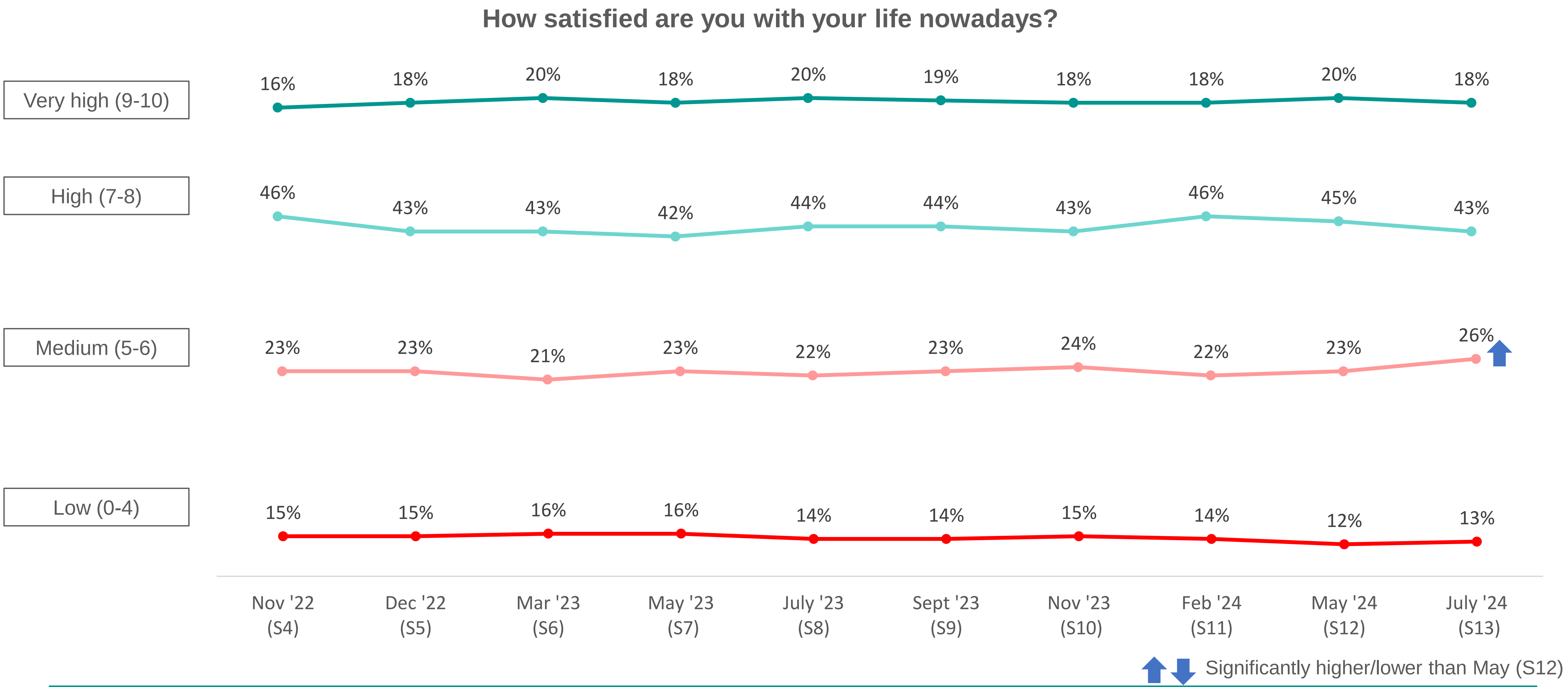
HEALTH CONFIDENCE

- July's results show a slight decrease in the Health Confidence Score for Greater Manchester (71.6, was 72.1 in May). Despite this, the score remains higher than its lowest level of 70.0 back in November 2023
    - This score of 71.6 represents a 'moderate' level of health confidence among Greater Manchester respondents.
- This slight fall in overall health confidence results from similar small reductions in individual scores for residents…
    - knowing enough about their health (66.6, reduced by 1.5 points since May),
    - being able to look after their own health (71.2, reduced by 0.2 points)
    - feeling involved in decisions about themselves (81.3, reduced by 1.0 points)
- These decreases are, however, partially offset by a slight increase in the score for residents feeling able to get the right help if they need it (67.7, increase of 1.3 points since May)

HEALTH CONFIDENCE – DISABLED RESPONDENTS

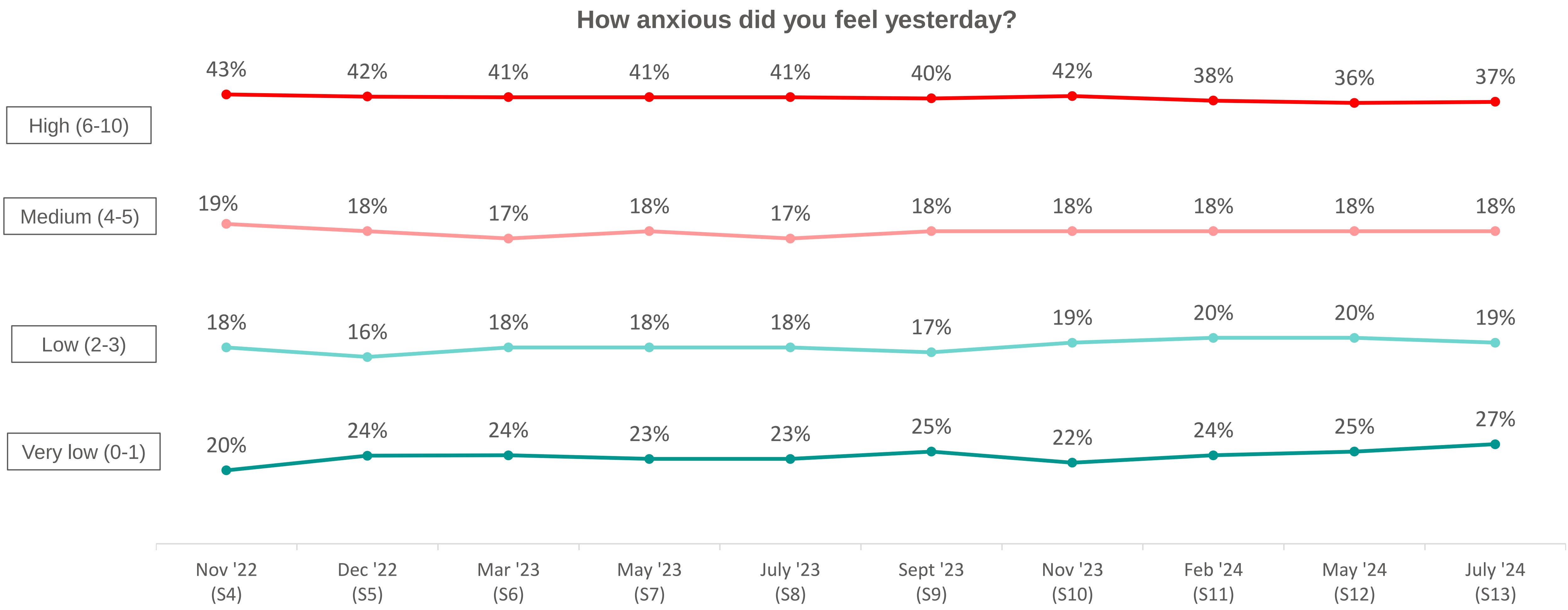
- Disabled respondents remain significantly more likely to respond negatively, reporting a health confidence score of 64.0 (compared to 71.6 for all respondents). This is still rated as 'moderate' health confidence (scores between 60 and 79).
    - The gap in the overall health confidence score between disabled and all respondents has increased slightly since May (7.6 points difference, was 7.4 points difference in May).
    - This gap is driven primarily by differences in feeling able to look after their own health (12.5 points difference – 58.7 for disabled respondents compared to 71.2 points overall); this means that disabled respondents' health confidence is rated 'low' in this area
- While disabled respondents' health confidence score has decreased slightly since May (was 64.7), it remains higher than this time last year (was 63.1 in July 2023).

Life satisfaction has slightly decreased since May, with similar sized reduction in those reporting 'high' satisfaction and an increase in those reporting 'medium' satisfaction. Over the long term, levels of satisfaction have remained fairly stable in each category of scoring.



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

While not a significant change since May, levels of those with ‘very low’ anxiety continue to improve in the long term. Those reporting these levels are at the highest level since tracking began in November 2022.



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

Despite slight positive movement, those more likely to have low levels of life satisfaction and high levels of anxiety continue to include those with long term health conditions and renters

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

Demographics:

- Those with a disability (27%), including those with mental ill health (38%), a learning disability (27%), a sensory disability (21%) or a mobility disability (22%)

Individual and/or family circumstance:

- Those who do not think the things they do in their life are worthwhile (60%)
- Those with low levels of happiness (56%)
- Those who do not feel they can look after their own health (54%)
- Those not in work due to ill health or disability (43%)
- Those dissatisfied with their local area (31%)
- Those who would not recommend their local area as a place to live (25%)
- Those who have a physical or mental health condition lasting longer than 12 months (23%)
- Those who have a condition that reduces their ability to do activities by a lot (30%) and by a little (23%)
- Those with high levels of anxiety (22%)
- Those who feel unable to save money in the next 12 months (20%)
- Those renting their home (19%) including renting from a Housing Association / Trust (22%)
- Those living in single person households (18%)

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

Demographics:

- Those who are bisexual (54%)
- Those with a disability (53%) including those with mental ill health (70%), a learning disability (64%), a mobility disability (42%) or other disability (50%)
- Those aged 16-24 (44%) or 25-44 (44%)
- Respondents from Minority Ethnic Groups (43%), specifically those who are Black or Black British (49%)
- Female respondents (40%)

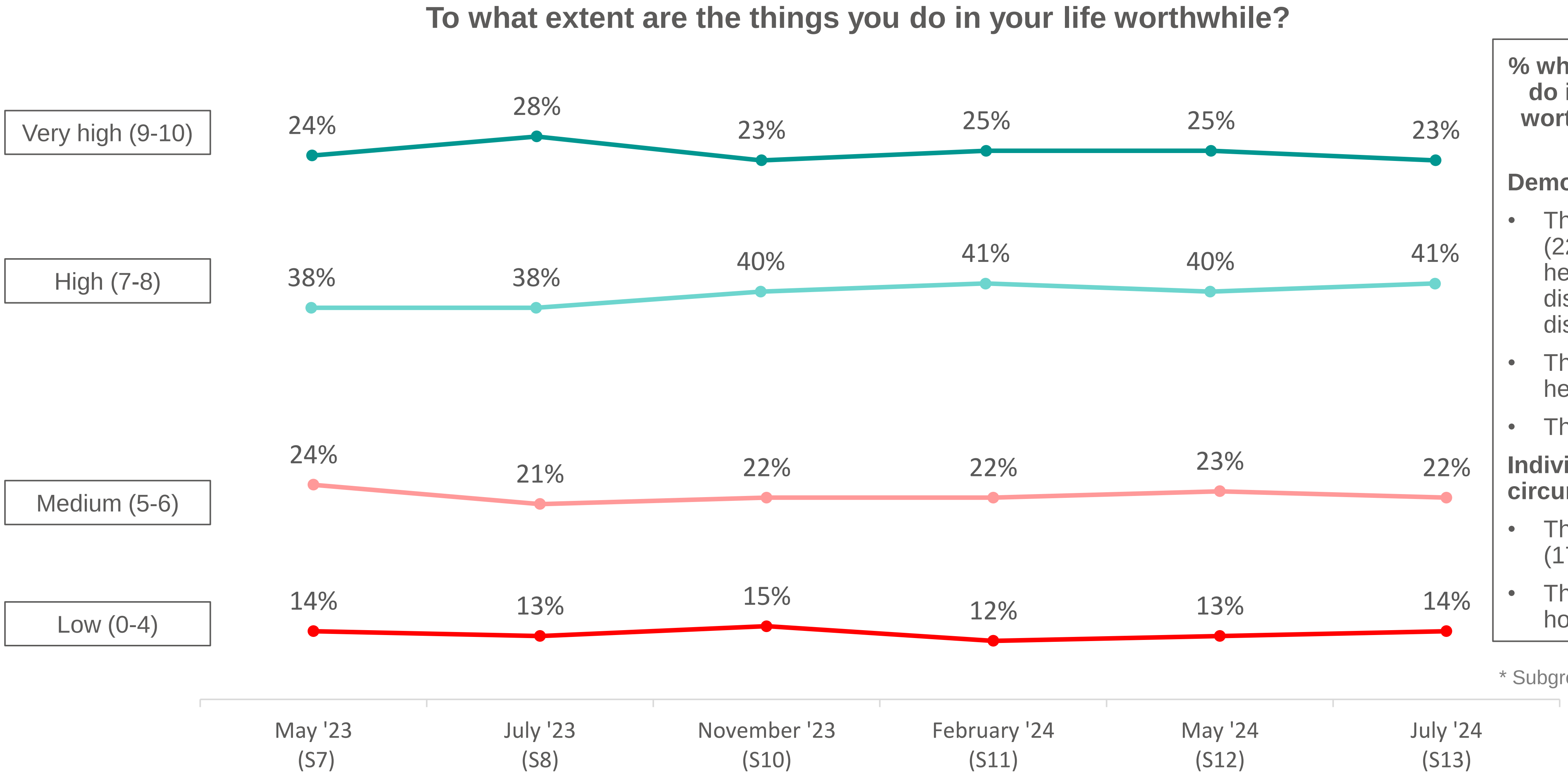
Individual and/or family circumstance:

- Those not in work due to ill health or disability (60%)
- Those with a physical or mental condition lasting longer than 12 months (50%), specifically those whose condition reduces their ability to do activities a lot (58%)
- Those with children under 5 years old (48%)
- Those earning up to £15,599 (47%)
- Those who currently have caring responsibilities (43%) or previously have (51%)
- Those renting their home (43%) including from a Local Authority / Council (44%), or a Housing Association / Trust (41%)

* Subgroup analysis uses merged data from S11, 12 and 13 combined

A1. Where 0 is "not at all" and 10 is "completely"… A2. Where 0 is "not at all" and 10 is "completely"… Unweighted base: Greater Manchester Residents Surveys 11-13, 4551

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



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

Demographics:

- Those who have a disability (22%), including mental ill health (34%), a mobility disability (18%) or sensory disability (19%)
- Those who are not heterosexual (19%)
- Those aged 16-24 (17%)

Individual and/or family circumstance:

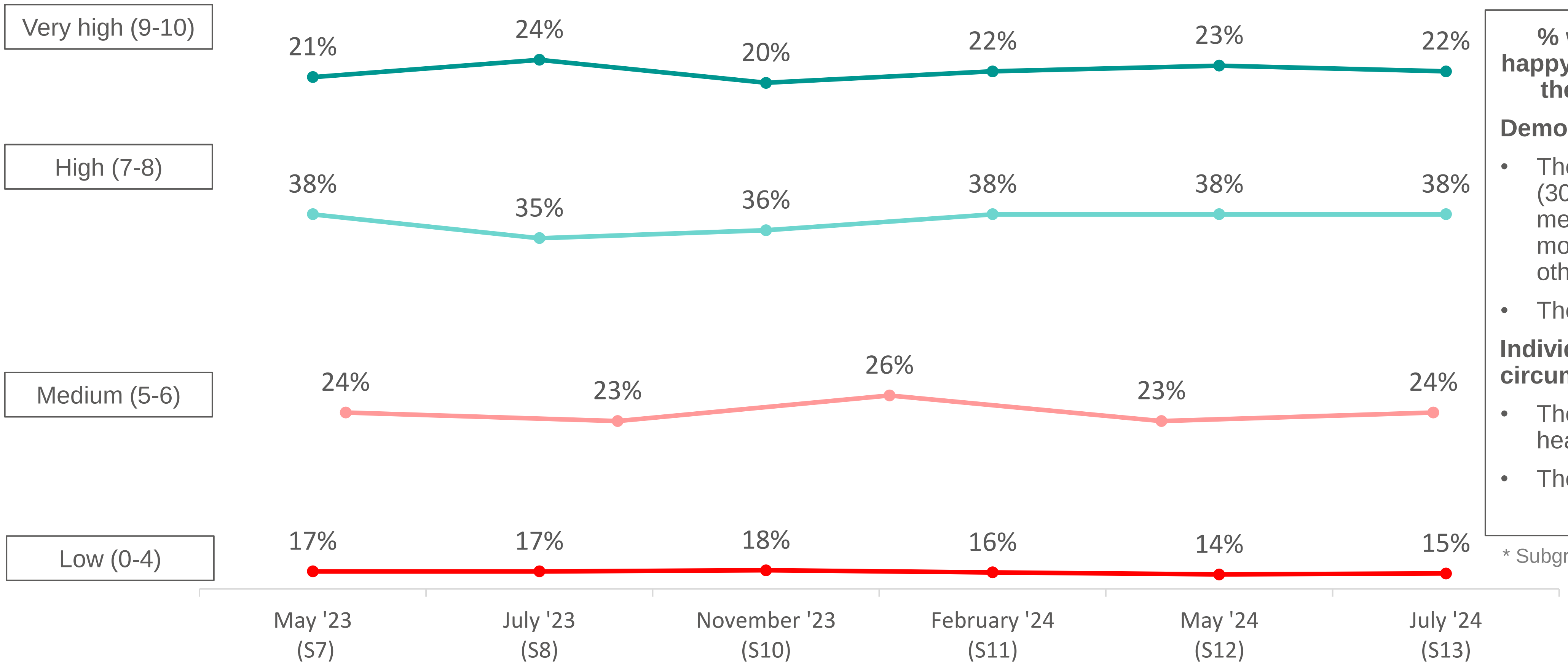
- Those who rent their home (17%)
- Those living in single person households (16%)

* Subgroup analysis uses merged data from S11-13

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: Greater Manchester Residents Survey 7: 1488, Survey 8: 1612, Survey 9: 1560, Survey 10: 1546, Survey 11: 1460, Survey 12: 1551, Survey 13: 1540 Thresholds are applied to responses to convert the 11-point scale into the categories shown. Unweighted base: Greater Manchester Residents Survey 12, 1551. Survey 11+12+13= 4551 (all respondents).

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

How happy did you feel yesterday?



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

Demographics:

- Those who have a disability (30%), including those with mental ill health (43%), a mobility disability (25%) or other disability (28%)
- Those aged 16-24 (20%)

Individual and/or family circumstance:

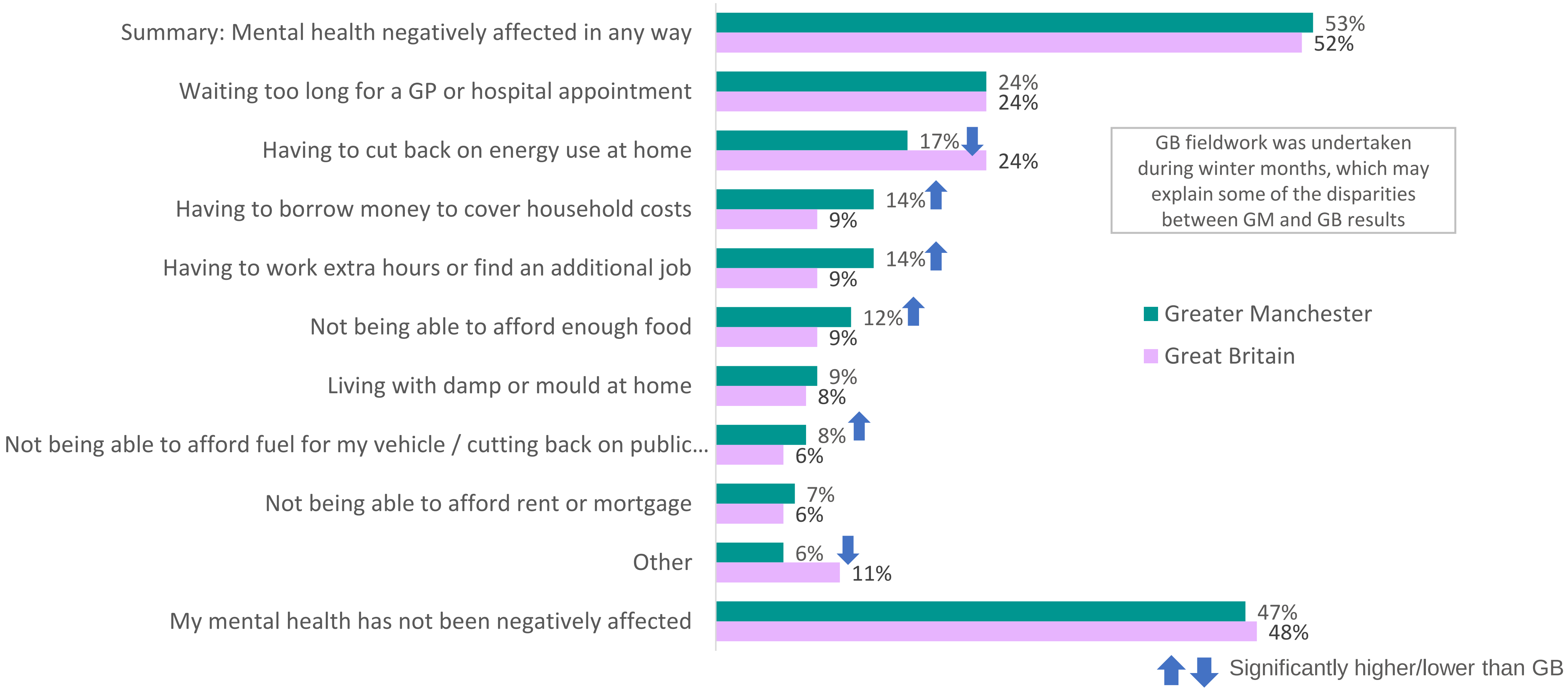
- Those not in work due to ill health or disability (44%)
- Those who are renting (21%)

* Subgroup analysis uses merged data from S11-13

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”? Survey 7: 1488, Survey 8: 1612, Survey 9: 1560, Survey 10: 1546, Survey 11: 1460, Survey 12: 1551, Survey 13: 1540 Thresholds are applied to responses to convert the 11-point scale into the categories shown. Unweighted base: Greater Manchester Residents Survey 11: 1460, Survey 12: 1551. Survey 11+12+13= 4551 (all respondents).

Equal shares of Greater Manchester and Great Britain respondents say their mental health has been negatively affected in the past month. But GM respondents are more likely to have borrowed money, worked extra hours, or been unable to afford food or fuel than the GB average

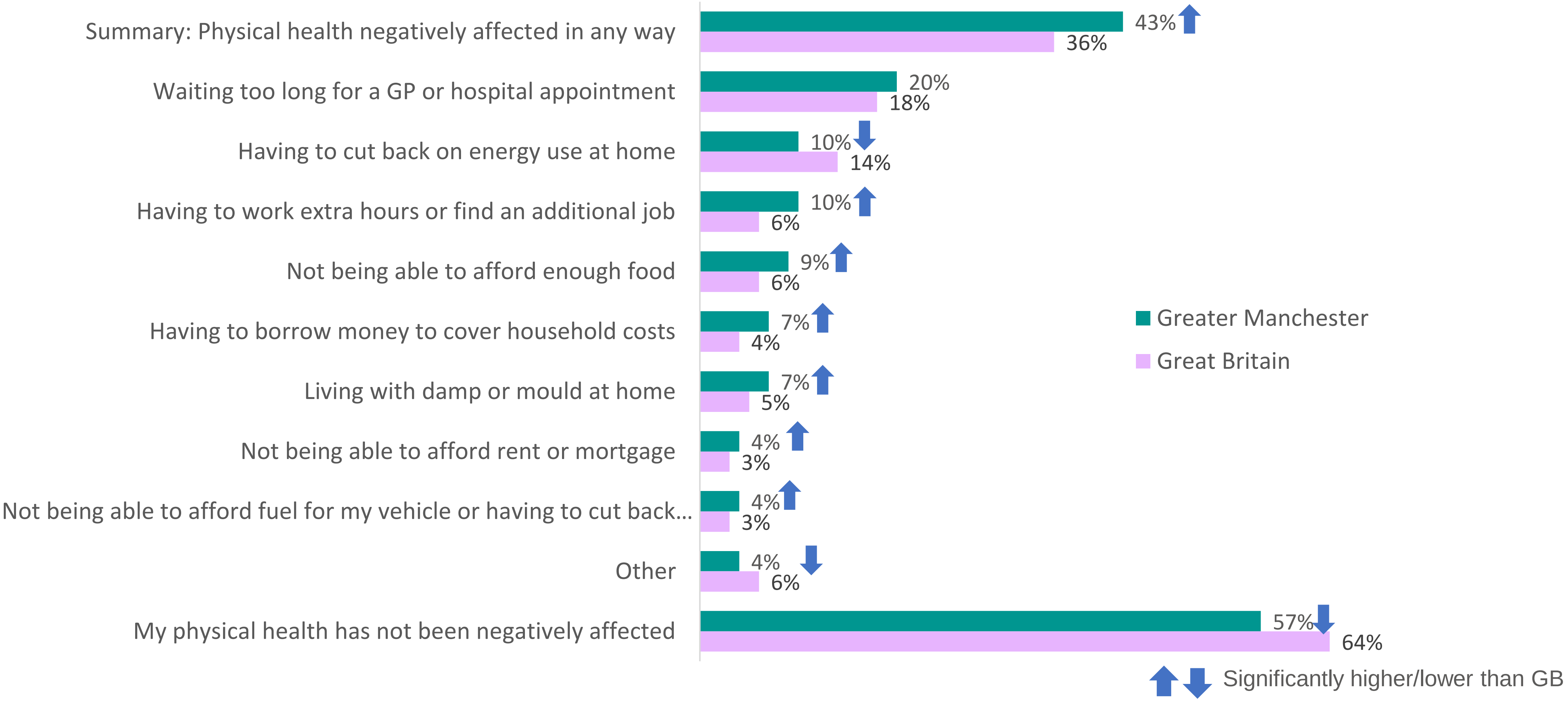
In the past month, which of these, if any, has negatively affected your mental health?



