GREATER MANCHESTER
DOING THINGS DIFFERENTLY

Greater Manchester Residents’ Survey

Survey 15 (main report)

November 2024

Fieldwork conducted 14th – 28th October

Report contents

Introduction and methodology

Background

- This report presents summary findings for a quantitative **survey carried out between 14th and the 28th October 2024, with a representative sample of 1,517 residents** from across all ten Greater Manchester local authority areas.
- The report is divided into themed sections, providing an overview into **respondents' feelings and behaviours around personal health and wellbeing, good work, local area, cost of living and digital access**.
- Data from October 2024 (survey 15) is presented alongside that from similar Greater Manchester resident surveys undertaken in August 2024 (survey 14) and July 2024 (survey 13). 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
  - good work – 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
  - baby banks, early access to education, barriers to financial support – data from survey 15 only is shown as these are new topics
  - cost of living – data from individual surveys is shown separately
  - digital inclusion – merged data for surveys 13, 14 and 15 is used, drawing on face-to-face responses only
- To provide a national comparison, where available, **Greater Manchester findings are presented alongside the most recent benchmarking data from relevant national surveys** – for example, published figures from the Office for National Statistics (ONS) and the Department for Culture Media and Sport (DCMS).
- These surveys are intended to provide regular ongoing insights for Greater Manchester organisations and partners to help inform how and where to target support, communications / engagement activities and resources to improve the lives of Greater Manchester residents.

Methodology

- Between February 2022 and October 2024, BMG Research has undertaken fifteen surveys, each comprising circa 1,500 residents from across Greater Manchester.
- In surveys 1 to 11 the sample was comprised of approximately 750 online panel respondents, 250 telephone respondents, and 500 online ‘river sampled’ respondents (those who responded to adverts, offers and invitations to take part in the surveys).
- **From survey 12 (May 2024) onwards the methodology was revised**, to now include around:
    - 750 online panel respondents
    - 500 online rapid respondents (see Appendix for more details), and
    - 250 face-to-face respondents
- This mix of online and face-to-face surveying was agreed so that the most representative and robust sample of Greater Manchester residents can be regularly sourced within available time and budget. **One of the main reasons the face-to-face element is included is so that those without internet access can take part in the survey. It has replaced the previous telephone approach because analysis suggests those who are truly digitally excluded are less likely to be able to take part by phone.***
- This new methodology will remain consistent for the duration of 2024/25. With four waves of face-to-face methodology now, the degree to which the change in methodology has impacted on results can be understood - 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 1,517 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.

Some of the health and wellbeing questions asked in the survey make up a core set of questions that we have tracked for over a year and will continue tracking in future surveys.

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 fourth 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 MEASURES

This wave included the overall wellbeing measures, along with the relatively new personal wellbeing measures included in the most recent three surveys on hope and fair treatment by society. With three waves worth of data, we can now look at these metrics across the various demographic groups in greater depth than was previously possible

SELF-REPORTED WELLBEING (CONTINUED TRACKING):

- This wave saw the highest level of life satisfaction recorded with 2 in 3 (67%) respondents reporting satisfaction with their life nowadays, an increase since on both August (64%) and July (61%)
- Similarly, 2 in 3 (67%) of respondents feel that the things they do in their life are worthwhile, an increase since August (64%) and the highest level recorded so far
- 5 in 10 (55%) respondents report having high or medium levels of anxiety, the fourth wave in a row that this metric has not changed
- 3 in 5 (60%) report being happy with their lives, slightly lower than August (62%) but in line with July's result (60%)

HOPE AND FAIRNESS (NEWLY INTRODUCED MEASURES FOR S13, S14, AND S15)

- When asked how hopeful respondents feel about their future, three quarters of respondents (76%) reported feeling hopeful overall using merged data from July, August and October, higher than the most recent GB average of 69% (from Sept 2024). Those who feel less hopeful are often those with a disability or those who do not feel they can look after their own health or that they know enough about their own health
- When asked how fairly respondents feel they are treated by society, 17% reported being treated unfairly. This has remained consistent across July (16%), August (17%) and October (17%), during which time it has stayed just above the GB average (13% May, 15% Sept). Those with a disability or those who do not feel in control of their health are again more likely to feel unfairly treated
- New data from this wave has shown that those with low job and pay satisfaction, as well as those who feel that their job does not make good use of their skills are more likely to feel both unhopeful and that society is treating them unfairly

GB benchmarking figures taken from the UK Measures of National Well-being - Office for National Statistics (ons.gov.uk). This figure was published 15 November 2024 and relates to fieldwork undertaken on behalf of ONS between 4 and 29 September 2024.

Health and wellbeing– key findings (2 of 2)