NHS2. In the past month, which of these, if any, has negatively affected your mental health?
Base: All respondents, 1,540. ONS data, based on national fieldwork 18th October – 1st January 2024

However, the same is not true for physical health. Negative impacts on physical health are felt much more keenly by GM respondents than across Britain as a whole, both overall and for most individual factors asked about.

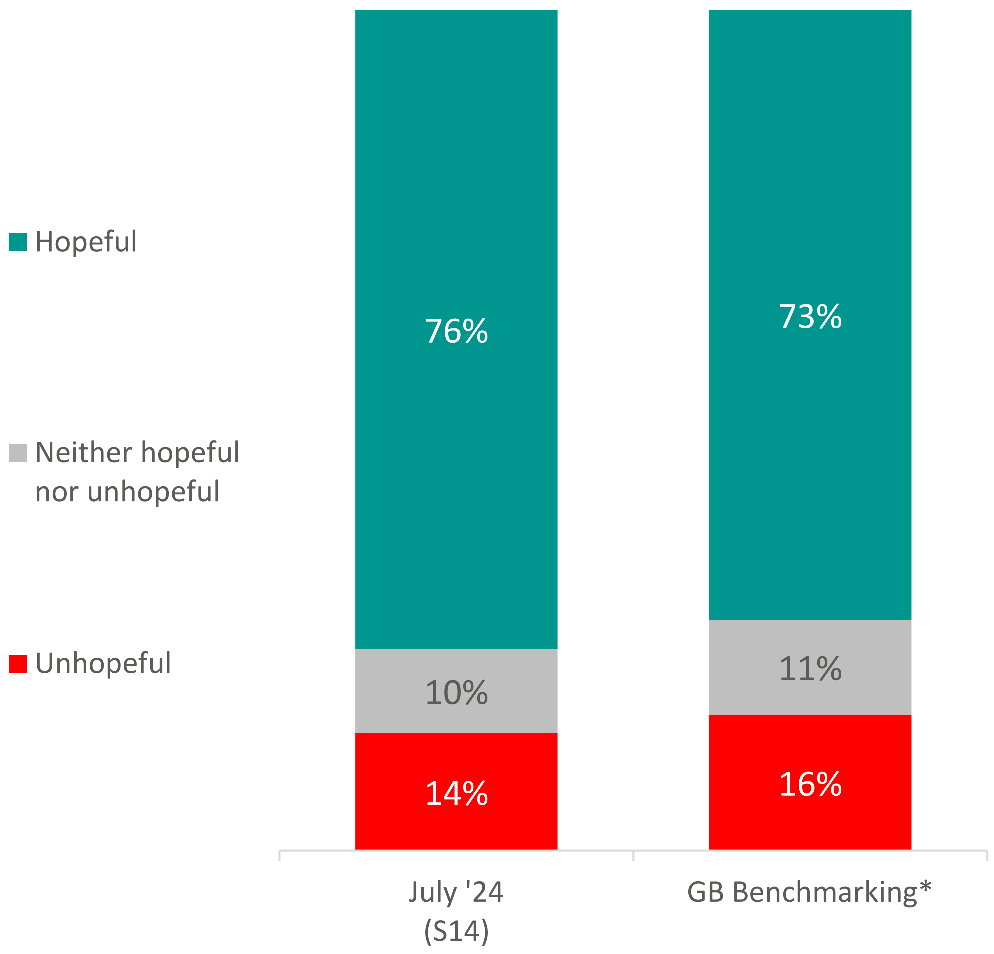
In the past month, which of these, if any, has negatively affected your physical health?



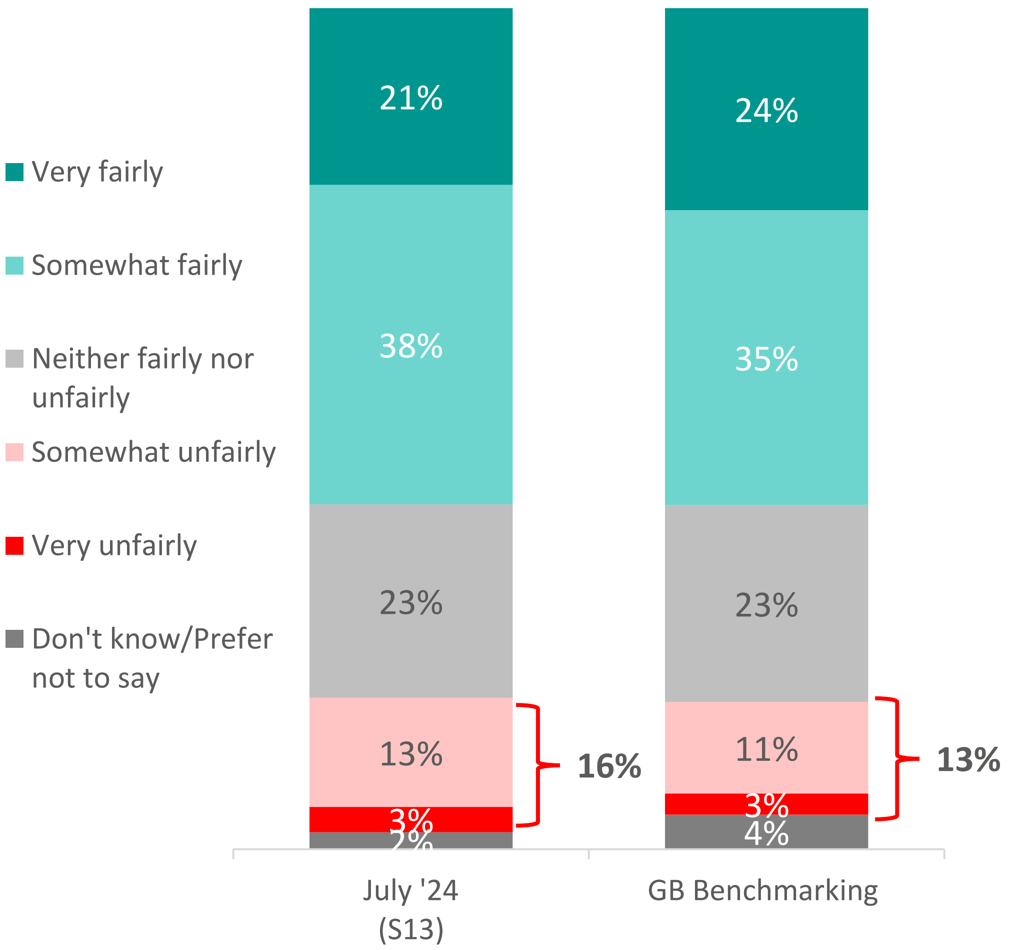
NHS3. In the past month, which of these, if any, has negatively affected your physical health?
Base: All respondents, 1,540. ONS data, based on national fieldwork 18th October – 1st January 2024

For the first time, questions on hope and fairness were asked. Three quarters (76%) of GM respondents reported feeling hopeful about their future, similar to Great Britain overall (73%). However, GM respondents were more likely to report being treated unfairly by society (16%) than GB (13%)

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: Survey 13, 1540. GB benchmarking taken from UK measures of wellbeing (fieldwork period 8 to 19 May 2024) *Figure 70% in national figures, rebased for reporting purposes here

Those more likely to feel unhopeful or treated very unfairly by society include those with long term health conditions and those with low household incomes

% with higher levels of 'low' hopefulness compared to GM average (14%)*:

Demographics:

- Those with a disability (28%) including a learning disability (28%), mental ill health (41%), or a mobility disability (29%)

Individual and/or family circumstance:

- Those with low levels of life satisfaction (61%)
- Those who do not feel that the things they do in their life are worthwhile (61%)
- Those who do not agree that they can look after their own health (49%)
- Those who feel they are treated unfairly by society (30%)
- Those earning up to £15,599 (23%)
- Those renting their home from a Housing Association / Trust (22%)
- Those with a physical or mental condition lasting longer than 12 months (22%) whose condition reduces their ability to do activities by a lot (32%) or a little (20%)
- Those living in a single person household (19%)
- Those not in employment (18%), including those not in work due to ill health or disability (35%)
- Those who have had to use more money or credit in the last month (17%)
- Those who have no religion (17%)

% who felt society treats them 'unfairly' compared to GM average (16%) is higher among*:

Demographics:

- Those with a disability (28%), including those with mental ill health (35%), or a mobility disability (26%)

Individual and/or family circumstance:

- Those who do not feel able to look after their own health (39%)
- Those who do not know enough about their own health (39%)
- Those with very low levels of hopefulness (39%)
- Those with low levels of life satisfaction (35%)
- Those who do not feel that their life is worthwhile (32%)
- Those with low levels of happiness (30%)
- Those not in work due to ill health or disability (30%)
- Those finding it difficult to afford their rent (24%)
- Those who do not feel able to save any money in the next 12 months (23%)
- Those with a physical or mental condition lasting longer than 12 months (22%), including those whose condition reduced my their ability to do activities a lot (32%) or a little (23%)
- Those with high anxiety (22%)
- Those renting their home (19%) including those

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 13, 1540

Greater Manchester's health confidence score has fallen slightly, but not significantly. While the score for 'knowledge' (knowing enough about my health') has fallen, it has increased in the 'access' measurement (feeling able to get the right help if I need it).

An overall Health Confidence Score (HCS) is calculated based on responses to four questions, each covering one of four dimensions – access, knowledge, self-management, shared decisions

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

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

Shared decision
81.3
-1.0
(since May)
'I am involved in decisions about me'

Self-management
71.2
-0.2
(since May)
'I can look after my health'

Knowledge
66.6
-1.5
(since May)
'I know enough about my health'

Access
67.4
+1.3
(since May)
'I can get the right help if I need it'

Overall Greater Manchester health confidence score (out of 100)

71.6

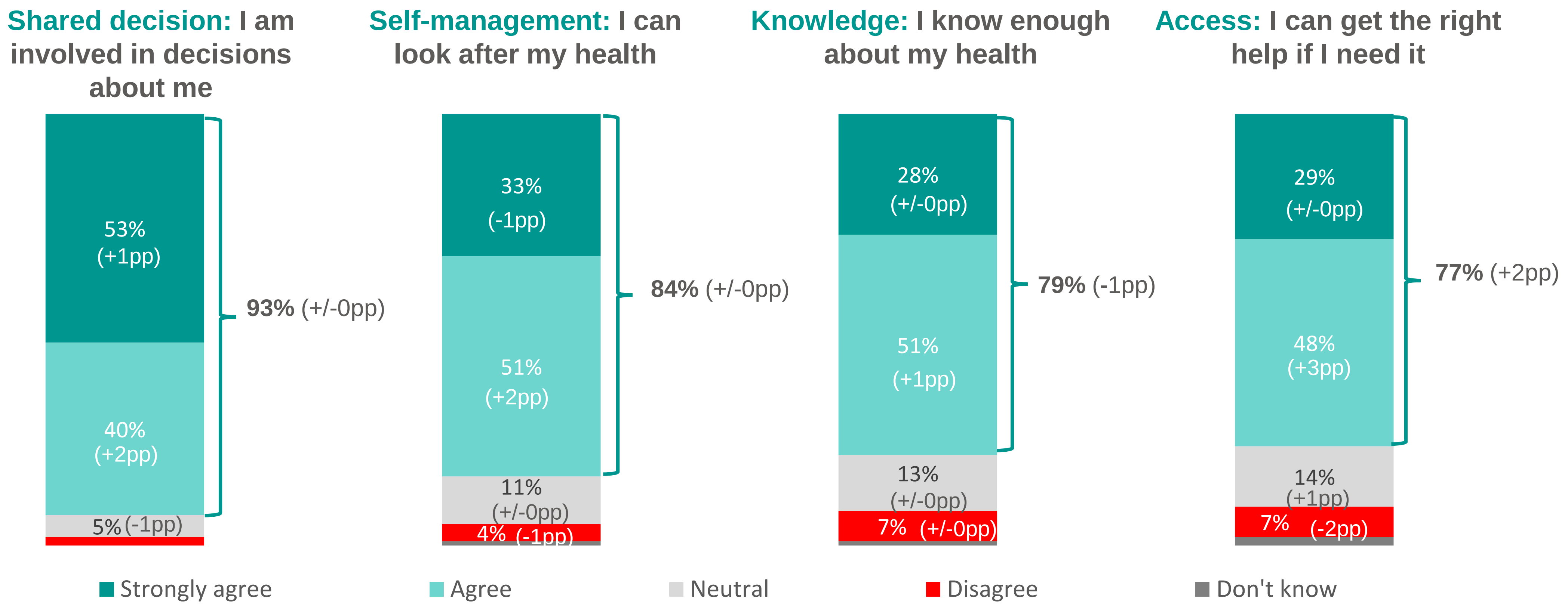
This is

-0.8

points lower than in May 2024 (72.4) but 1.1 points higher than in May 2023 (70.5) - see slide 22 for full trend over time

S14. To what extent do you agree or disagree with the following statements?
Unweighted base: All respondents Survey 13, 1,540 (Valid responses)

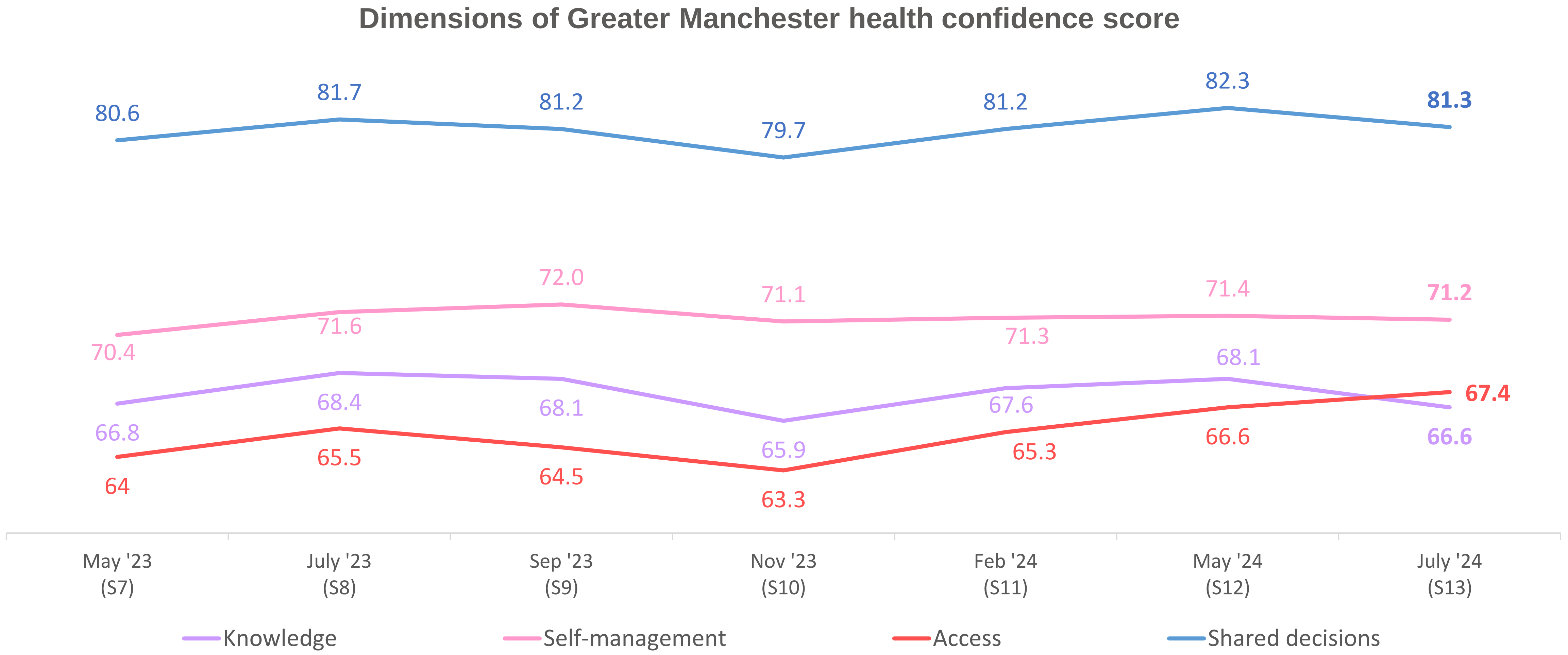
The majority of respondents continue to agree that they can manage their own health. Whilst most measures have remained stable with May, there has been a slight – but not significant – increase in those who agree they can get the right help if they need it



Figures in brackets show change since May (S12)

S14. To what extent do you agree or disagree with the following statements?
Unweighted base: All respondents Survey 13, 1540 (All responses)

After increases in May, all dimensions of Health Confidence have fallen back to levels seen in February – except for access (feeling able to get the right help if I need it), which has risen to its highest recorded value.



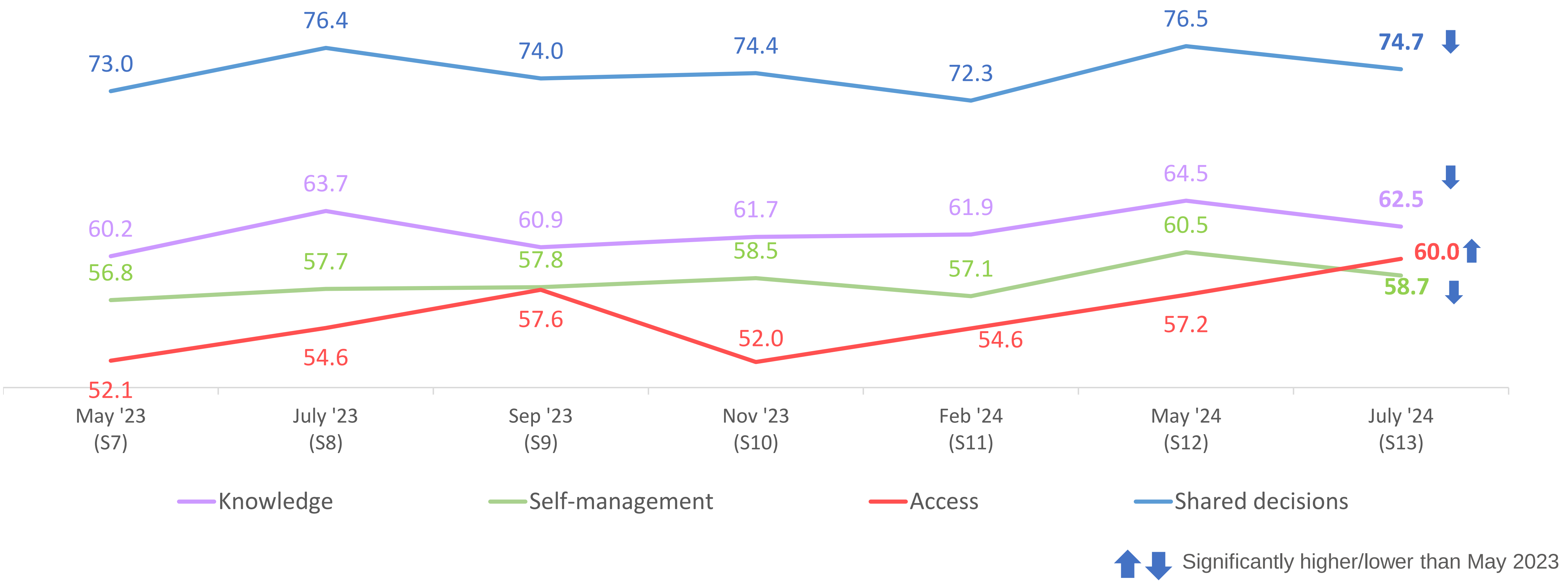
While there has been some fluctuation in health confidence score since tracking started in May 2023, no changes have been significant.

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

The trend observed among the general population can also be seen among disabled respondents with access (feeling able to get the right help if I need it) increasing significantly since May '23 – to the highest recorded level.

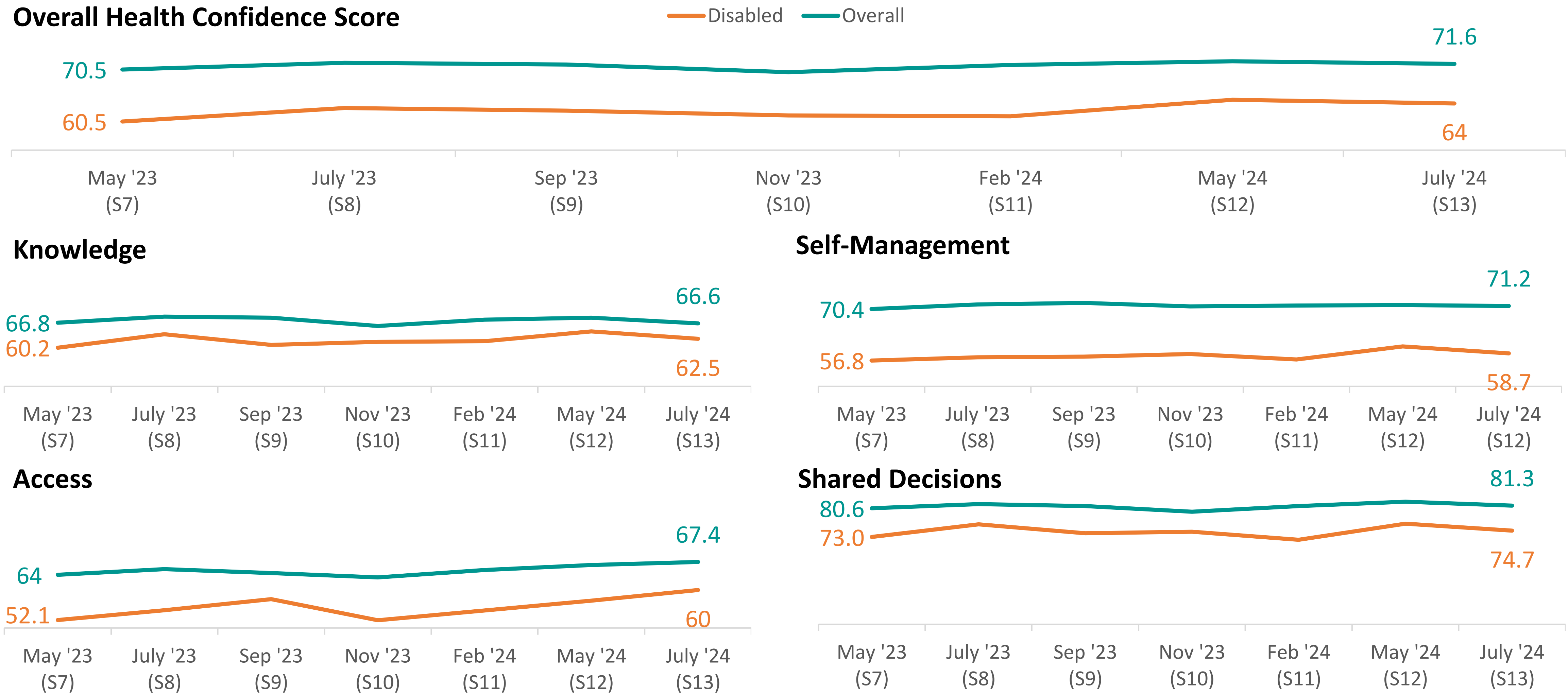
Greater Manchester health confidence score among disabled respondents (out of 100)

Health confidence ratings: High = 80-100 / Moderate = 60-79 / Low = 40-59 / Very Low = 0-39



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

The overall health confidence score remains lower for disabled respondents than for the general population, with this gap increasing since May. However, the gap between the total population and disabled respondents on 'access' (feeling able to get the right help if I need it) continues to narrow.



S14. To what extent do you agree or disagree with the following statements?
Unweighted base: Survey 12, 1551 (All responses); 394 (Disabled respondents)

Poverty proofing: access to NHS services

Poverty proofing: access to NHS services - context

This is the second survey in which ‘Poverty proofing’ has been explored, to better understand residents’ experiences of accessing NHS health and social care services. The last time these questions were asked was September 2023, so wherever possible results in this section track using this data.

Questions on this topic will potentially be revisited again at a later point in 2024/25.

These results should be used to feed into broader conversations in conjunction with other datasets and engagement activity that is underway elsewhere in Greater Manchester.

Poverty proofing: access to NHS services – key findings

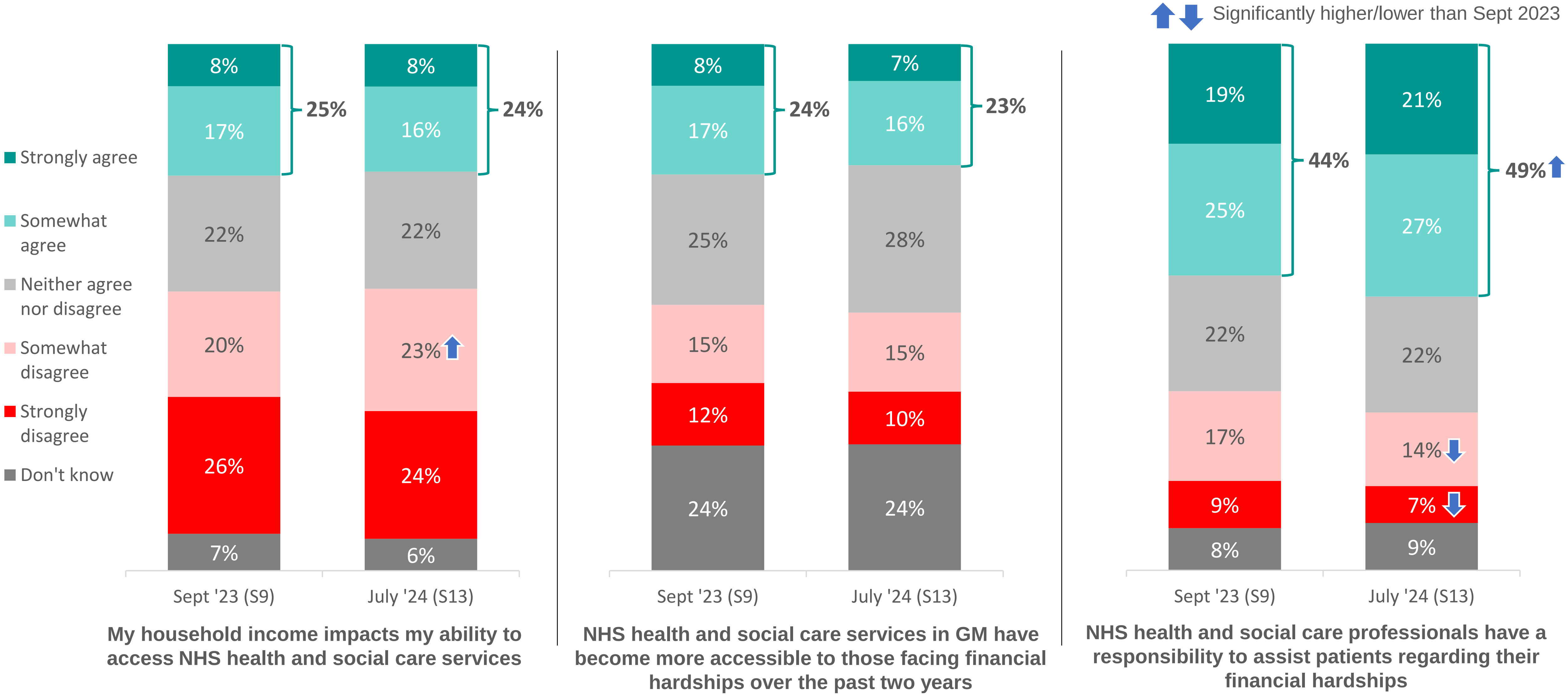
ACCESSING NHS SERVICES

- A quarter of respondents still believe their household income impacts their ability to access NHS health and social care services (24%, was 25% in September 2023)
- A similar proportion still feel that NHS services in Greater Manchester have become more accessible to those facing financial hardships in the last two years (23%, was 24% in September 2023). But significantly more agreed this time around that NHS professionals have a responsibility to assist patients regarding their financial hardships (49%, was 44% in September 2023)
- Parents of young children, renters and the financially vulnerable are generally more likely to agree on all three of these statements.
- Just over 1 in 10 (13%) say they have been unable to access NHS services in the last month due to a cost implication. This increases to 1 in 5 (20%) saying this has been the case in the last year. The most common reasons for being unable to access services are loss of earnings (30%), cost of parking (29%) and costs after the appointment (28%).

AWARENESS OF NHS ASSITANCE

- Seven in ten (72%) are aware of at least one NHS scheme or form of assistance – this is higher among disabled respondents (80%) and those with caring responsibilities (80%) among others.
- People with a first language other than English, those from within racially minoritised communities and younger age groups are more likely to be unaware of all such support schemes available.
- Awareness is highest for free prescriptions or help with those costs (known by 61% of respondents). Around a third are aware of free or affordable dentistry (38%) or free or discounted stop smoking services (32%). Only a fifth (19%) are aware of funded transport vouchers.

Significantly more residents now believe NHS staff have a responsibility to assist those with financial issues than in Sept 2023. A quarter feel their income impacts their ability to access NHS services; the same share say that these services have become more accessible to the financially vulnerable over the last two years.



P1. To what extent do you agree or disagree with the following statements?
Base: Survey 13, 1540; Survey 9, 1560

Those from within racialised communities and parents, especially of young children, are more likely to agree on poverty proofing statements

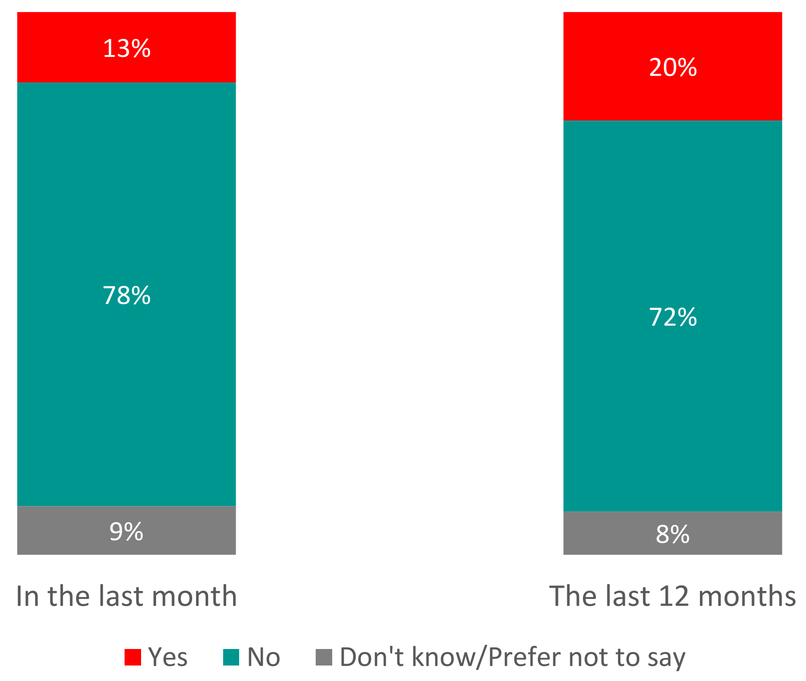
% who agree their income impacts their ability to access NHS services compared to the GM average (24%), are higher among:	% who agree NHS services have become more accessible to financially vulnerable compared to the GM average (23%), are higher among:	% who agree NHS staff have a responsibility to help patients with financial hardships compared to the GM average (49%), are higher among:
Demographics: • Black or black British respondents (51%) • Those with children under the age of 5 (37%) • Non-native speakers (37%) • Those with caring responsibilities (37%) • Those in part-time employment (37%) • Those aged between 25-34 (35%) • Those who have a condition that limits their activities by a lot (34%) **Individual and/or family circumstance:** • Those who have paid for a care package for themselves (61%) or for a family member (45%) • Those who have not eaten all day for lack of money (42%), or cut the size / skipped a meal (37%) • Those earning below the Real Living Wage (39%) • Those who find it difficult to pay their rent (36%) • Those renting from local authorities or councils (35%), or rent privately (34%)	**Demographics:** • Those from within racialised communities (40%), including Black or Black British respondents (46%) or Asian or Asian British respondents (39%) • Bisexual respondents (40%) • Those with children under the age of 5 (36%) • Non-native speakers (36%) • Those aged between 25-34 (34%); or 18-24 (32%) **Individual and/or family circumstance:** • Those who have paid for a care package for themselves (62%) or for a family member (44%) • Those who have not eaten all day for lack of money (38%), or cut the size / skipped a meal (32%) • Those renting from local authorities or councils (33%) • Those with high levels of hopefulness (33%) • Those who have volunteered in the last year (32%) • Those who have had a negative impact on their physical health (31%)	**Demographics:** • Those with children at university (69%), or children aged 5-15-years-old (55%) • Bisexual respondents (68%) • Those with caring responsibilities (65%) • Those from within racialised communities (60%) • Respondents in Wigan (59%) **Individual and/or family circumstance:** • Those who have paid for a care package for themselves (78%) • Those who have volunteered in the last year (58%); or been involved in groups or clubs in the last year (52%) • Those who have the ability to save money in the next year (52%)

* Subgroup analysis uses data from S13

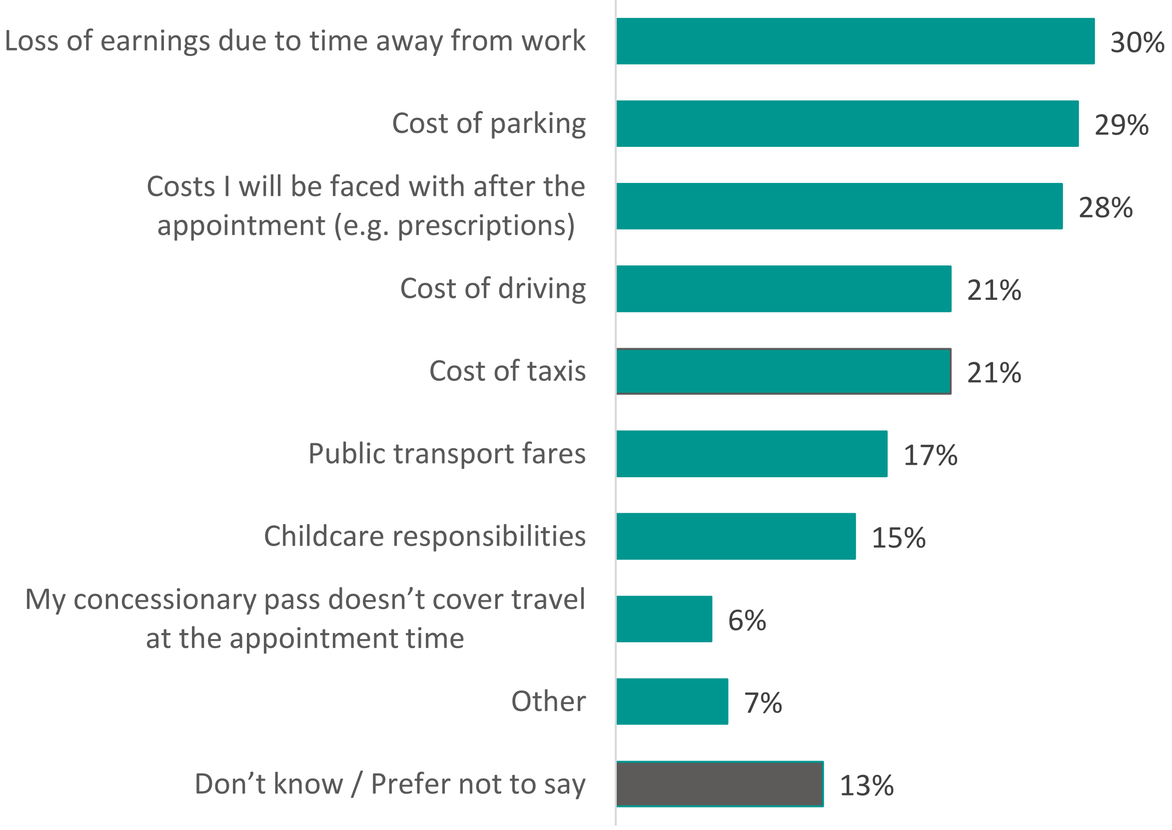
P1. To what extent do you agree or disagree with the following statements?
Base: Survey 13, 1540

More than 1 in 10 (13%) Greater Manchester respondents say cost implications have stopped them accessing NHS services in the past month. This rises to 1 in 5 (20%) saying this has occurred in the last year. Loss of earnings, parking costs and follow-on costs are the most common barriers

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



Among those who have been unable, which of the following cost implications explains your reason for not accessing an NHS service (n=368)



NHS4. Have you found [stated situation] has been an issue for you in...? QNHS5. Which of the following cost implications best describes your reason for not accessing an NHS health and/or social care service? Base: All respondents, 1,540; All who have been unable to access NHS services due to cost implications, 368

Almost three quarters (72%) are aware of at least one NHS scheme – mainly free prescriptions of help with those costs. Those from within racialised communities and younger age groups are more likely to say they are unaware of any

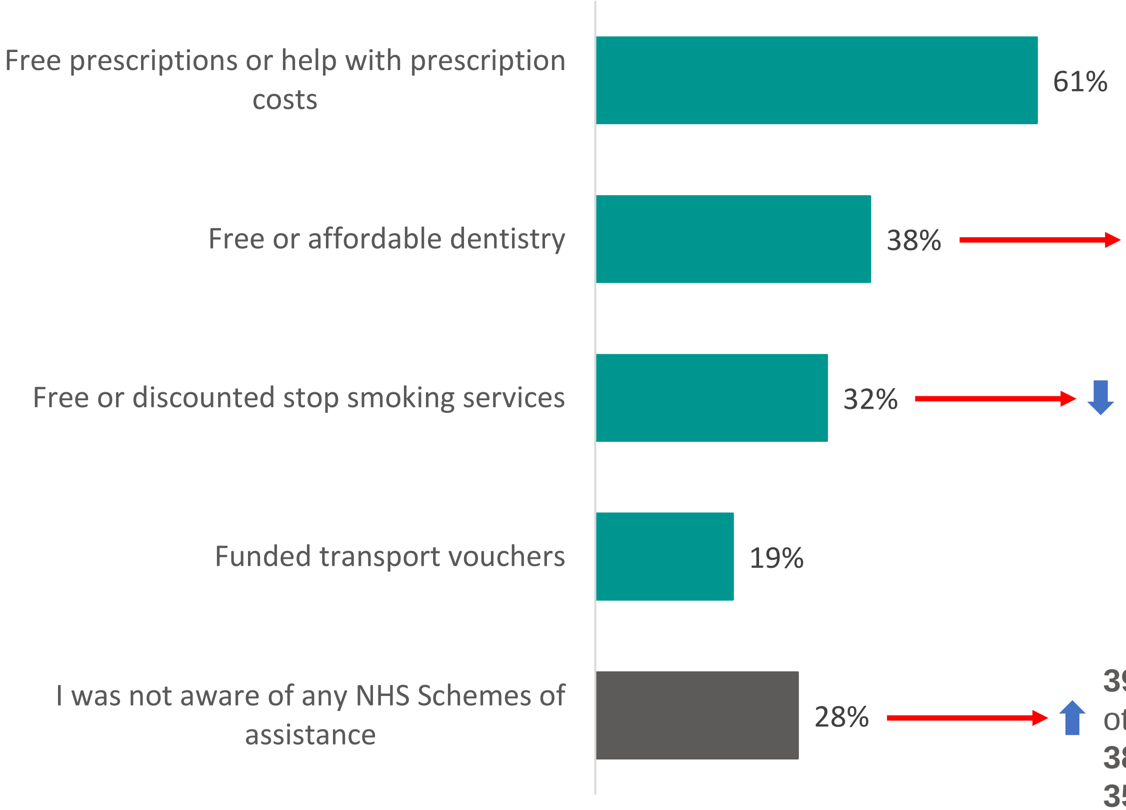
72%

are aware of at least one scheme

This is significantly higher among:

80% Disabled residents
80% Those with caring responsibilities
79% 55-64-year-olds
75% Those earning above the Real Living Wage

Before today, which of these NHS schemes or assistance were you aware of?



Free prescriptions (61%) ⬇:
48% Racially minoritised groups
47% Those living in Rochdale
46% 16-24 year olds
44% People with first language other than English

Free or affordable dentistry (38%) ⬇:
26% People with first language other than English

Free or discounted stop smoking services (32%) ⬇:
22% 16-24 year olds
19% People with first language other than English
18% Racially minoritised groups

Not aware of any (28%) ⬆:
39% People with first language other than English
38% 16-24yos
35% Racially minoritised groups

⬆⬇ Significantly higher/lower than GM average

P7. The following are NHS schemes or assistance that Greater Manchester residents may be able to access to get support with health and social care costs. Before today, which of these were you aware of? Base: 1,540 (All respondents)

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 explore how this kind of data may be able to inform local monitoring and evaluation of programmes aiming to increase pride in place and life chances (including those funded through local growth funds such as the UK Shared Prosperity Fund) - as one part of a wider approach.

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 11, 12 and 13.

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

Please note, fieldwork for this wave took place before the recent incidents of unrest and disorder across England.

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

Your local area – key findings (1 of 2)

OVERALL SATISFACTION WITH LOCAL AREA

- Overall satisfaction with respondents' local areas as a place to live has decreased since May (was 76%, now 74%), bringing satisfaction in line with the England benchmark of 74%.
- Almost 4 in 5 (78%) respondents would recommend their local area as a place to live. This has remained in line with May 2024

SATISFACTION WITH LOCAL AREA - SERVICES AND AMENITIES

Respondents' satisfaction with a range of services and amenities in their local area has decreased across several areas since May 2024:

  - There has been a slight decrease in respondents' satisfaction with parks and other green spaces (74%, was 76% in May).
  - There has been a decrease in satisfaction with local services and amenities (63%, was 67% in May)
  - There has been a decrease in those agreeing that their local area is well maintained (56%, was 62% in May – the highest level since reporting began). However, this decrease brings this result back in line with that from February (55%)
  - Satisfaction with health and care services has decreased since May (58%, was 62%)
  - Satisfaction with cultural facilities has decreased significantly since May (40%, was 46%). The proportion of respondents satisfied with opportunities to take part in cultural events and activities has, however, remained largely in line (56%, was 57% in May)

- 64% are satisfied with the availability of public transport – in line with levels reported in May (63%).
  - When examining individual modes of transport there is also consistency with May figures – for example, in those satisfied with bus services (59%, was 58% in May) and train services (47%, was 46% in May)
  - However, there has been a significant decrease in satisfaction with the condition of paved/pedestrian areas (41%, was 47% in May).

Your local area – key findings (2 of 2)

NEIGHBOURHOOD AND COMMUNITY*

- Despite civil unrest across England in the weeks following fieldwork, the results do not suggest any notable increase in community tension prior to this. Since May, there is only a minor change in the proportion of respondents who agree that their local area is a place where people from different backgrounds get on well (77%, was 79% in May), and no change in the proportion agreeing that people look out for each other (72%, no change since May)
- Similarly, there is no significant change in the proportion who say they feel proud of their local area (69%, was 71% in May)

INVOLVEMENT IN GROUPS, CLUBS OR ORGANISATIONS

This survey, for the first time, asked respondents whether they had been involved in a group, club, organisation in the last 12 months

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

VOLUNTEERING

- A third (30%) of respondents continue to have volunteered in the last year.
- Volunteering is more frequent amongst a range of demographics (e.g. younger respondents aged 16-24; parents; those living in households with 4+ people)

*Please note that the fieldwork for this survey took place prior to the widespread civil unrest across the UK in late July/early August 2024

Three quarters of respondents are satisfied with their local area as a place to live. This is a slight decrease since May but in line with the England average and similar to what was seen this time last year (July 2023)

% with 'low' satisfaction of local area compared to Surveys 11-13 GM average (13%)*:

Demographics:

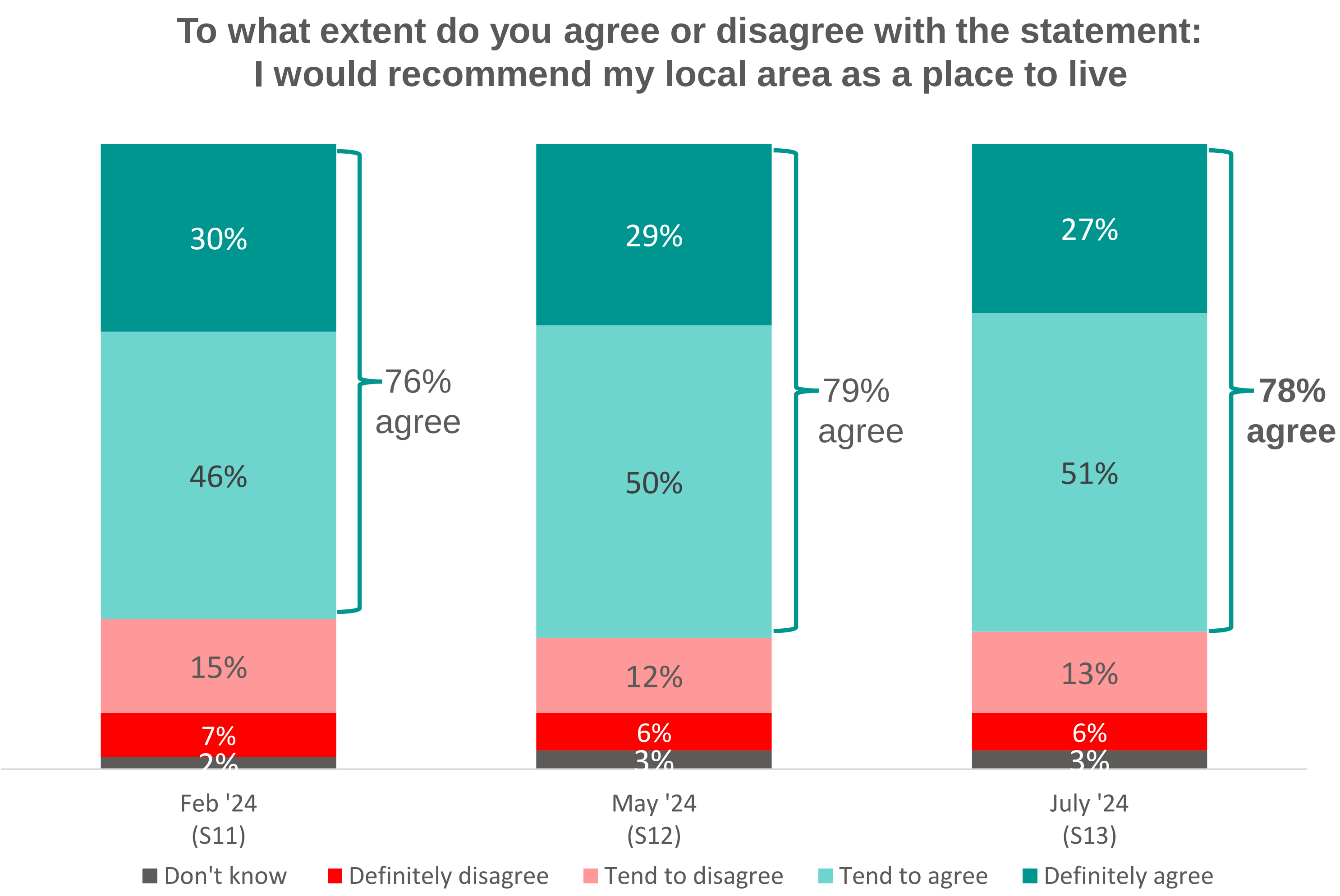
- Those with a disability (21%) including those with mental ill health (24%), a mobility disability (20%), or other disability (22%)
- Female respondents (15%)

Individual and/or family circumstance:

- Those who would not recommend their local area as a place to live (56%)
- Those who disagree that people in their local area look out for each other (31%)
- Those with low levels of life satisfaction (31%)
- Those not in work due to ill health or disability (29%)
- Those with low levels of happiness (28%)
- Those aged 65+ and who are deprived (22%)
- Those who have a physical or mental health condition lasting longer than 12 months (18%)
- Those who currently have caring responsibilities (18%)
- Those renting their home (16%) specifically those renting from Local Authority / Council (19%) or a Housing Association / Trust (21%)

LA2. Overall, how satisfied or dissatisfied are you with your local area as a place to live? *Relates to the 10% of respondents who said they are fairly dissatisfied with their local area, and the further 6% who said they are very dissatisfied. Unweighted base: Greater Manchester Residents Survey 7: 1488, Survey 8: 1612, Survey 9: 1560, Survey 10: 1546, Survey 11: 1460, Survey 12: 1551; Survey 13, 1540

4 in 5 (79%) would recommend their local area as a place to live – in line with the increase seen in May. Those more likely to be dissatisfied include respondents with a disability and those who feel there is a lack of social cohesion in their local area



% who would not recommend their area as a place to live compared to S11-13 GM average (20%)*:

Demographics:

- Respondents with a disability (30%) including those with mental ill health (35%), a mobility disability (26%) or other disability (30%)
- Respondents who are not heterosexual (25%)

Individual and/or family circumstance:

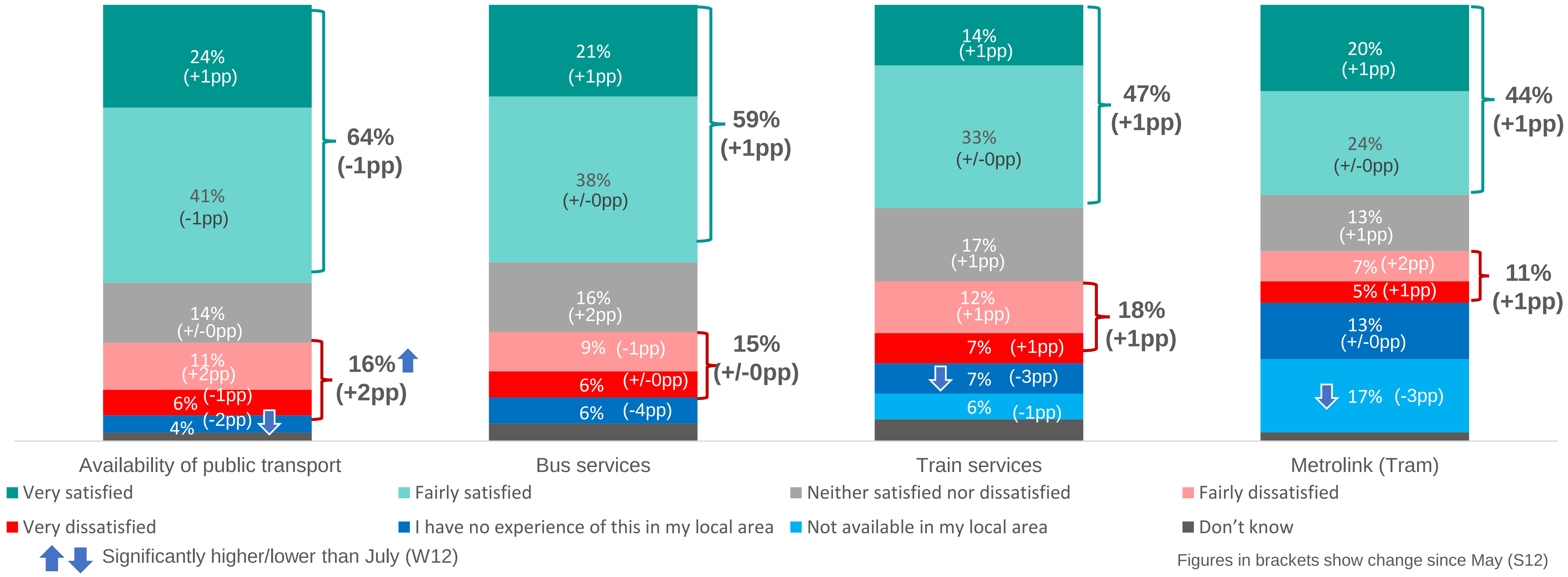
- Those who do not agree that people from different backgrounds get on well together (52%)
- Those who do not feel the things they do in their life are worthwhile (39%)
- Those who do not agree that they are able to look after their own health (39%)
- Those not in work due to ill health or disability (35%)
- Those renting their home (26%) specifically those renting from a Local Authority / Council (28%), or a Housing Association / Trust (31%)
- Those finding it difficult to afford energy costs (27%) or their ren (30%)
- Those earning up to £15,599 (26%)
- Those who do not have the ability to save any money in the next 12 months (25%)

*subgroup analysis using data from S11+12+13

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

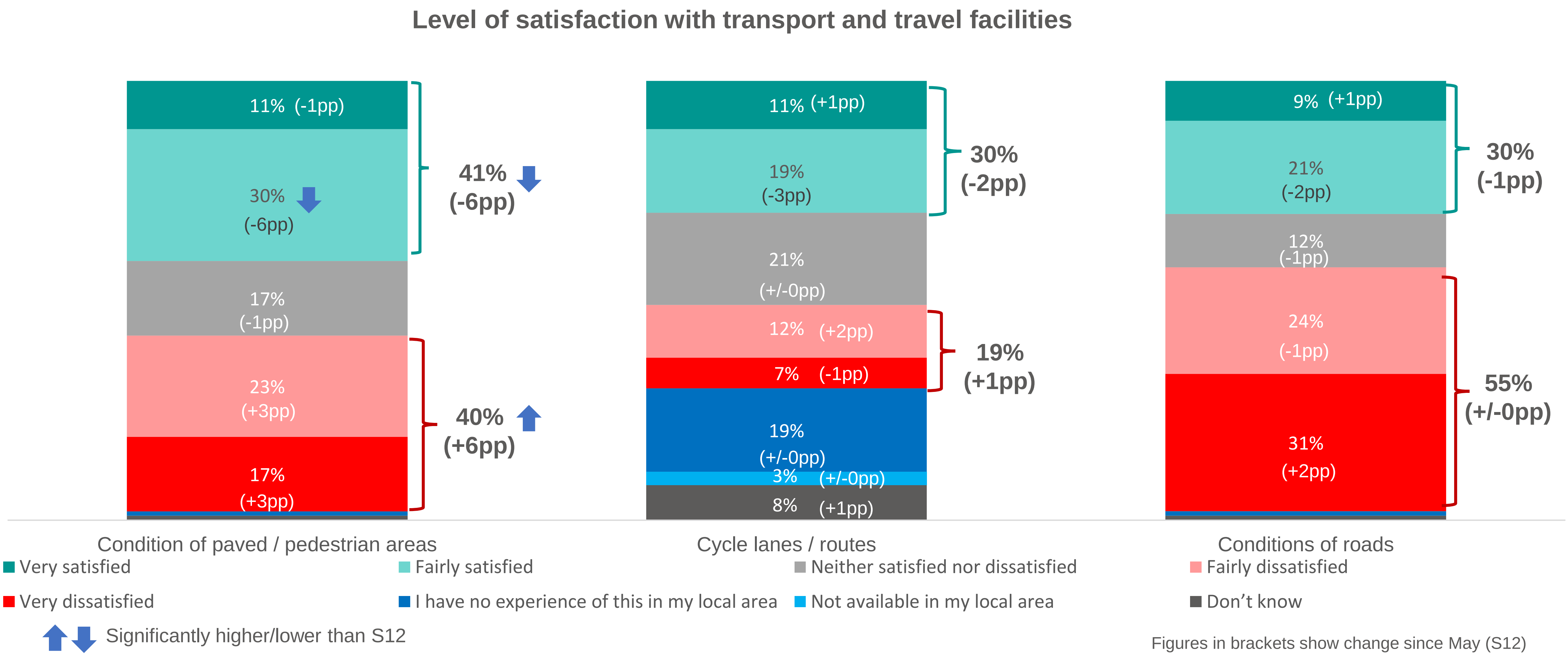
Respondents continue to be greatly more satisfied than not with transport and travel facilities. Since May those who are satisfied with the availability of public transport, bus and train services has largely remained consistent, with only a small increase in those dissatisfied with the availability of transport

Level of satisfaction with transport and travel facilities



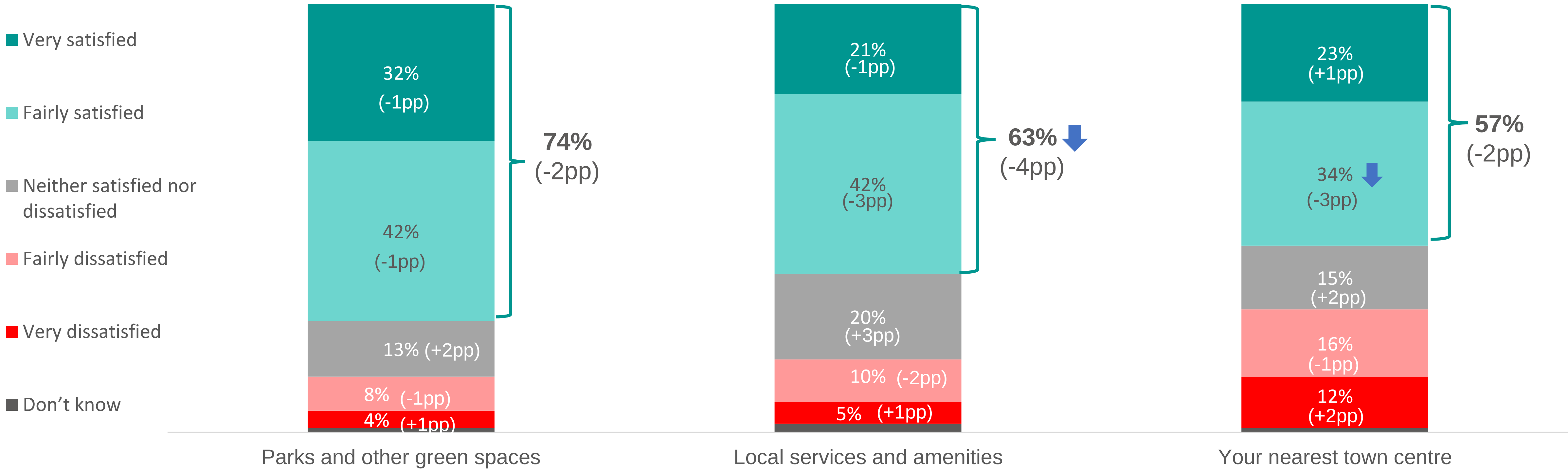
LA7. Thinking about where you live, how satisfied or dissatisfied are you with your experience of the following in your local area?
Unweighted base: All respondents Survey 13, 1540

Dissatisfaction with the condition of paved / pedestrian areas has increased significantly since May (40% from 34%), while the majority of respondents are still dissatisfied with the conditions of roads (55%)



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

Respondents are significantly less likely to be satisfied with local services and amenities and slightly less likely to be satisfied with parks and other green spaces, and their nearest town centres than they were in May

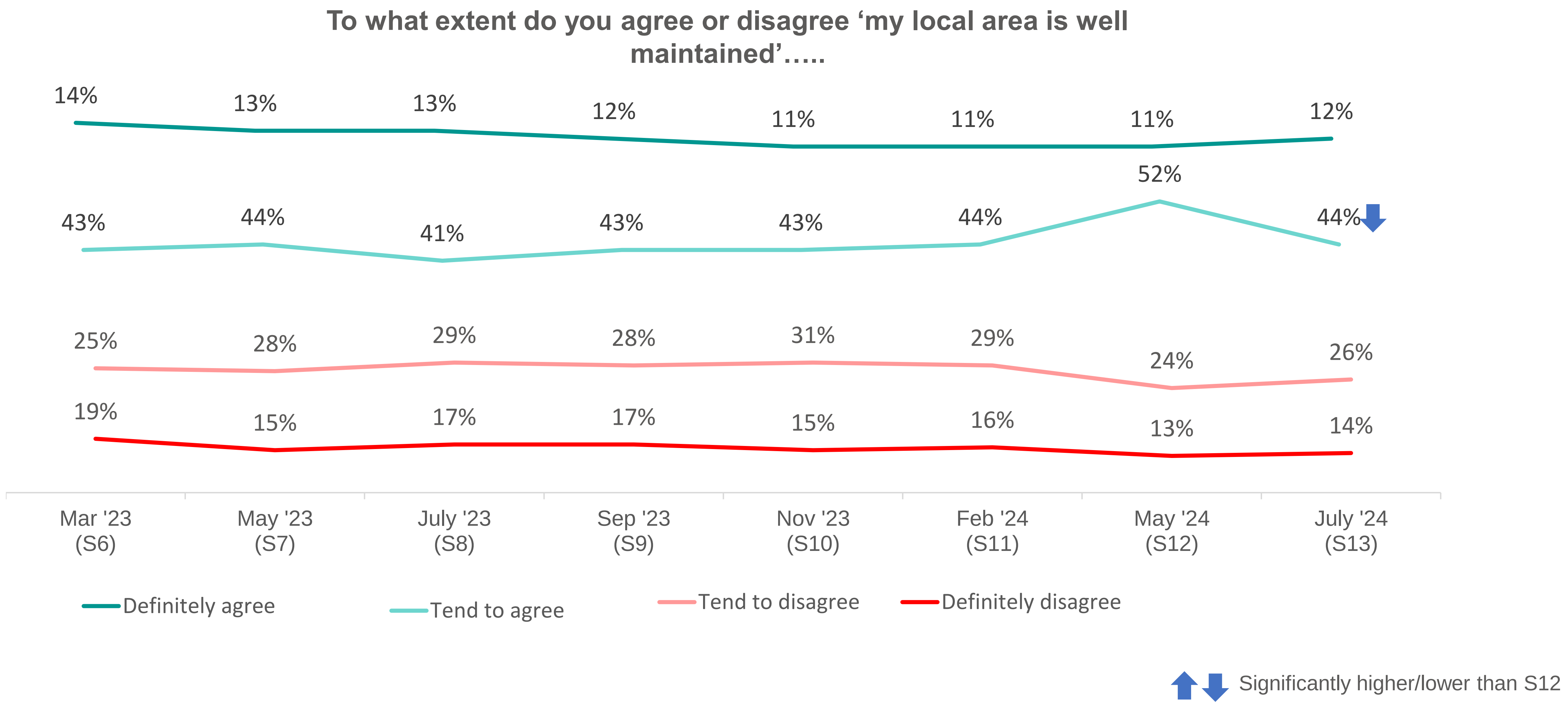


Figures in brackets show change since May (S12)

Significantly higher/lower than May (S12)

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

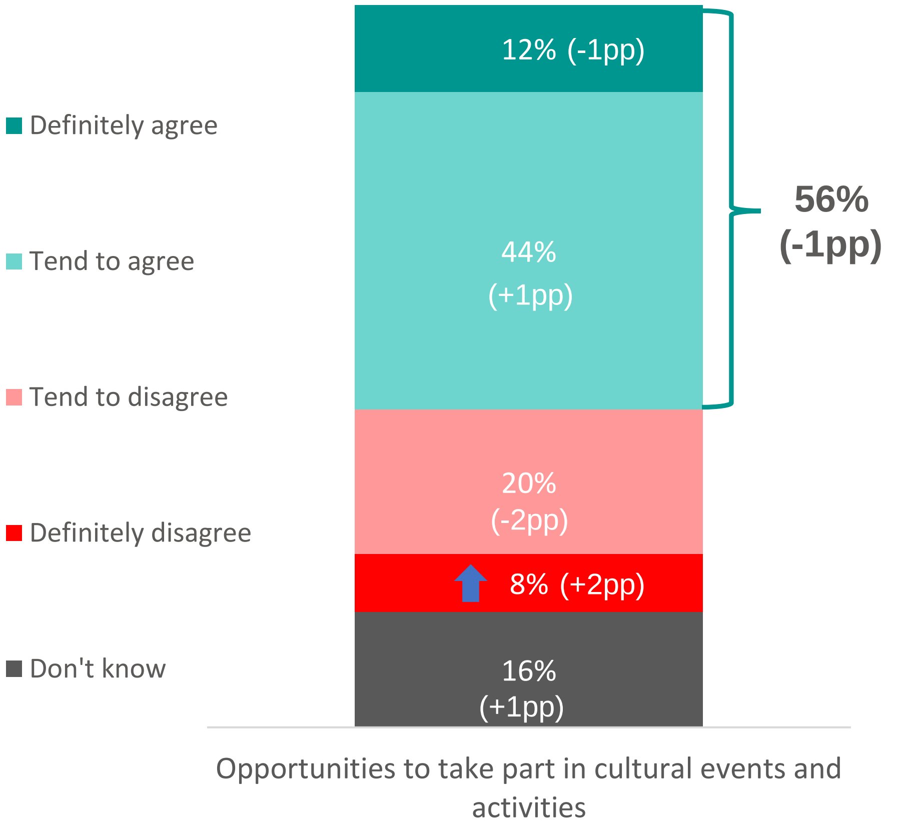
The proportion who agree that their local area is well maintained has decreased from the previous wave, with 56% agreeing. Though this fall is significant, it brings this measure back in line with February data following a sharp increase in May



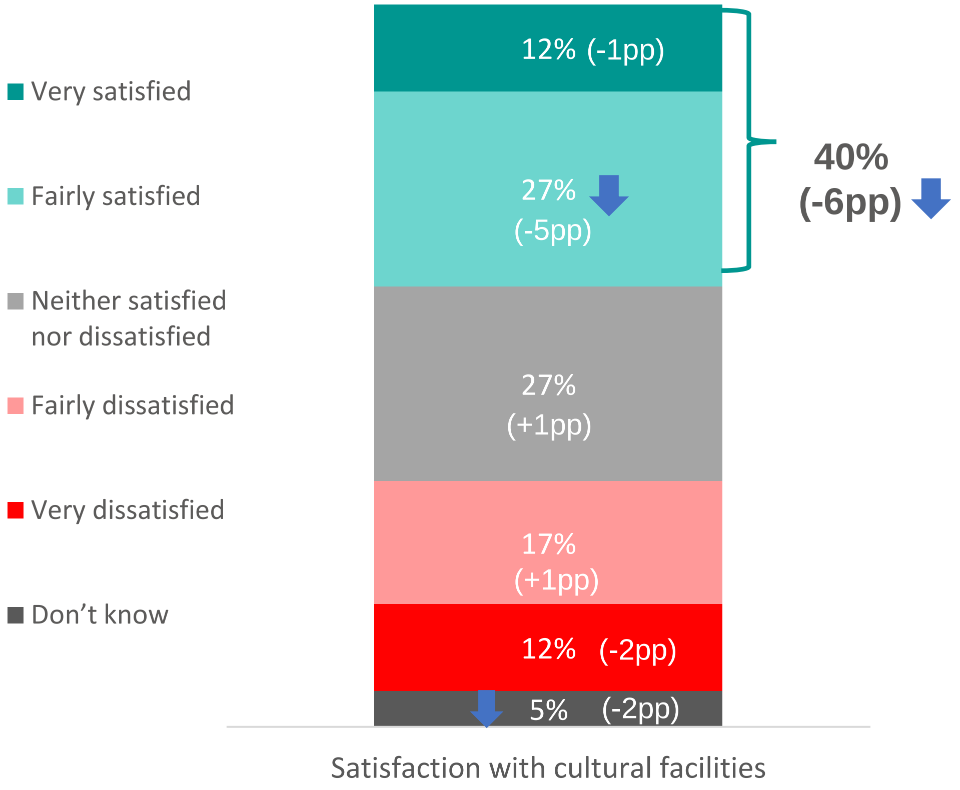
LA6. To what extent do you agree or disagree with the following statements about your local area? Unweighted base: Survey 13, 1540 (All responses) Only valid responses shown *The codes 'There are too few people in the local area' and 'People in this area are all of the same background' have been removed from this chart for visual purposes, meaning chart doesn't add up to 100%

Just over half agree there are opportunities to take part in cultural events and activities in their local area. But only 4 in 10 (40%) are satisfied with cultural facilities available, such as museums, theatres and events – a significant decrease since May

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



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

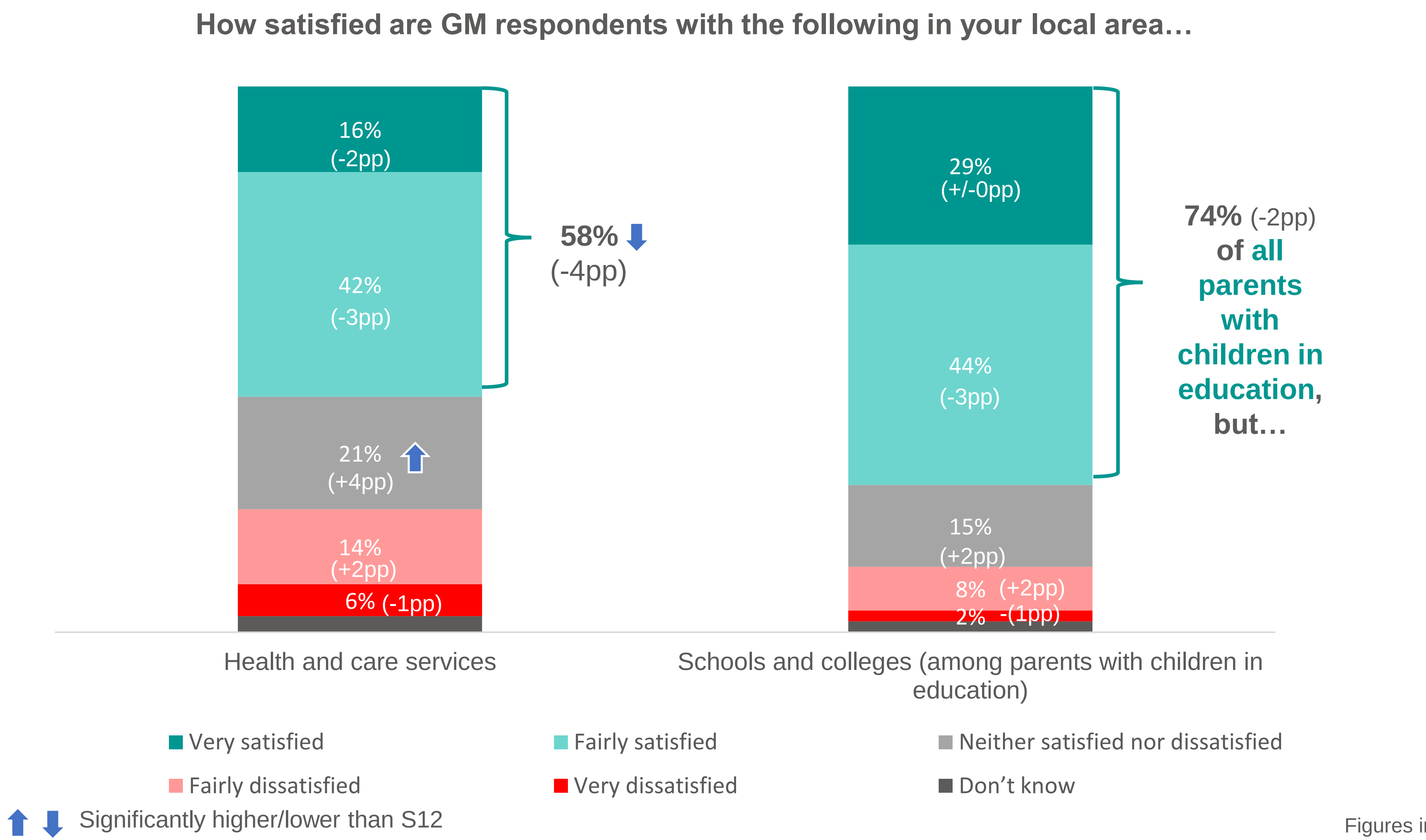


Figures in brackets show change since May (S12)

Significantly higher/lower than S12

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 Survey 13: 1540

There have been declines in the proportions of respondents satisfied with local health and care services, and schools and colleges. Satisfaction of parents with children in college has increased by 11 percentage points, bringing the proportion back in line with parents of those at other stages of education



74% (-1pp) among parents of children in **Early Years**

77% (-6pp) among parents of children in **Primary School**

74% (-4pp) among parents of children in **Secondary School**

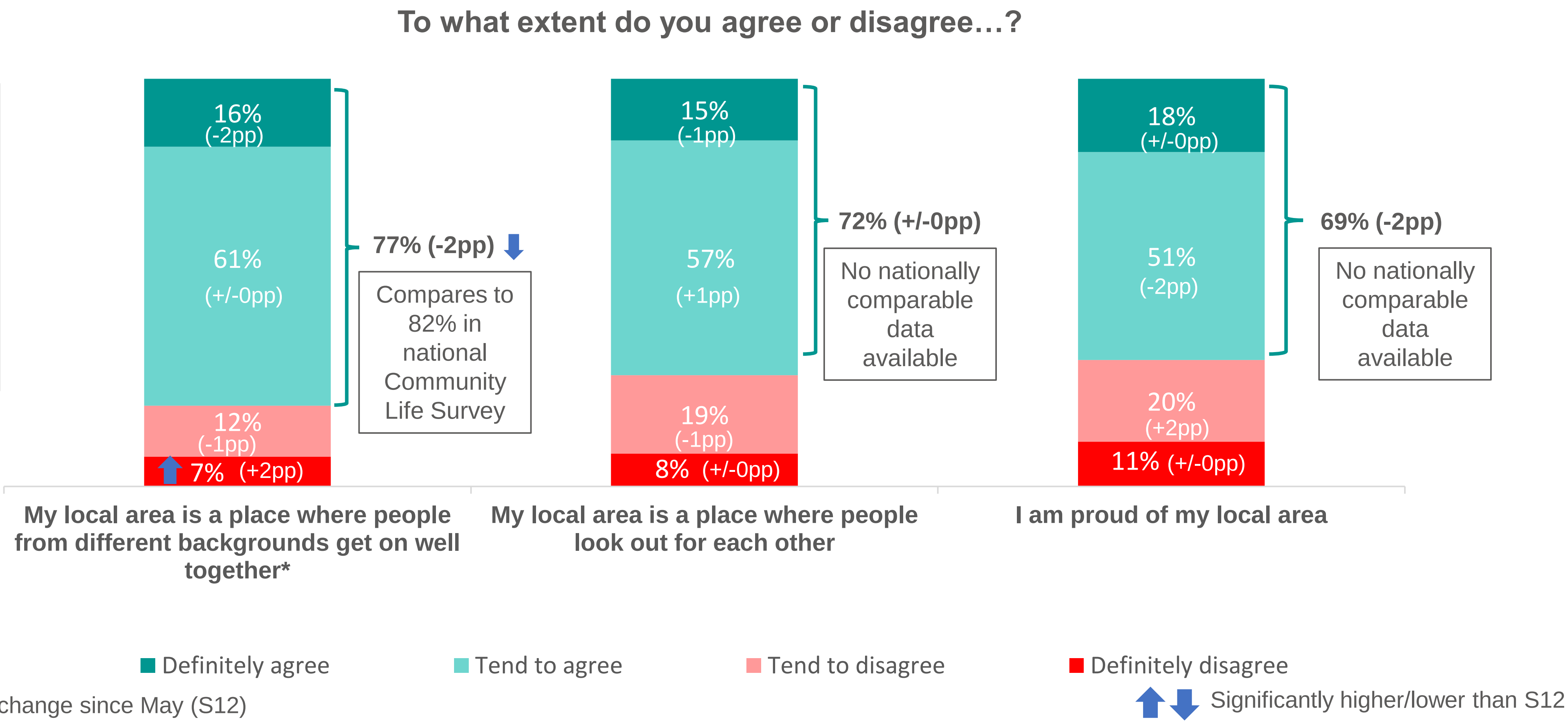
74% (+11pp) among parents of children in **College**

Figures in brackets show change since May (S12)

LA4. Generally, how satisfied or dissatisfied are you with health and care services / Schools and colleges in your local area? New codes shown only
Unweighted base: Survey 12, 1551 (All respondents); Summary: Parents of children in education, 504; Parents with children at…Early years: 113, primary school: 250, children at secondary school: 222, at college: 85

Despite the country-wide unrest in the week following fieldwork, there has been no notable recent change in proportions of survey respondents who disagree that their local area is a place where people look out for each other, or a place where people from different backgrounds get on well together

*The codes ‘There are too few people in the local area’ and ‘People in this area are all of the same background’ have been removed from this chart for visual purposes and to ensure benchmarking against DCMS figures

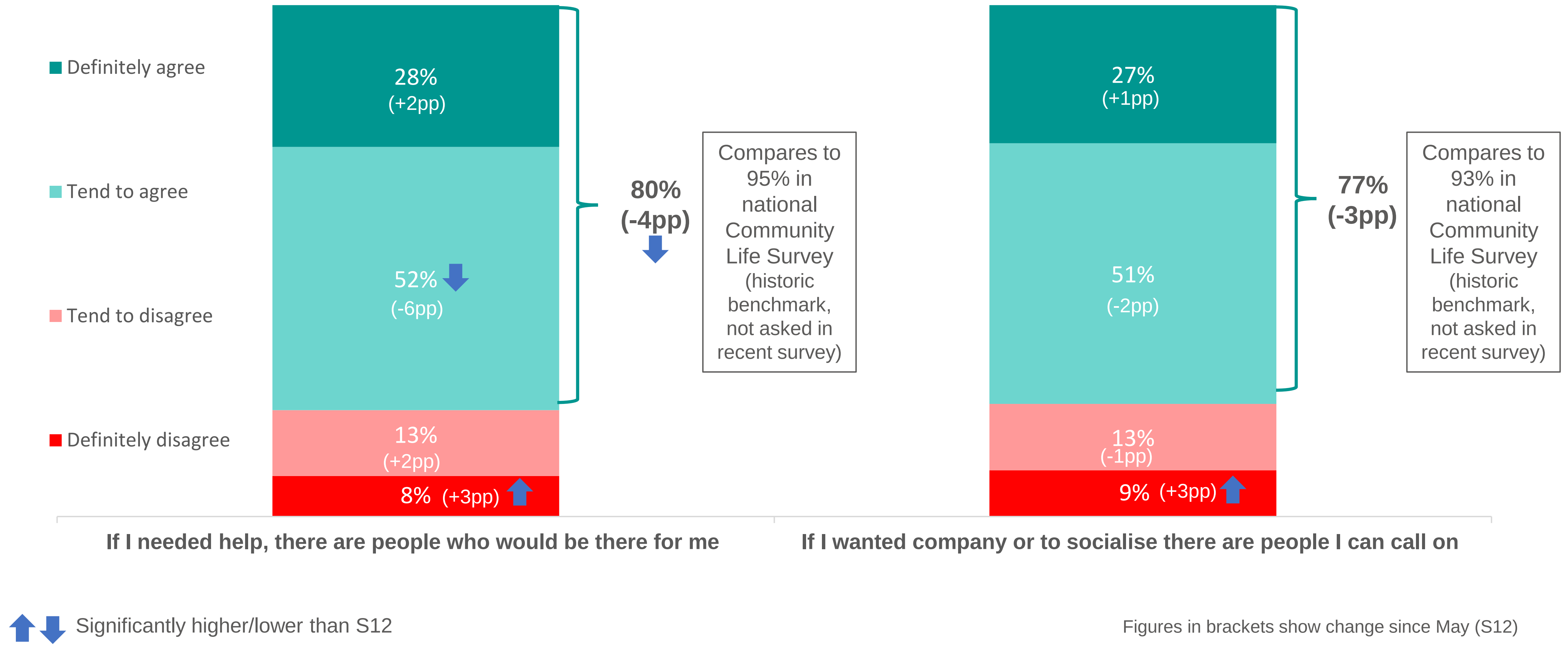


Figures in brackets show change since May (S12)

LA6. To what extent do you agree or disagree with the following statements about your local area? Unweighted base: Survey 13, 1540 (All responses) Only valid responses shown *The codes ‘There are too few people in the local area’ and ‘People in this area are all of the same background’ have been removed from this chart for visual purposes, meaning chart doesn’t add up to 100%

Despite a significant decline since May, there remain high levels of agreement from respondents that there are other people who would be there for them if they needed help. A similar proportion – around 4 in 5 – agree that if they wanted company or to socialise there are people they can call on

To what extent do you agree or disagree…?



LA6. To what extent do you agree or disagree with the following statements about your local area? Unweighted base: All respondents Survey 13: 1540 (Valid responses) Only valid responses shown excl. DK/NA. The codes 'There are too few people in the local area' and 'People in this area are all of the same background' have been removed from this chart for visual purposes, meaning chart doesn't add up to 100% *DCMS Community Life Survey uses an online, self-completion method, along with a paper survey approach

Over half (53%) have been involved in a type of group, club or organisation in the past 12 months, slightly lower than the England average (56%). In Greater Manchester, this is most frequently related to sport, hobbies or religion

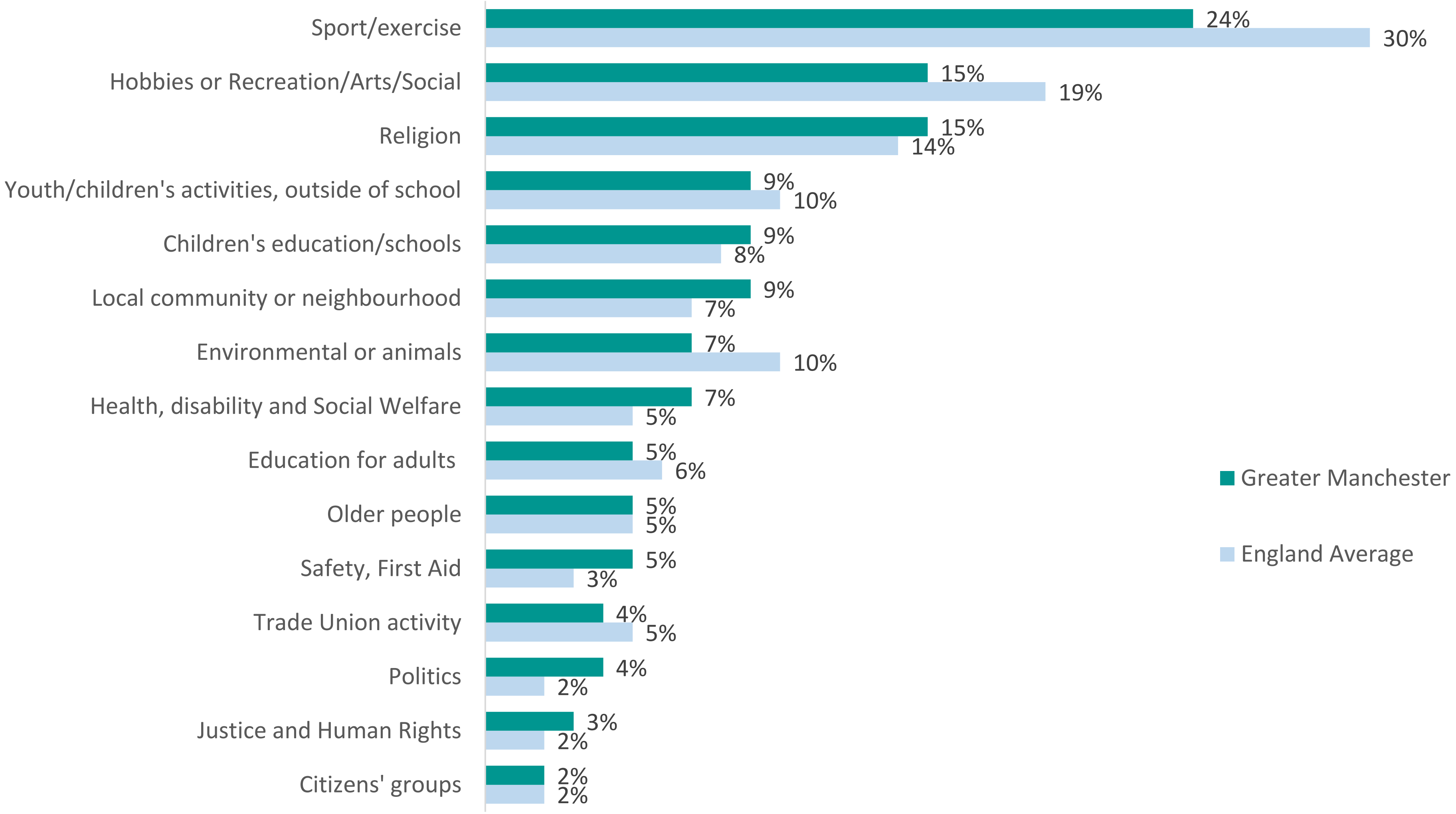
53%

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

56%

in **England**

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

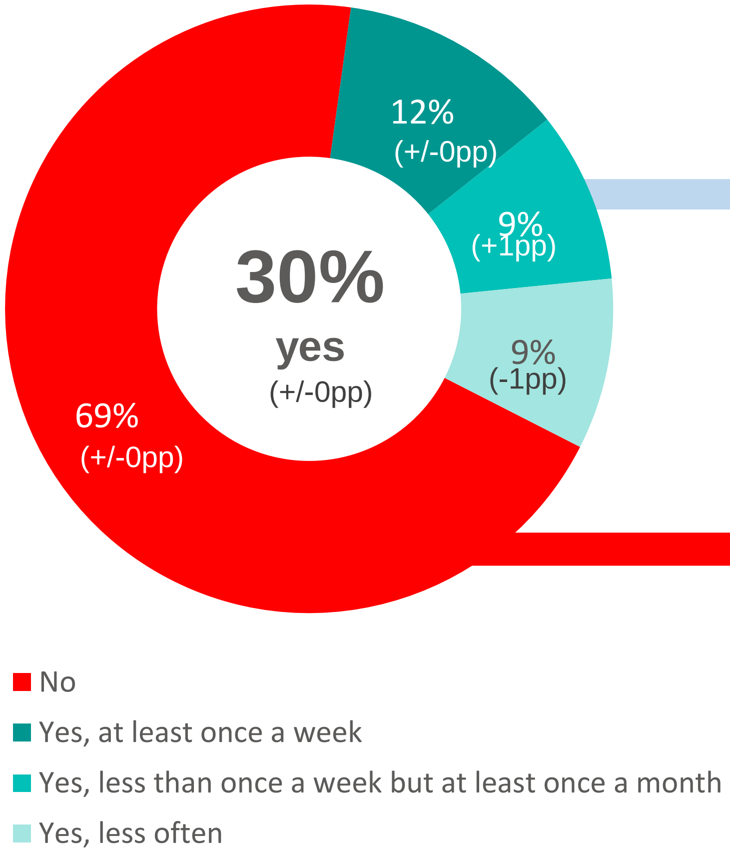


LW1.. Have you been involved with any of the following types of groups, clubs or organisations during the last 12 months? Unweighted base: 1540 (All respondents)

Around 1 in 3 respondents have volunteered in the past year. Those aged 16-24, minority ethnic groups, those with larger households and parents are more likely to have volunteered

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

Survey 13 (July) only



Surveys 11, 12 and 13 combined:
The following groups are more likely to volunteer, compared to the Greater Manchester average (30%)*:
42% Those aged 16-24
41% Minority Ethnic groups
40% Those living with 4+ people in their household
35% Parents
35% Those with a full time paid job
33% Those with very high levels of life satisfaction

Surveys 11, 12 and 13 combined:
The following groups are less likely to volunteer, compared to the Greater Manchester average (where 68% have not volunteered)*:
90% Those not in work due to ill health or disability
79% Those aged 55-64
76% Those with a mobility disability
76% Those with low levels of anxiety
73% Those who rent their home
71% Female respondents

Significantly higher/lower than S12 Figures in brackets show change since May (S12)

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

Cost of living

Cost of living and food security – context and approach

Cost of living has been a central theme in the Greater Manchester Residents' Surveys since September 2022 (and has now been covered across eleven surveys). As questions on cost of living have been asked across multiple surveys, we have tracked data over time. We have also merged data where possible, to create a larger and more robust sample for greater analysis of sub-groups. Many questions within this section use a merged sample from the results from surveys 11, 12 and 13.

The focus of this research is to provide a growing base of evidence, which can highlight potential trends and indicators which individual localities and partners can explore in greater detail. As this evidence base has grown across multiple surveys, we are able to provide greater depth on which groups are likely to be more affected by the issues explored, highlighting those where more investigation would prove useful.

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 8th – 19th July 2024) have been compared to the most closely matched ONS fieldwork period, between 5th – 30th June 2024. ONS uses a mixed methodology, both online and telephone interviews. Please note that some Greater Manchester questions in this section have had their wording or answers options adjusted to reflect changes to the ONS' Opinions and Lifestyle Survey, and so comparisons with Greater Manchester survey 3 and 4 findings may therefore not always be possible.

Cost of living – key findings (1 of 2)

COSTS OF LIVING – OVERALL TRENDS

- Over half of respondents (55%) say that their cost of living has increased over the last month – significantly higher than the Greater Britain average (51%)*. This figure has, however, declined since surveys in February 2024 (59%) and November 2023 (61%)
- While smaller proportions of people in Greater Manchester say their food and fuel costs have increased compared to national figures, significantly more people here are reporting recent increases in their energy, rent and childcare compared to Great Britain as a whole.
- However, compared to May 2024's survey, fewer people in Greater Manchester are reporting recent cost increases in all key areas, except childcare where more people have reported increased costs than in May's survey.
- Food and energy remain the biggest causes of people's increased costs of living – reported by 85% and 61% of respondents respectively.
- Almost half (47%) of respondents say it is difficult to afford their energy costs – remaining significantly higher than the Great Britain average (37%)
- The proportions of mortgage holders and renters who are finding it difficult to afford their mortgage (39%) and rent (53%) have risen since May (were 33% and 46%)
- Renters of housing association / housing trust properties have in particular reported increased difficulties in paying their rent (increase of 11 percentage points since May, compared to increase of 7 percentage points for all renters)
- Compared to May's survey, significantly more people now say they have had to borrow more or use more credit in the last month compared to a year ago (31%, was 26% in May)
- Around half (49%) of respondents say they would be able to afford an unexpected but necessary expense of £850 – lower than the 3 in 5 (60%) in Great Britain
- Almost 1 in 5 (18%) respondents feel unsure if they will be able to save money over the next year – a significant increase since May
- Almost half (46%) of respondents who pay for social care packages have had to cancel or cut back because they can no longer afford it. 4 in 10 (40%) have been behind in their payments at some point in the past year.

*Since February's survey was carried out, the ONS survey used for benchmarking throughout this section has changed its methodology. This change has influenced the results, and is part of the reason why Greater Manchester and Great Britain figures now appear more similar.

Cost of living – key findings (2 of 2)

HOUSING - ONGOING TRACKING

As discussed on the previous slide, a third (33%) of mortgage holders say they are finding it difficult to afford these payments, and over half of renters (53%) say it is difficult to afford their rent.

- Over the last three surveys, half (49%) say it is difficult to afford their rent. This is mainly driven in difficulties faced by those renting from a local authority or council (51%), then private renters (49%) and finally those renting from housing associations or trusts (46%)
- The proportion of renters who say they find affording their payments difficult has increased since the last survey (53%, was 46% in May). This most recent fluctuation is driven by tenants of Housing Associations (50%, was 39%) though there have been increases across all rental types

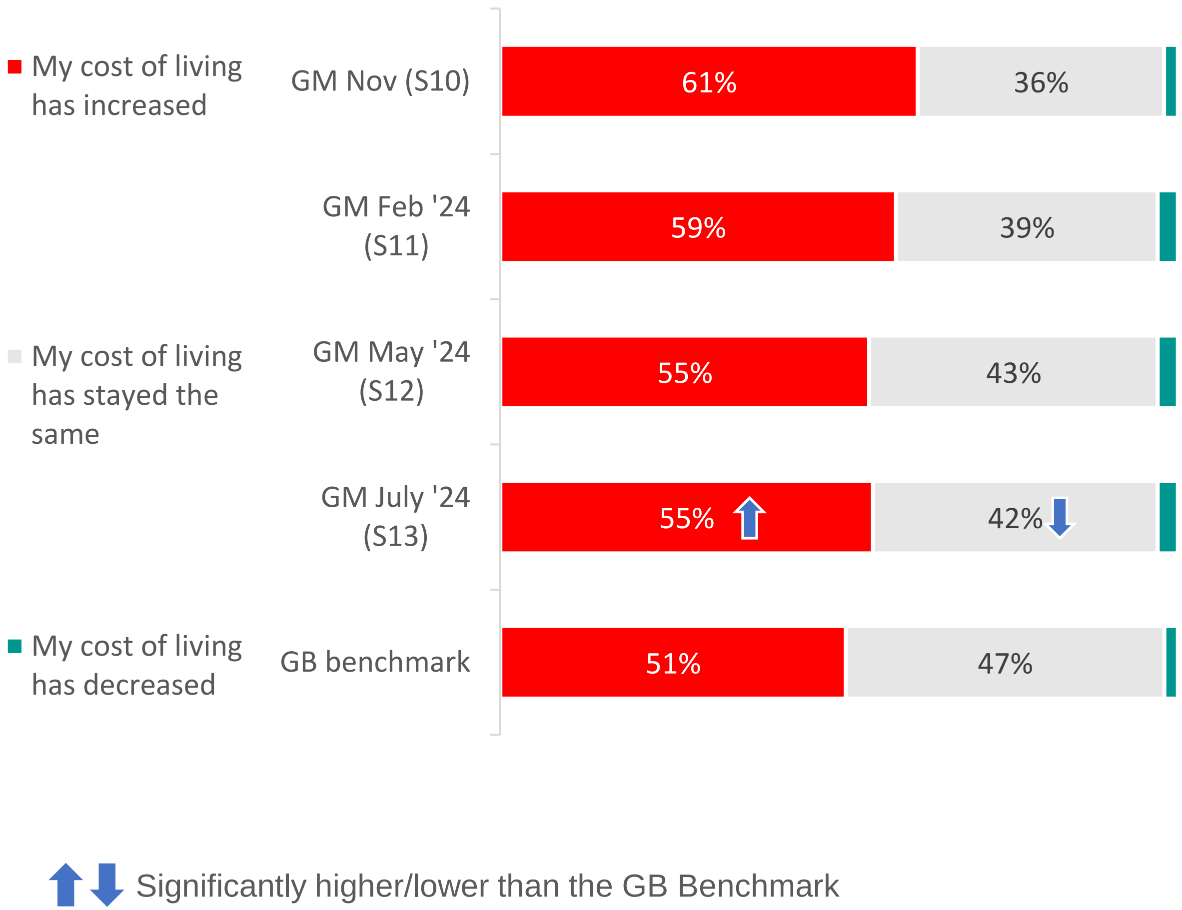
FOOD - ONGOING TRACKING

This survey has seen a reverse in previous positive trends in respondents saying they have not, at any point in the last 12 months, experienced any food security issues:

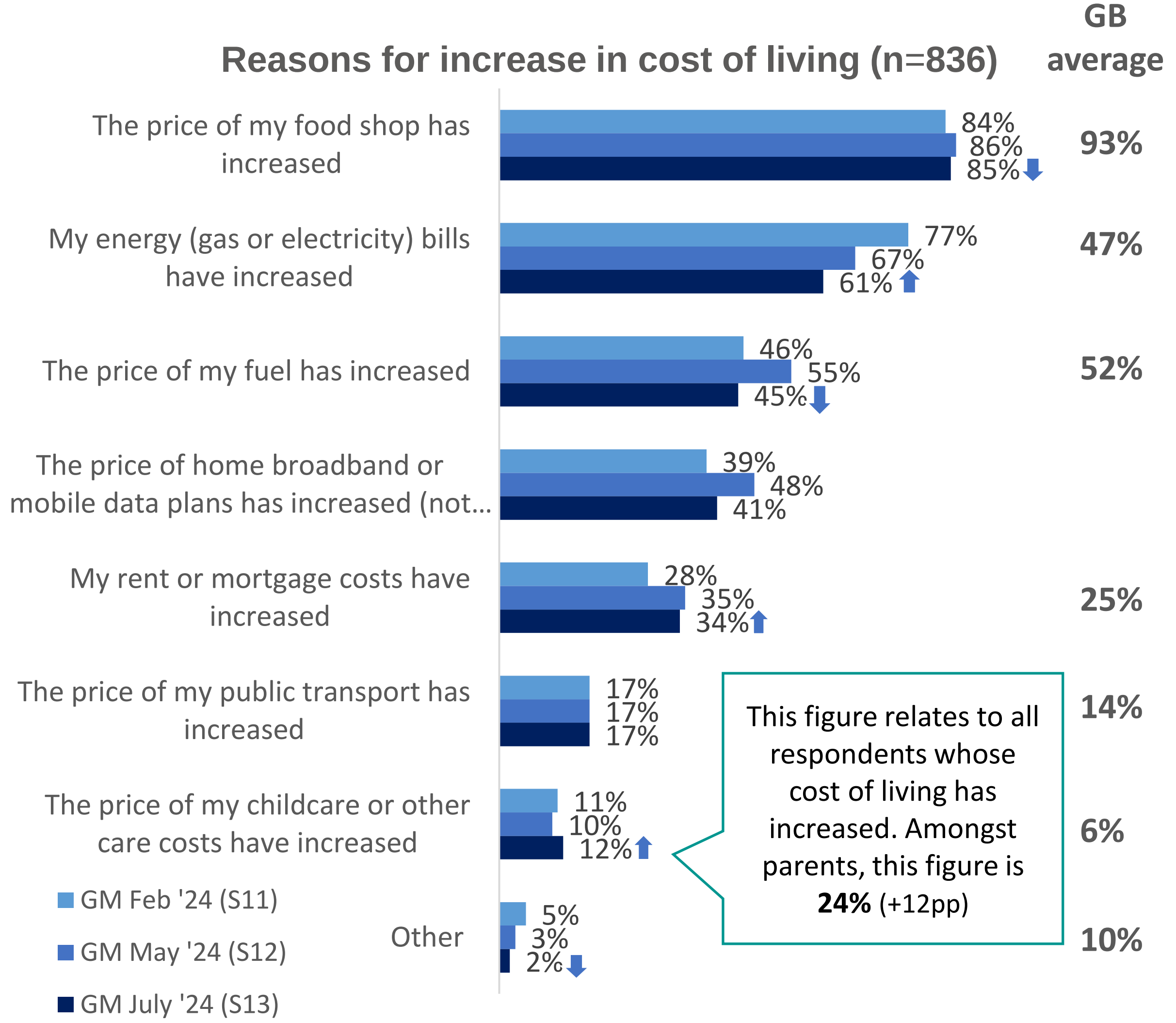
- 64% have not, at any point, found that the food they bought didn't last and didn't have the money to buy more (was 69% in May)
- 63% have not, at any point, worried whether their food is going to run out before being able to buy more (was 66% in May)
- 60% say that they have not, at any point, been unable to afford to eat balanced meals (was 64% in May)

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

Change in cost of living over the last month

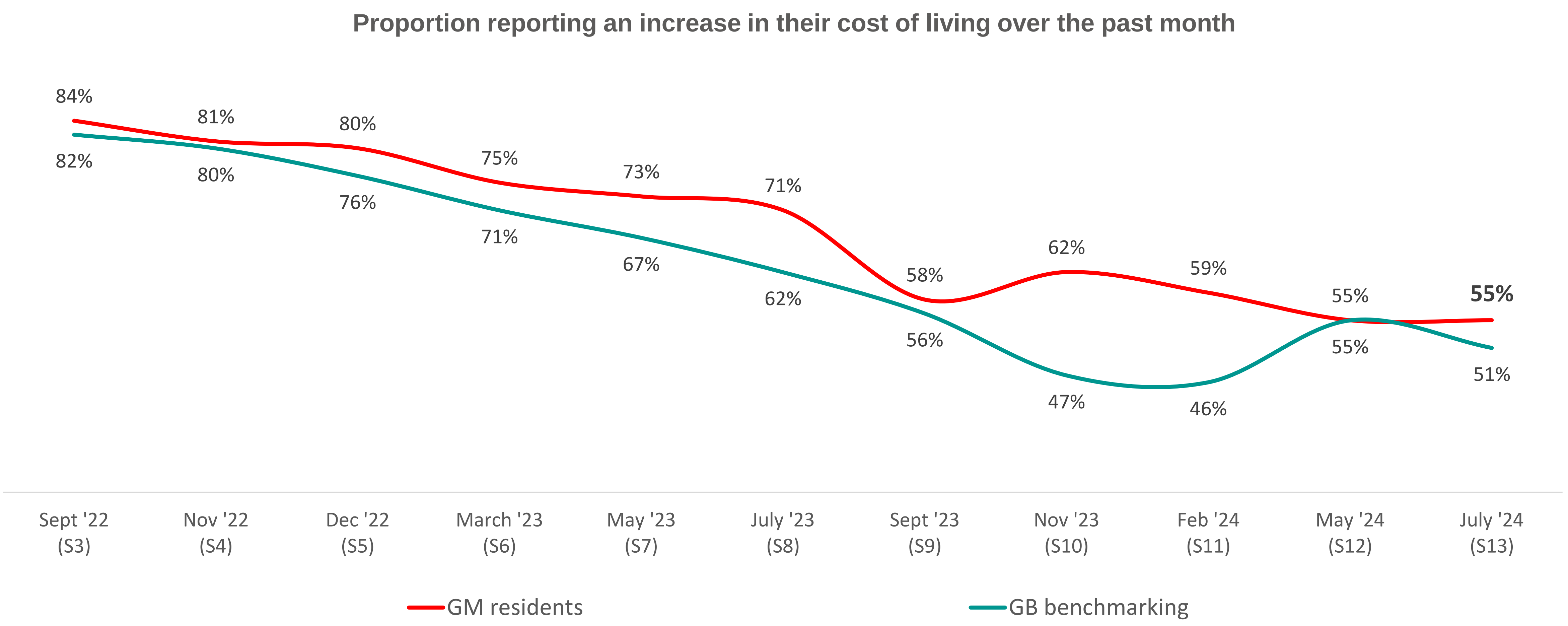


Reasons for increase in cost of living (n=836)



CL5. Has your cost of living changed compared to one month ago? CL6. Over the last month, in which ways has your cost of living increased? Base: S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540 (All respondents); S9, 945; S10, 964; S11, 860; S12, 854; S13, 836 (All whose cost of living has increased). ONS data, based on national fieldwork 5th – 30th June 2024

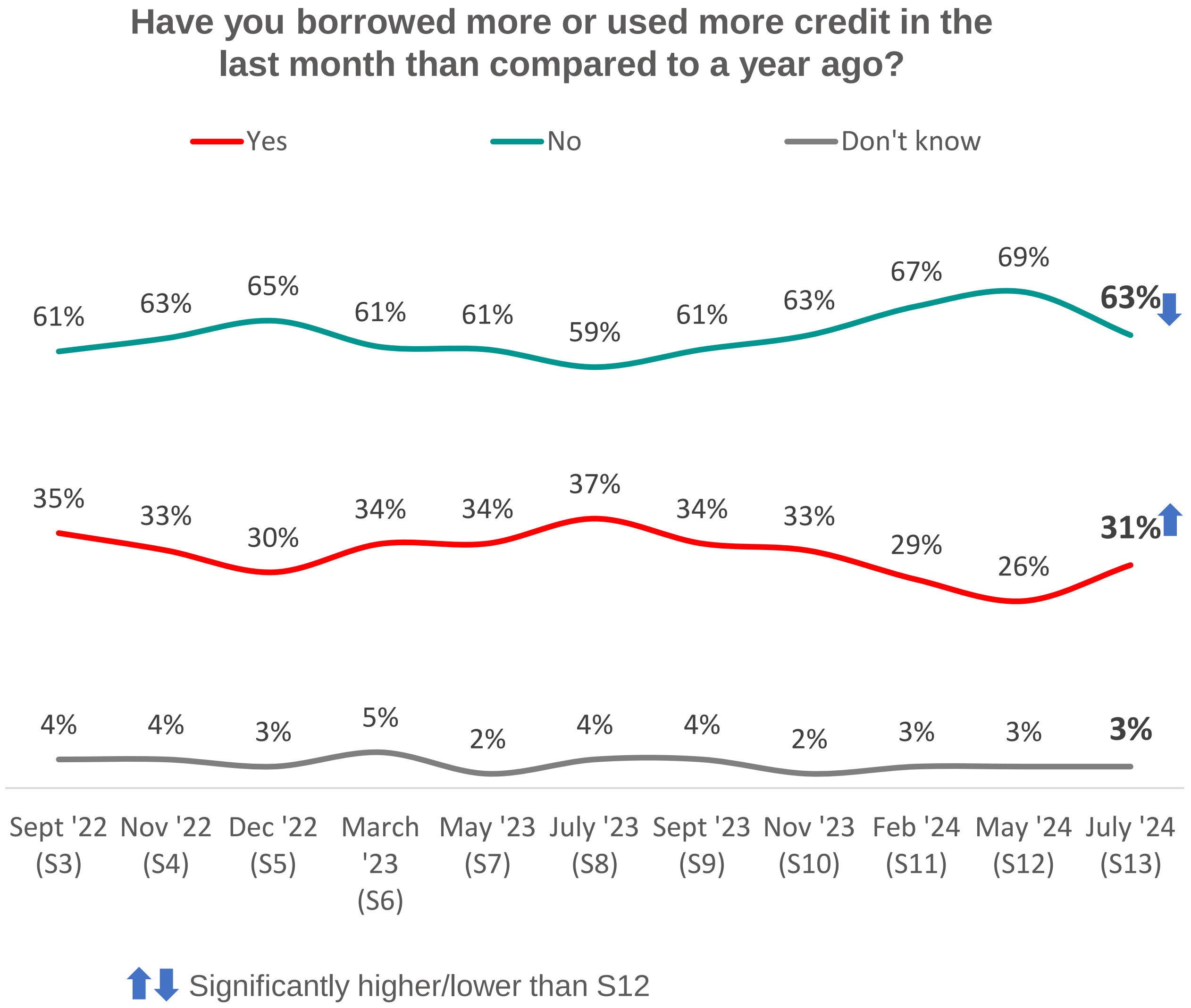
Whilst the gap between GM and the GB average has widened since May, the proportion of Greater Manchester respondents saying their cost of living has increased remains the lowest it has been since tracking began in September 2022



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

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

The proportion of respondents who borrowed more money or used more credit in the past month has risen significantly since May, to just under 1 in 3 respondents (31%). Despite this rise, the figure is still 6 percentage points lower than at the same time last year



Between February and July (S11-13.), those who have borrowed more money or used more credit than usual in the last month, compared to the GM average (29%), are higher among:

Demographics:

- Those with a disability (38%); including those with learning disabilities (49%) or mental ill health (49%)
- Gay women (46%)
- Pakistani respondents (44%)
- Parents of children aged 5 and under (41%)

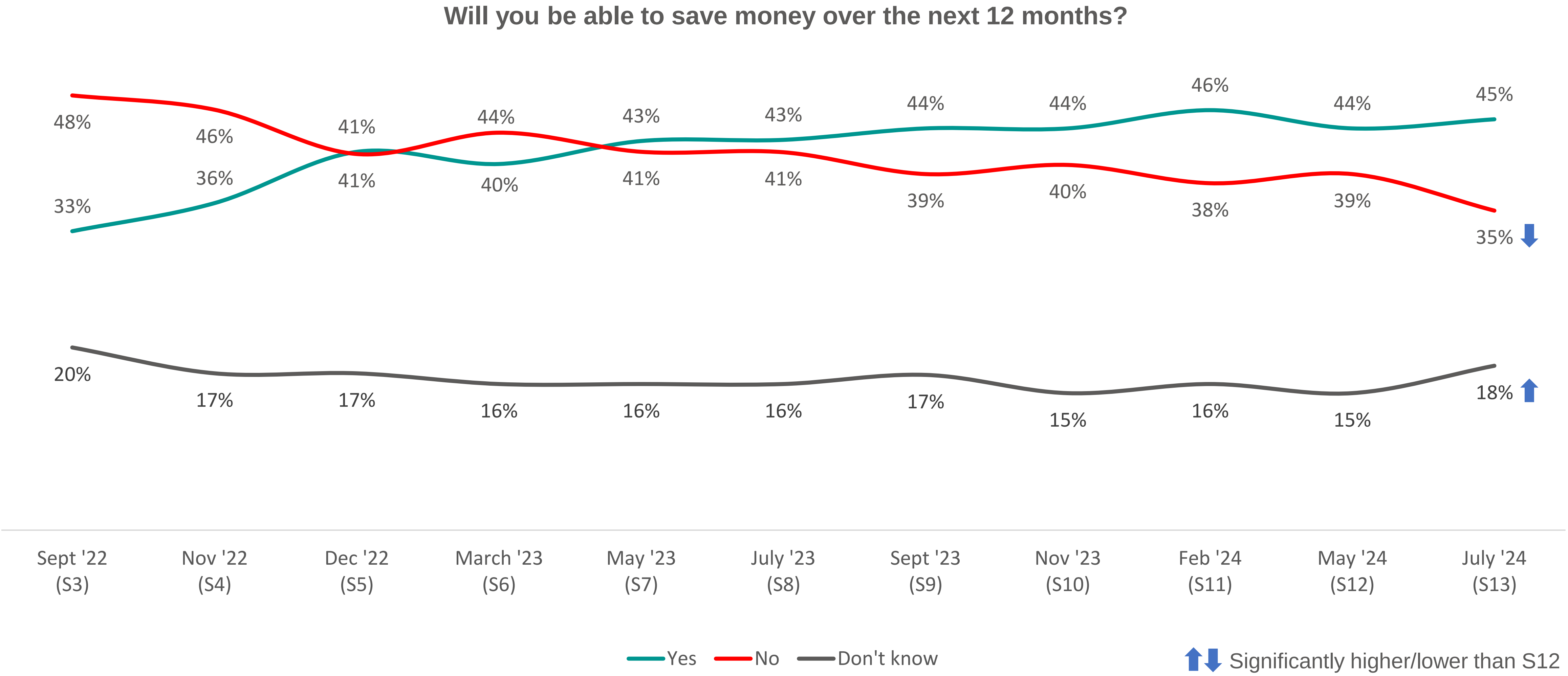
Individual and/or family circumstance:

- Those who are financially vulnerable (71%)
- Those who have not eaten all day for lack of money (62%) or cut or skipped a meal (59%)
- Those who find it difficult to afford their mortgage (51%), or their rent (51%)
- Those not in work due to ill health or disability (50%), or out of work for 6 months or less (47%)
- Those who disagree that they are able to look after their own health (48%) or know enough about their own health (48%)
- Those renting from local authorities or councils (44%) or housing associations or trusts (41%)
- Those earning below the Real Living Wage (41%)

*subgroup analysis uses S11-13 data

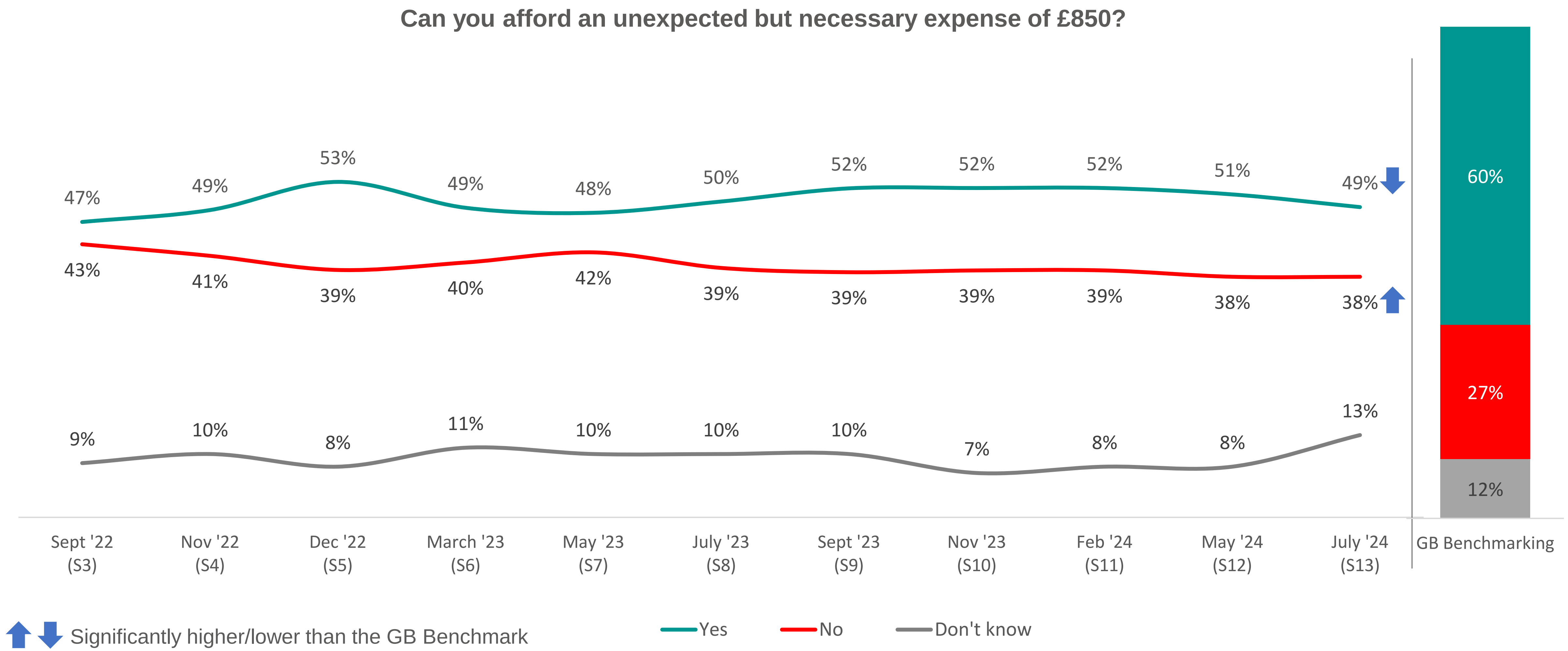
CL3. Have you had to borrow more money or use more credit than usual in the last month, compared to a year ago? Unweighted base: Survey 5, 1470; Survey 6, 1767; Survey 7, 1488; Survey 8, 1612; Survey 9, 1560; Survey 10, 1546; Survey 11, 1460; Survey 12, 1551; Survey 13, 1540 (All respondents);

Over 2 in 5 (45%) think they will be able to save money over the next 12 months – in line with May. Although there has been a significant decline in those saying they will not be able to save money since May – the proportion of those who are unsure has risen significantly as well, indicating some uncertainty among respondents



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 (All respondents).

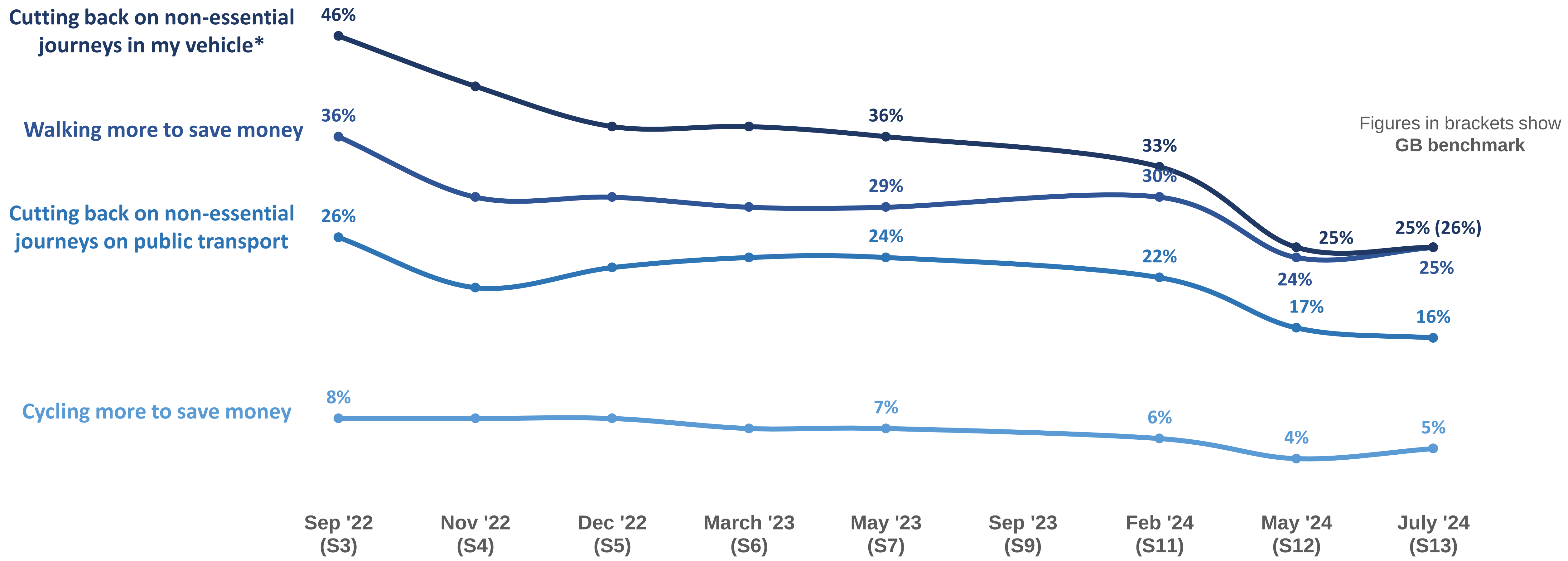
However, Greater Manchester respondents continue to be considerably less likely than the GB average to be able to afford an unexpected expense of £850. This ability has remained largely stable, at around half of local respondents



CL2. Could your household afford to pay an unexpected, but necessary, expense of £850? Unweighted base: Survey 3, 1677; Survey 4, 1636 Survey 5, 1470; Survey 6, 1767; Survey 7, 1488; Survey 8, 1612; Survey 9, 1560; Survey 10, 1546; Survey 11, 1460; Survey 12, 1551; Survey 13, 1540 (All respondents). ONS data, based on national fieldwork 5th – 30th June 2024

As a result of cost-of-living increases, 8 in 10 respondents said they are taking actions to save money (84%). There has been no significant movement in actions taken as a result of cost-of-living increases since May ‘23

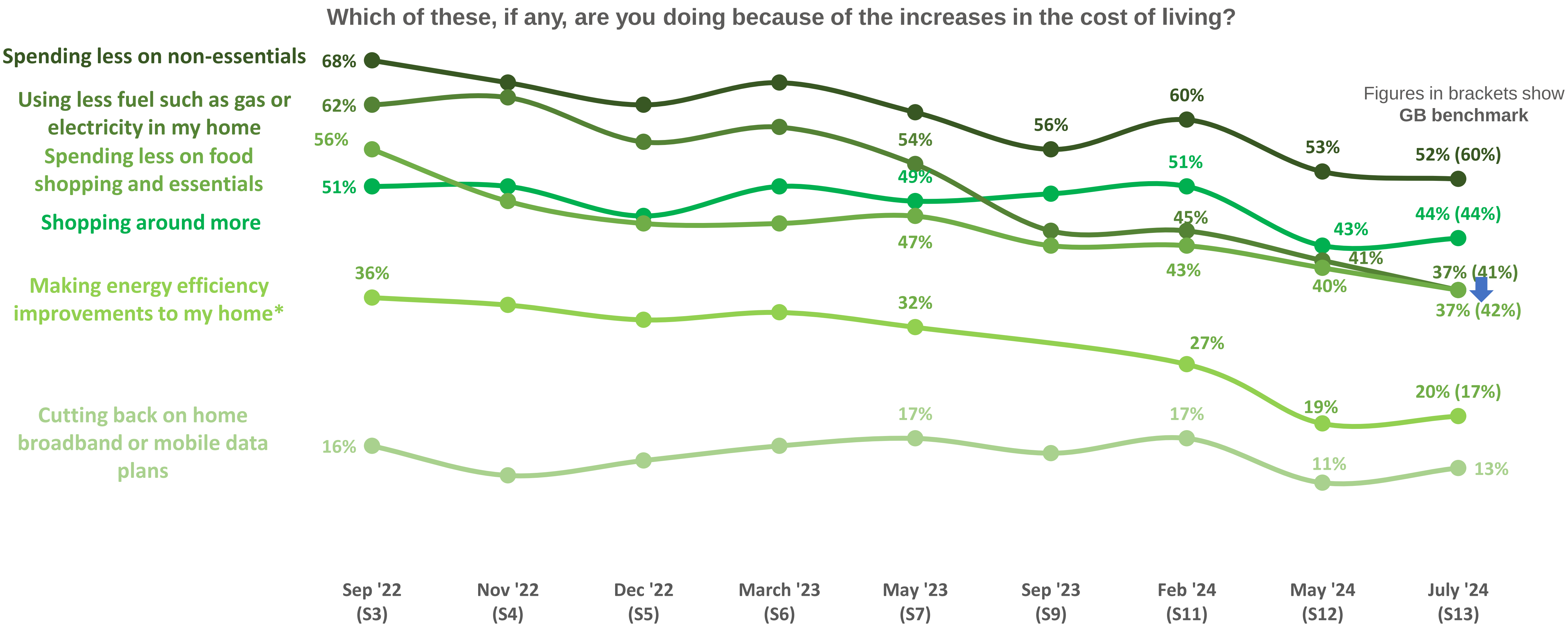
Which of these, if any, are you doing because of the increases in the cost of living?



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

CL7. Which of these, if any, are you doing because of the increases in the cost of living? 1,540 (All respondents).
*Not asked in S9
GB benchmarking is not available for all statements. Statements which can be compared are shown in backets where available.

The only action to have fallen significantly since May, is using less fuel in my home, which is also lower than the Great Britain average



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

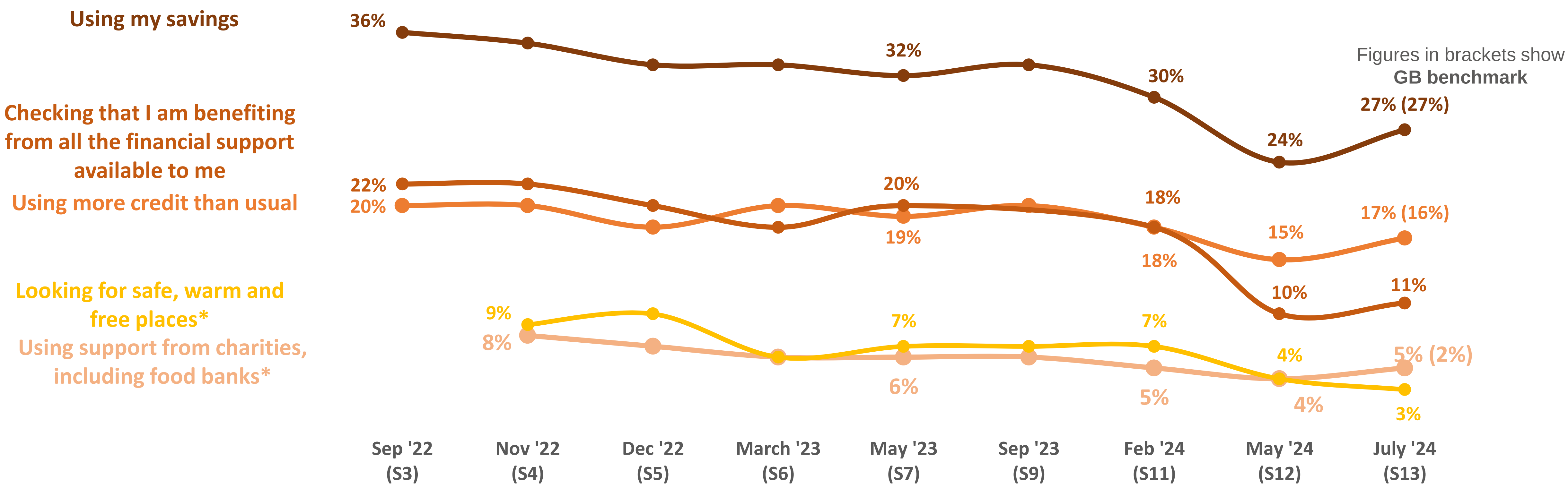
Significantly higher/lower than S12

CL7. Which of these, if any, are you doing because of the increases in the cost of living? 1,540 (All respondents).
*Not asked in S9

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

1 in 4 Greater Manchester respondents are using their savings due to the increases in the cost of living having risen - no significant change since May. Most actions are in line with the GB average

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

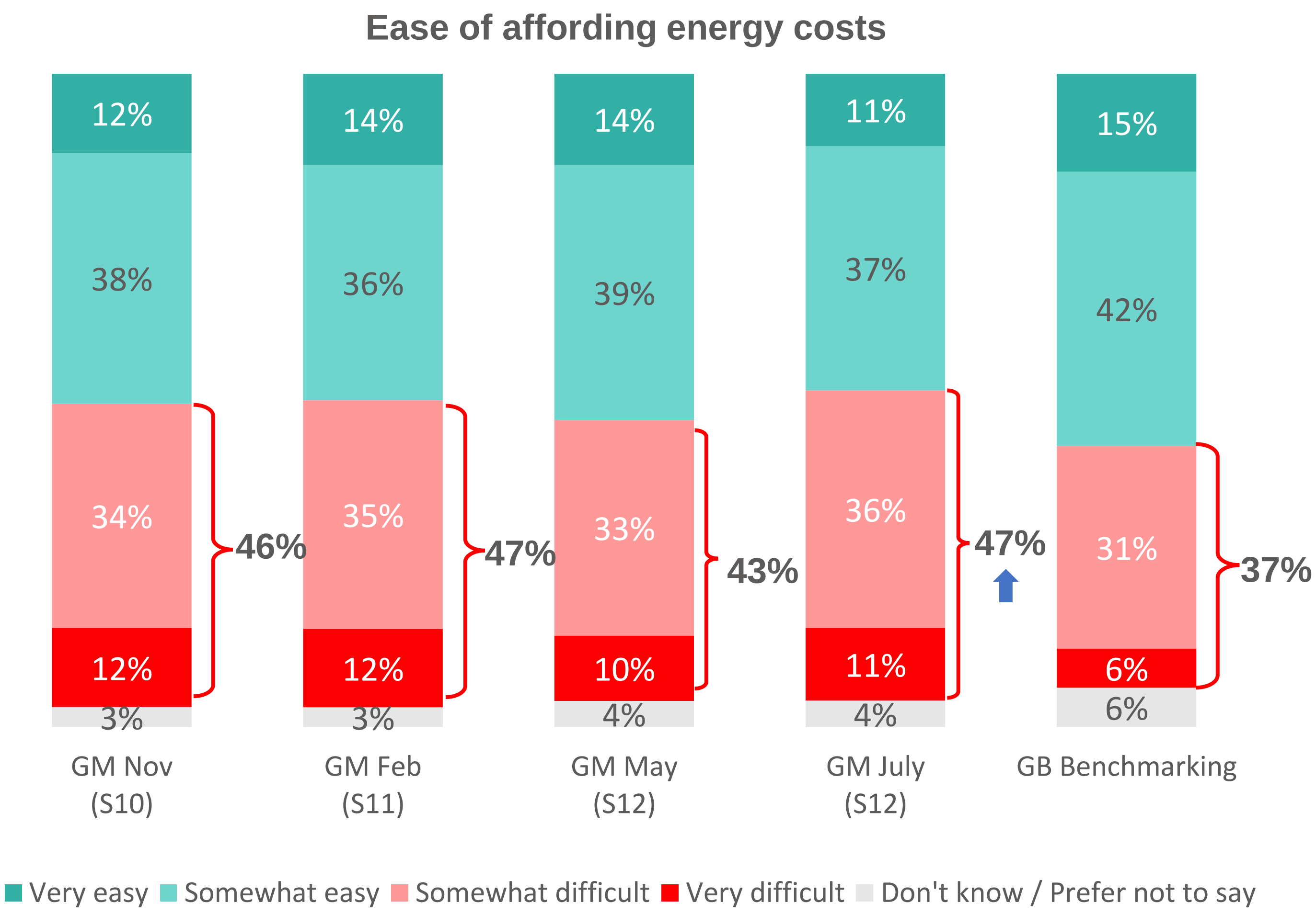


Data points shown wherever statement was included in fieldwork. Percentage figures included from May 2023 to provide a frame of reference - other specific % figures available on request

CL7. Which of these, if any, are you doing because of the increases in the cost of living? 1,540 (All respondents).
*Not asked in S3
**Not asked in S3

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

Almost half of respondents (47%) say they have difficulty affording energy costs, returning to February levels and remaining significantly higher than the Great Britain average. Those from within racially minoritised communities and renters remain more likely to be having these difficulties



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

Demographics:

- Those from within racialised communities (55%), including Pakistani respondents (70%)
- Those with a disability (61%), including those with mental ill health (68%) or a mobility disability (61%)

Individual and/or family circumstance:

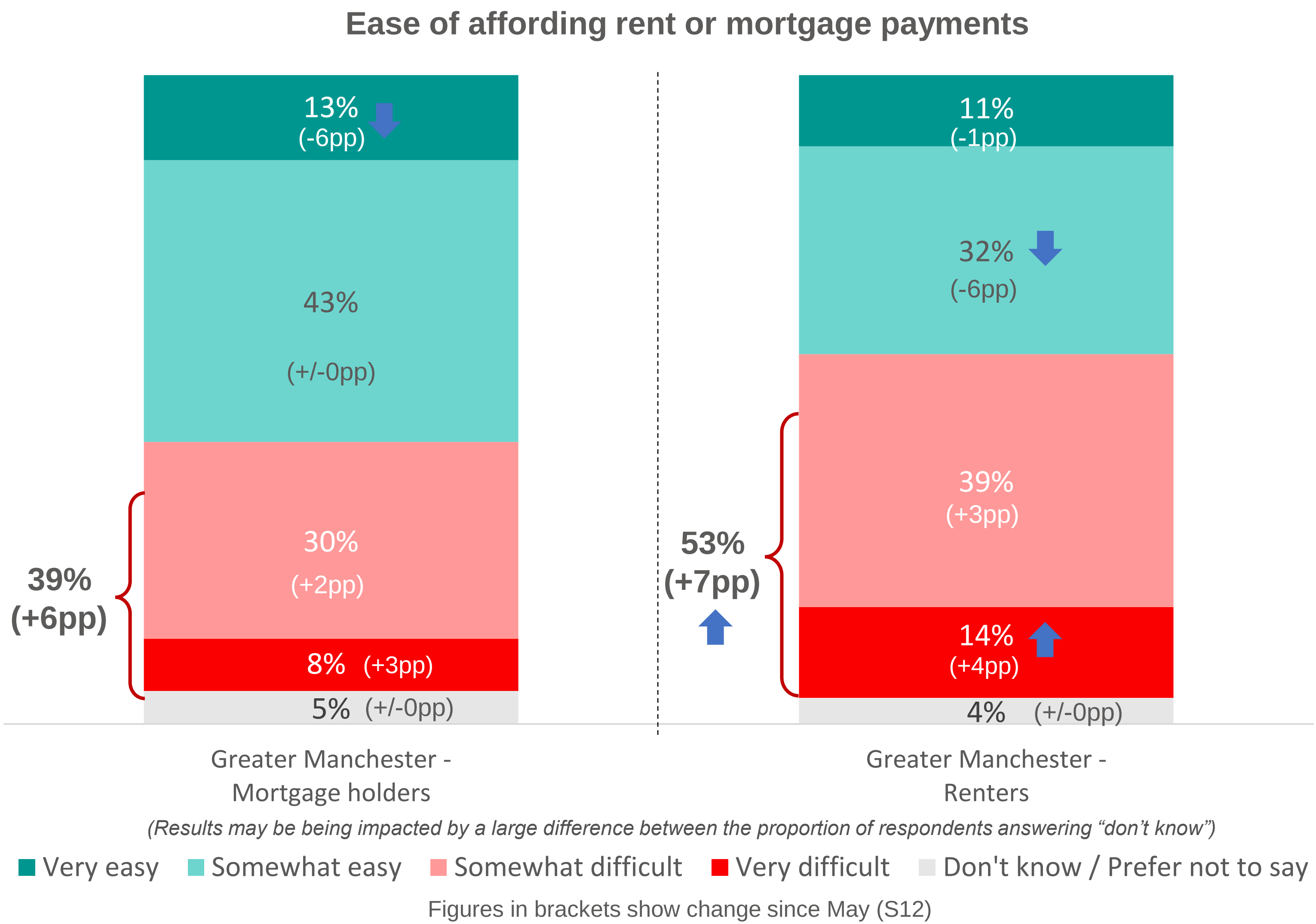
- Those who are financially vulnerable (93%)
- Those who find it difficult to afford their rent (88%), or their mortgage payments (87%)
- Those who are not in work due to ill health or disability (78%), or out of work for 6 months or less (72%)
- Those who have cut the size or skipped a meal (77%), or didn't eat for a whole day due to lack of money (71%)
- Those without the ability to look after their own health or know enough about their own health(70%)
- Those who have had to borrow money or use more credit in the last month (70%)
- Those renting from local authorities or council (66%) or housing association (63%), or living with a friend or family member (65%)

*Subgroup analysis uses merged data from S11-13

⬆⬇ Significantly higher/lower than the GB Benchmark

CL9. How easy or difficult is it to afford the following? Unweighted base: Survey 9, 1497; Survey 10, 1488; Survey 11, 1403; Survey 12, 1551; Survey 13, 1471 (All respondents who pay their energy costs). ONS data, based on national fieldwork 5th – 30th June 2024

The proportion of mortgage holders and renters finding it **difficult to afford their mortgage and rental payments** have both increased since May



% who are significantly more likely to find it difficult to afford mortgage payments compared to the GM average (36%):

- Those from within racially minoritised communities (55%), including Asian or Asian British respondents (59%)
- Those who have had to borrow more money or use more credit in the last month (54%)
- Those earning below the Real Living Wage (51%)
- Those aged between 16-24 (50%)
- 4 person households (48%)
- Those with high anxiety (47%)

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

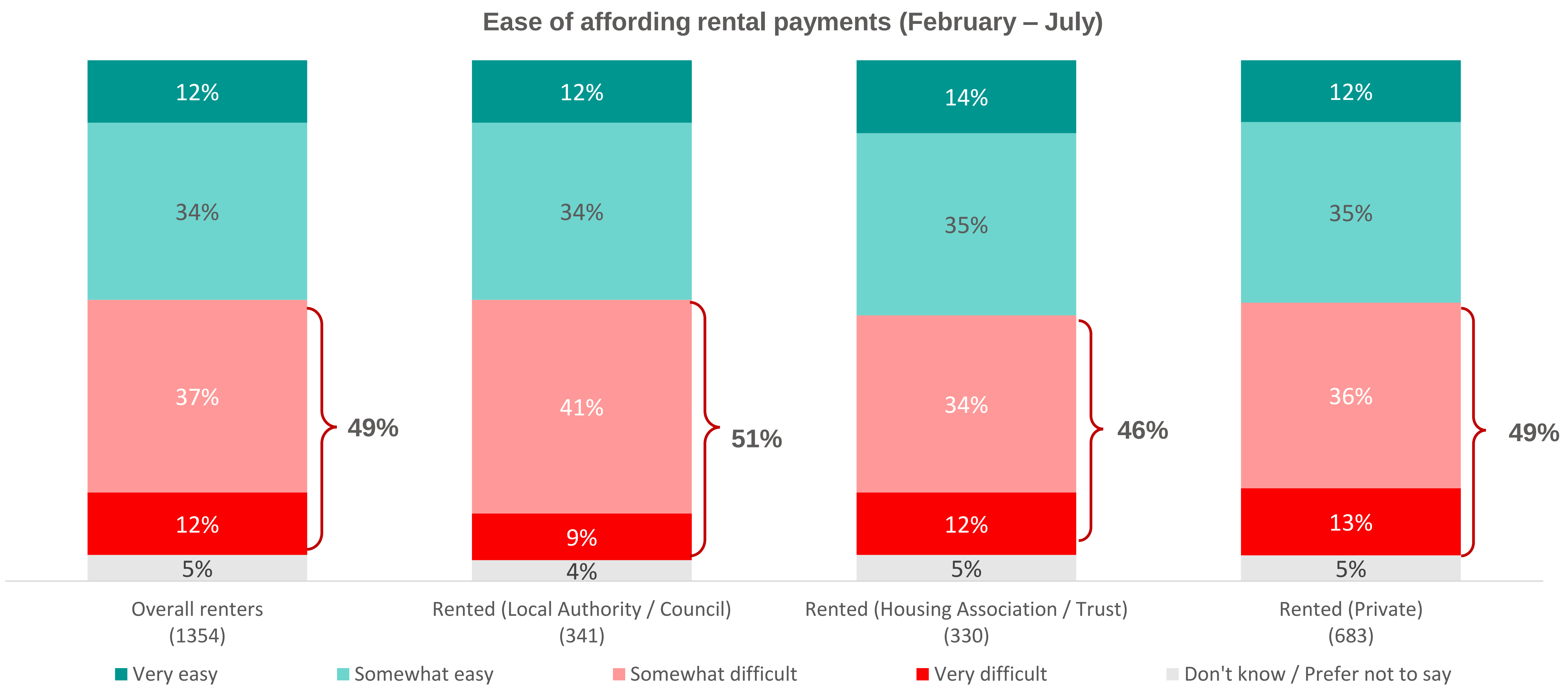
- Muslim respondents (62%)
- Those who have had to borrow more money or use more credit in the last month (62%)
- Those with children aged 19-25 (61%)
- Those in Rochdale (61%)
- Those who say their cost of living has increased in the past month (58%)
- Those in part time employment (59%)

*subgroup analysis uses S11-13 data

Significantly higher/lower than S12

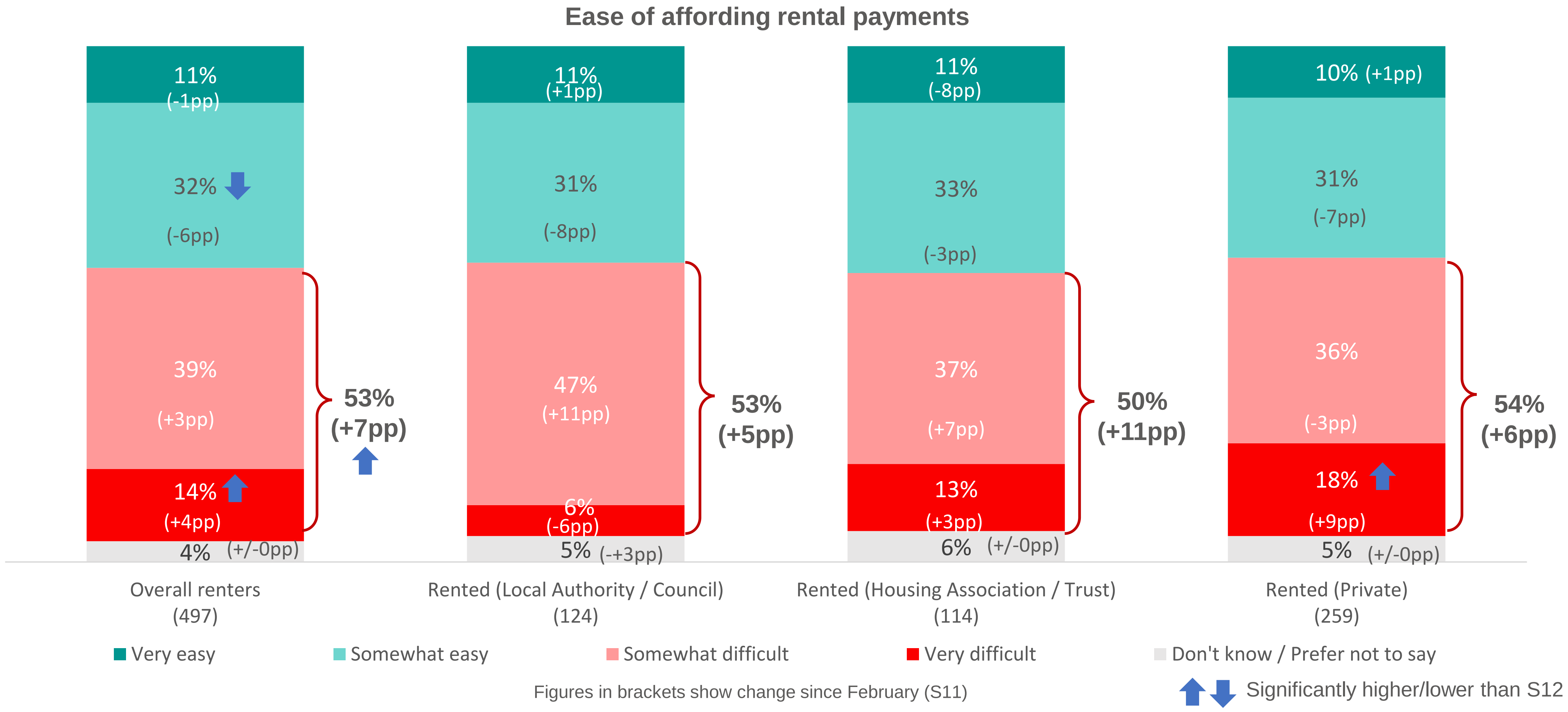
CL9. How easy or difficult is it to afford your...
Base: 383 (All who do not own their home outright – except those that don't pay this); 497 (All who rent their home – except those that don't pay this)

Using merged data across the past three surveys, almost half of renters have said they find it **difficult to afford rental costs**. Those renting from Local Authorities or Councils continue to report more difficulties than renters overall.



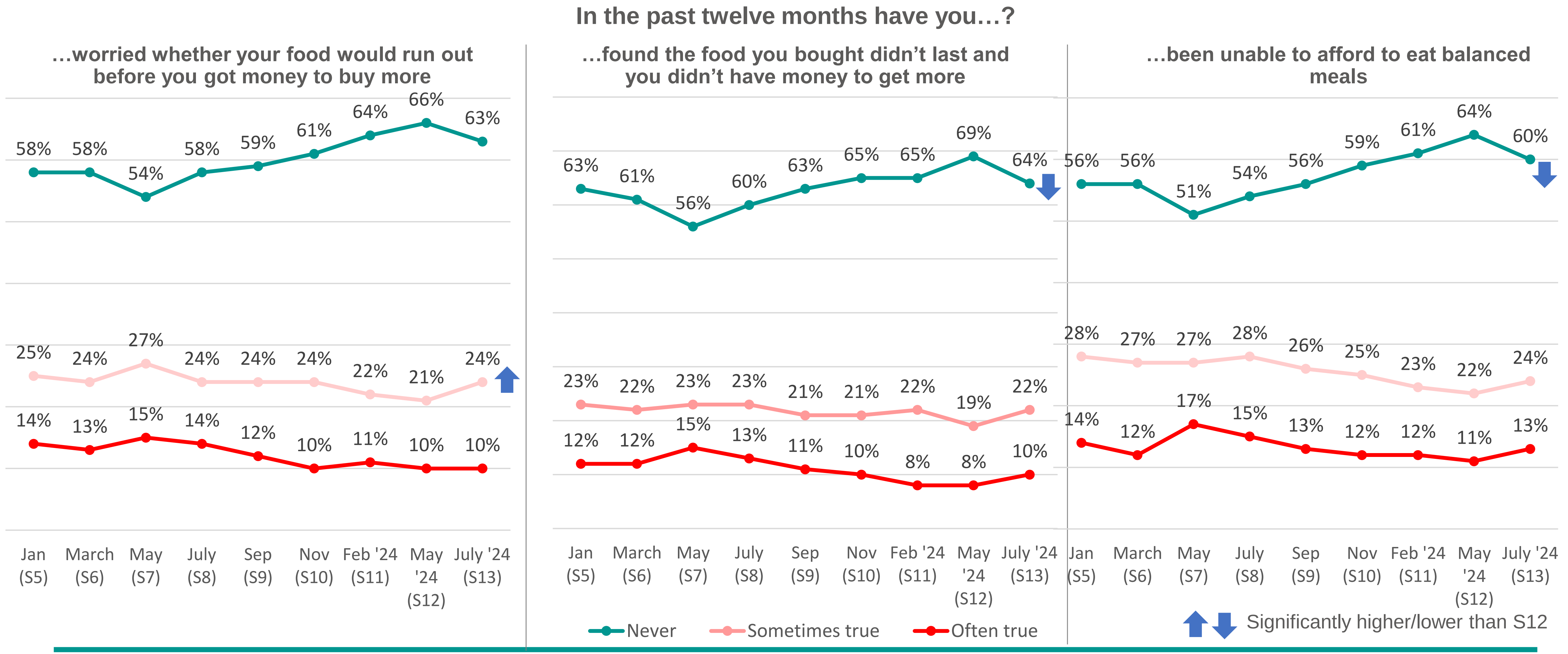
CL9. How easy or difficult is it to afford your...
Base: Surveys 11+12+13= 1354 (Respondents who rent)

The significant rise in difficulty in affording rent is being driven in increases in difficulties paying rent across all rental types – particularly housing associations and trusts. There has been a significant increase in private renters finding it very difficult to afford their rent.



CL9. How easy or difficult is it to afford your...
Base: 497 (All renters); 124 (Rented (Local Authority / Council)); 114 (Rented (Housing Association/Trust)); 259 (Rented (Private))

There has been an increase since May in GM respondents saying they have, at any point in the last 12 months, experienced food security issues. Across all statements, more respondents are saying they experience food security issues at least sometimes or often



B2. How true would you say the following statements are when applied to your household for the last 12 months?
Unweighted base: 1,442 (S3); 1,366 (S4); 1,220 (S5); 1,517 (S6); 1,235 (S7); 1,362 (S8), 1,312 (S9), 1296 (S10), 1201 (S11), 1300 (S12), 1263 (S13). Nb Respondents who said 'don't know' or 'prefer not to say' are excluded from these charts

Nearly half (46%) of respondents who have paid for a care package in the past 12 months have had to cut back or cancel this due to not being able to afford it. 2 in 5 report having been behind in payments for care packages

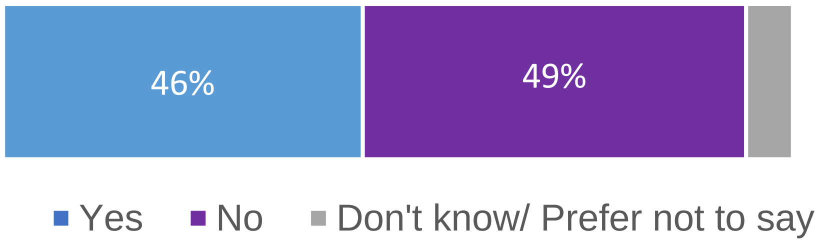
Have you paid for a care package from your local authority?

7%

have paid for a care package

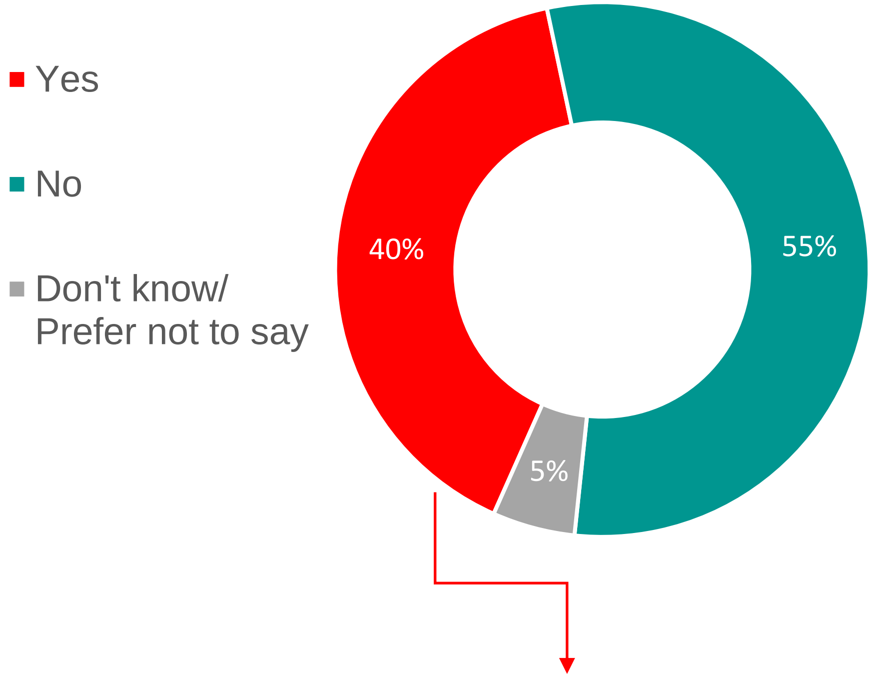
3% have paid for a care package for themselves
4% have paid for a care package for their family members
There has been no significant change in these metrics since May '24

Among those who have paid for a care package, have you had to cut back or cancel because you can no longer afford to pay for it?



Please note – data analysis on this slide uses S11-13 data

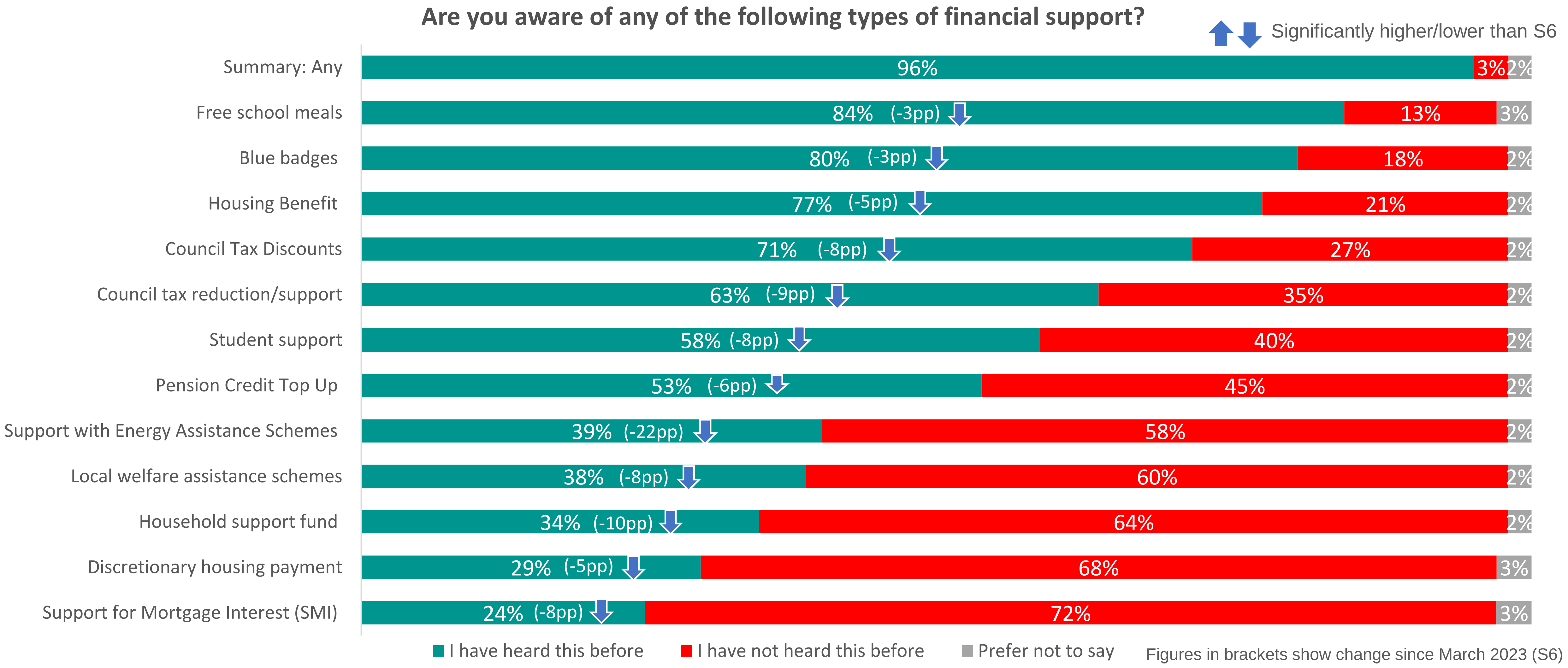
Among those who have paid for a care package (300 GM respondents over 3 surveys), in the last 12 months have you ever been behind in your payments for your care package?



59% of those who have been behind in payments for their care package have received contact from a debt collector about these arrears

QL30 Do you pay for a care package from your Local Authority? QCL31. Have you had to cut back or cancel your care package because you can no longer afford to pay for it? QCL32. In the last 12 months, have you ever been behind in your payments for your care package? QCL33. Have you received contact from a debt collector about these arrears? Base: All respondents: S11 + S12 + S13 (4551); All who pay for care packages for themselves or families (303)

Most forms of financial support are known by respondents, though awareness has dropped significantly since last asked in March 2023 – e.g., awareness of support with energy assistance schemes has fallen by 22pp. A trend towards some households feeling less financial pressure could account for people being less likely to seek out additional support



CL21. The following question asks about income maximisation. Are you aware of any of the following types of financial support?
Base: All respondents, 1,540

Digital inclusion

(Findings from the Feb-July merged into groups of three waves, telephone / face to face samples only)

Unweighted base: 760 (Telephone / Face to face respondents S11+S12+S13)

Digital inclusion – context

Sampling

Digital inclusion questions have been included in the survey since Spring 2022 (though the methodology / approach was amended in September 2022).

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 Greater Manchester activity to address digital exclusion.

Merged Findings

For this report, we have merged findings for survey 13 (July 2024), with those from survey 12 (May 2024) and survey 11 (February 2024) to provide a robust sample size for sub-group analysis. Note that as surveys 12 and 13 used a different methodological approach (with face-to-face interviews as opposed to telephone interviews), the merged sample contains different methodologies.

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

Change in Methodology

Survey 13 is the second time where the face-to-face methodology has been used. 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 the results in this section of the report. 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. 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.

** Base sizes: Survey 11 (259), Survey 12 (251), Survey 13 (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 11+12+13 combined data)

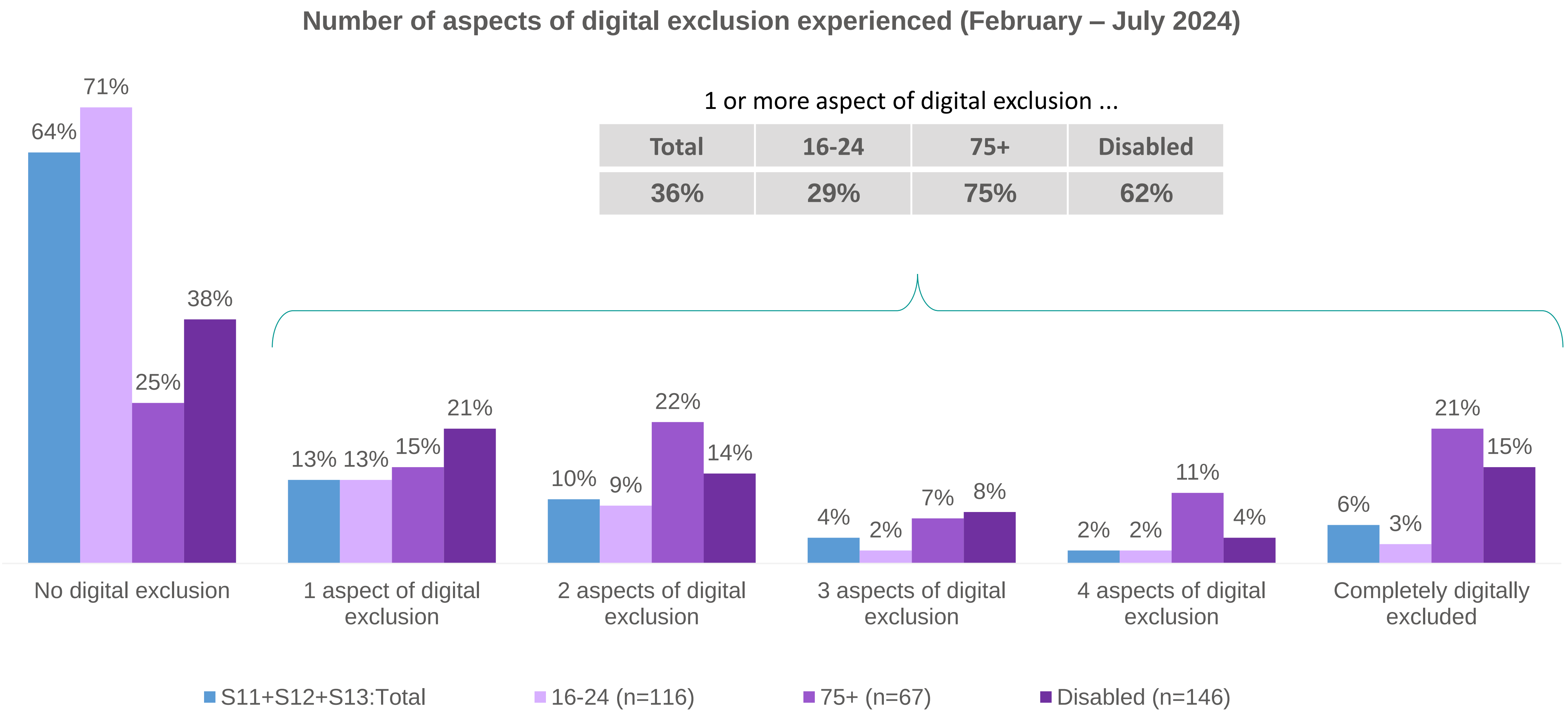
- Over a third (36%) of respondents said that their household experienced some form of digital exclusion, an increase from surveys 8-10 (32%)
- One-fifth (21%) of Greater Manchester households experienced a single aspect of digital exclusion, while 15% have experienced all 5 aspects of digital exclusion
- There have been increases in those aged 16-24, 75+ and disabled respondents reporting any form of digital exclusion:
    - 75% of those aged 75+ now say they have experienced one or more aspect of digital exclusion, compared to 67% in surveys 8-10
    - 62% of disabled respondents report experiencing at least one form of digital exclusion, rising from 41% in surveys 8-10
    - 29% of 16–24-year-olds now say they have experienced one or more aspect of digital exclusion, slightly higher than the 24% reported in surveys 8-10

CONFIDENCE USING DIGITAL SERVICES (survey 11+12+13 combined data)

- 22% of respondents say either they (16%) or someone in their household (13%) is not confident using digital services online.
- Using subgroup analysis from S11-13, this proportion is also higher among older cohorts aged 75+ (59%) and disabled respondents (33%)

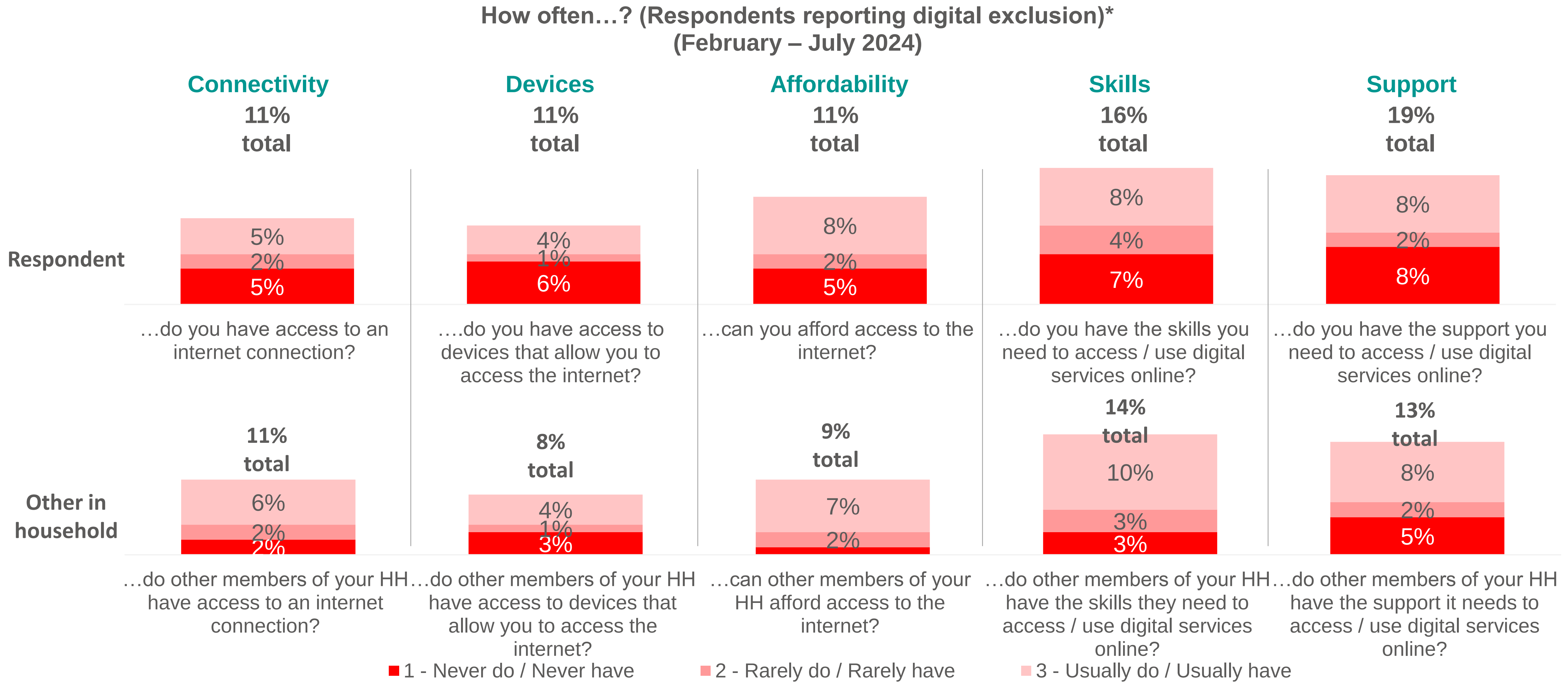
** Base sizes: Survey 11 (259), Survey 12 (251), Survey 13 (250)*

Over a third of respondents report experience of at least one aspect of digital exclusion in their household. This rises to 62% of disabled respondents and 75% of respondents over 75



DI11. How often…? Unweighted base: 760 (Telephone / Face to face respondents) Prefer not to say not shown. Question in was asked as a grid, between "you" and "others in your household". The data on this slide shows the percentages of households where there is someone (either you or others) who has said they are digitally excluded. *Aspects of digital exclusion = consistent and reliable access to an internet connection at home; to devices that allow access to the internet; affording access to the internet; skills needed to access and use digital services online; support needed to access and use digital services online

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: 760; Survey 11, 259; Survey 12, 251; Survey 13, 250 (Telephone / face to face respondents respondents) *Prefer not to say, 4, and 5 not shown.

Those aged 75+ and disabled respondents continue to be far more likely not to have access to enable them to get online all or most of the time, or the skills and support to do so. This is consistent with previous surveys

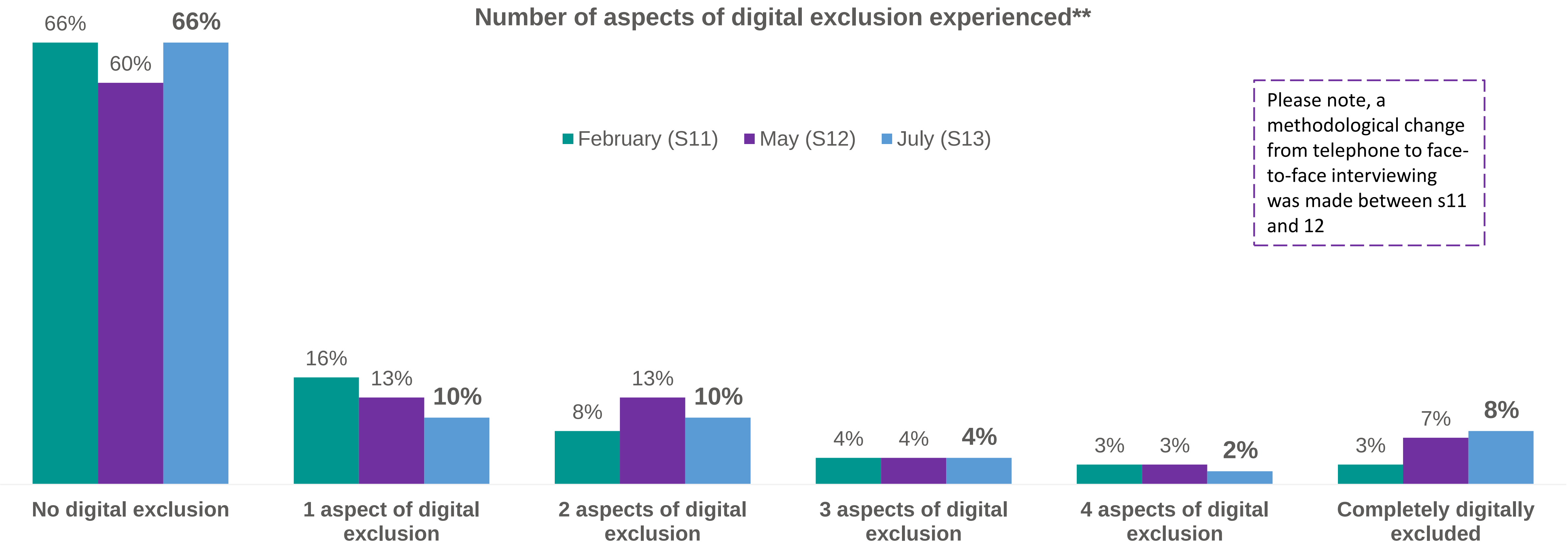
How often do you/do others in your household…?
(Showing households without the access/skills to get online all/most of the time)
February – July 2024

	Total	Aged 16-24 (n=116)	Aged 75+ (n=67)	Disabled respondents (n=146)
…have consistent and reliable access to an internet connection at home?	12%	7%	29% ↑	24% ↑
…have consistent and reliable access to devices that allow access to the internet and use digital services online?	10%	5% ↓	38% ↑	21% ↑
…can afford access to the internet?	14%	11%	35% ↑	29% ↑
…have the skills they need to access and use digital services online?	15%	4% ↓	62% ↑	32% ↑
…have support needed to access and use digital services online?	16%	5% ↓	49% ↑	25% ↑

↑↓ Significantly higher/lower than total

DI_11. How often…? Unweighted base: 760; Survey 11, 259; Survey 12, 251; Survey 13, 250 (Telephone / face to face respondents)

Wave-on-wave trends: July shows an increase in those who are not digitally excluded, with an increase of 6pp since May – this brings us back in line with February's results, however neither change is statistically significant due to small sample sizes

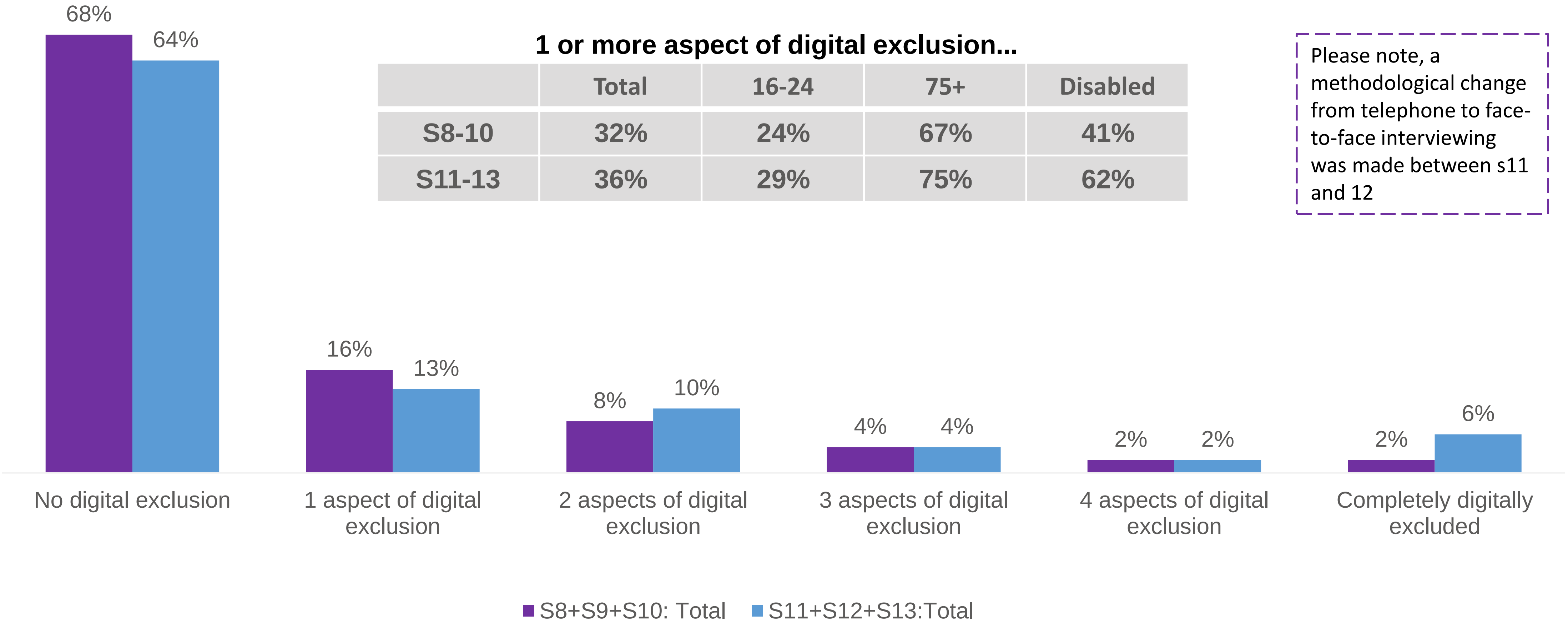


Please note, a methodological change from telephone to face-to-face interviewing was made between s11 and 12

Unweighted base: S11+S12+S13, 760; Survey 11, 259; Survey 12, 251; Survey 13, 250 (Telephone respondents/ 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

Longer term trends: It appears that the proportion of respondents experiencing any form of digital exclusion has increased, however, methodological change is likely to be impacting this data. Respondents aged 75+ or those with a disability report substantially higher levels of digital exclusion

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



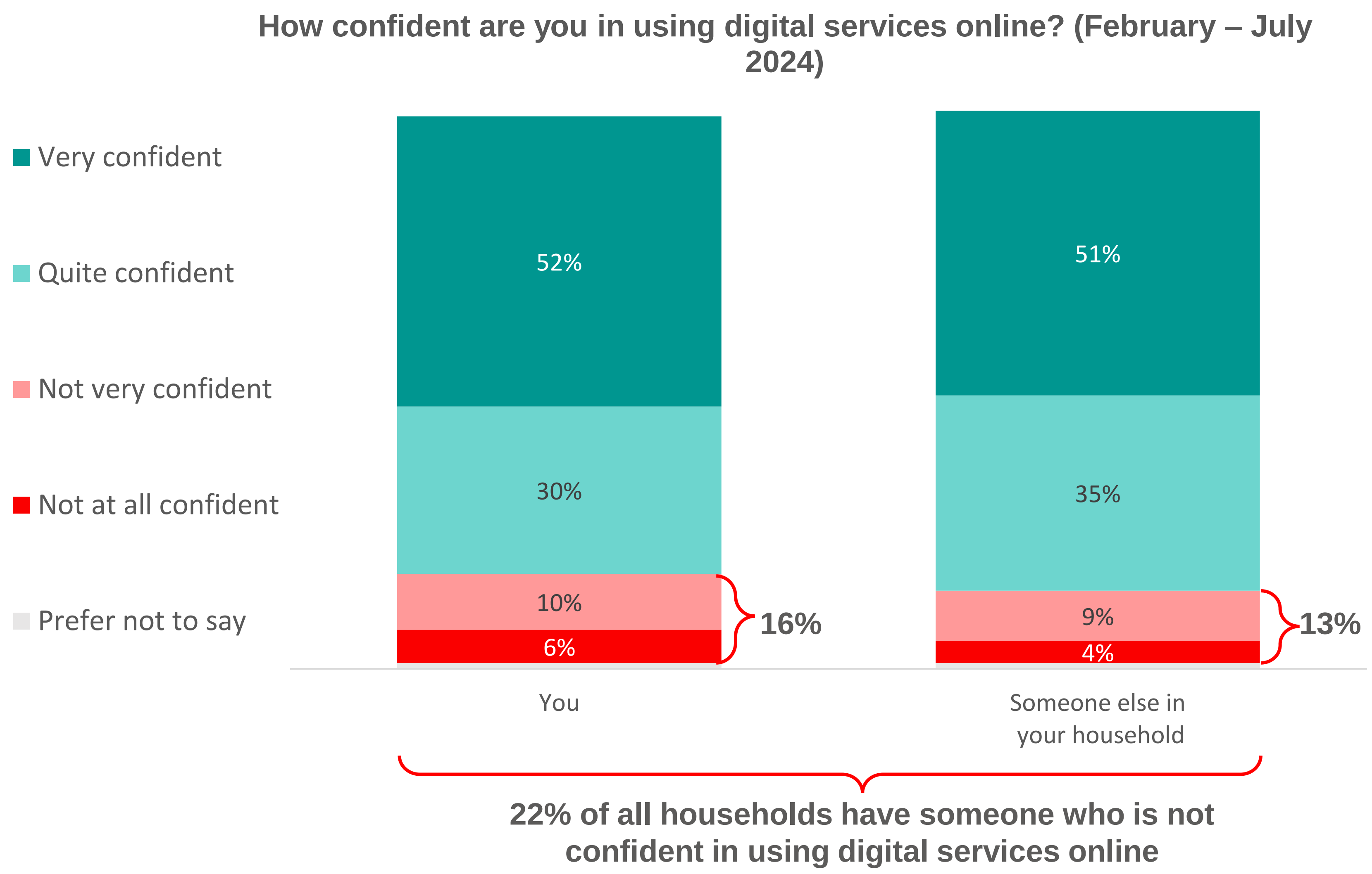
1 or more aspect of digital exclusion...

	Total	16-24	75+	Disabled
S8-10	**32%**	**24%**	**67%**	**41%**
S11-13	**36%**	**29%**	**75%**	**62%**

Please note, a methodological change from telephone to face-to-face interviewing was made between s11 and 12

DI11. How often…? Unweighted base: S8-10 (748), S11-13 (760) (Telephone respondents / Face to Face respondents) Prefer not to say not shown. Question in S6 onwards was asked as a grid, between “you” and “others in your household”. The data on this slide shows the percentages of households where there is someone (either you or others) who has said they are digitally excluded. *Aspects of digital exclusion = consistent and reliable access to an internet connection at home; to devices that allow access to the internet; affording access to the internet; skills needed to access and use digital services online; support needed to access and use digital services online

Just over 1 in 10 respondents say they are not confident using digital services online, with around the same saying others in their household are not confident. Those aged 75+ or 65+ living on their own and disabled respondents are more likely to not be confident.



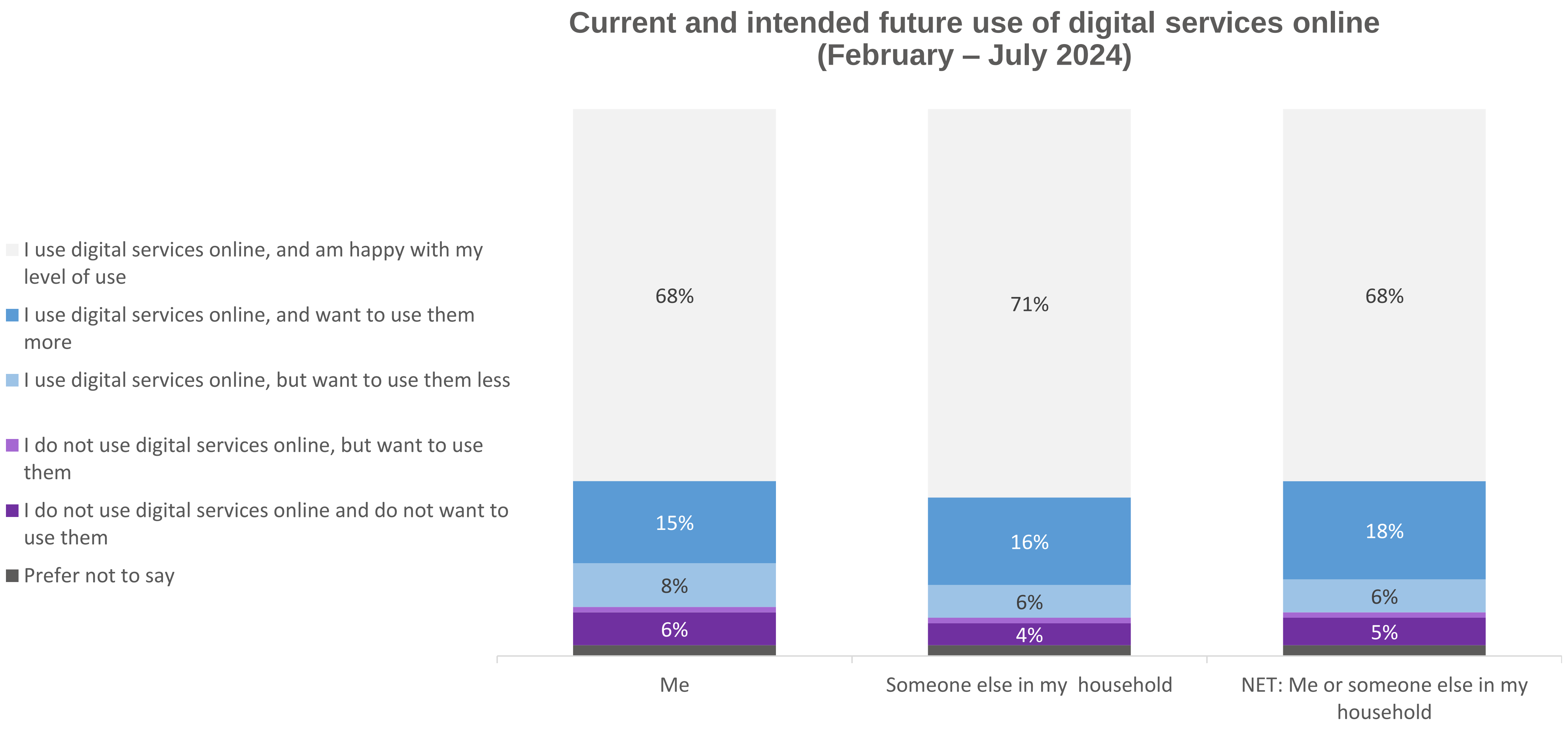
Respondents or someone in their household in the telephone sample more likely to be not very/not at all confident in using digital services online (vs. 18% GM average):

Demographics:

- Those aged 75+ (59%)
- Those aged 65+ and living alone (57%)
- Retired respondents (42%)
- Disabled respondents (33%) including those with a mobility disability (50%)

DI10. Overall, how confident is your household in using the digital services online that it needs and wants?
Unweighted base: 760; Survey 11, 259; Survey 12, 251; Survey 13, 250 (Telephone / Face to Face respondents)

Around 1 in 5 (18%) 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



DI8. How would you describe your current and future intended use of digital services online?
Unweighted base: 760; Survey 11, 259; Survey 12, 251; Survey 13, 250 (Telephone / Face to Face respondents)

Appendix

More detail on changes in survey methodology

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

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

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

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

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

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

Sample information

Survey	1	2	3	4	5	6	7	8	9	10	11	12	13
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
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
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
Total respondents	1385	1467	1677	1636	1470	1767	1488	1612	1560	1546	1460	1551	1540
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%)
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%)
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%)

Key demographics (before weighting applied)

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

Significance Testing and statistical difference – technical note

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

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

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

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

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

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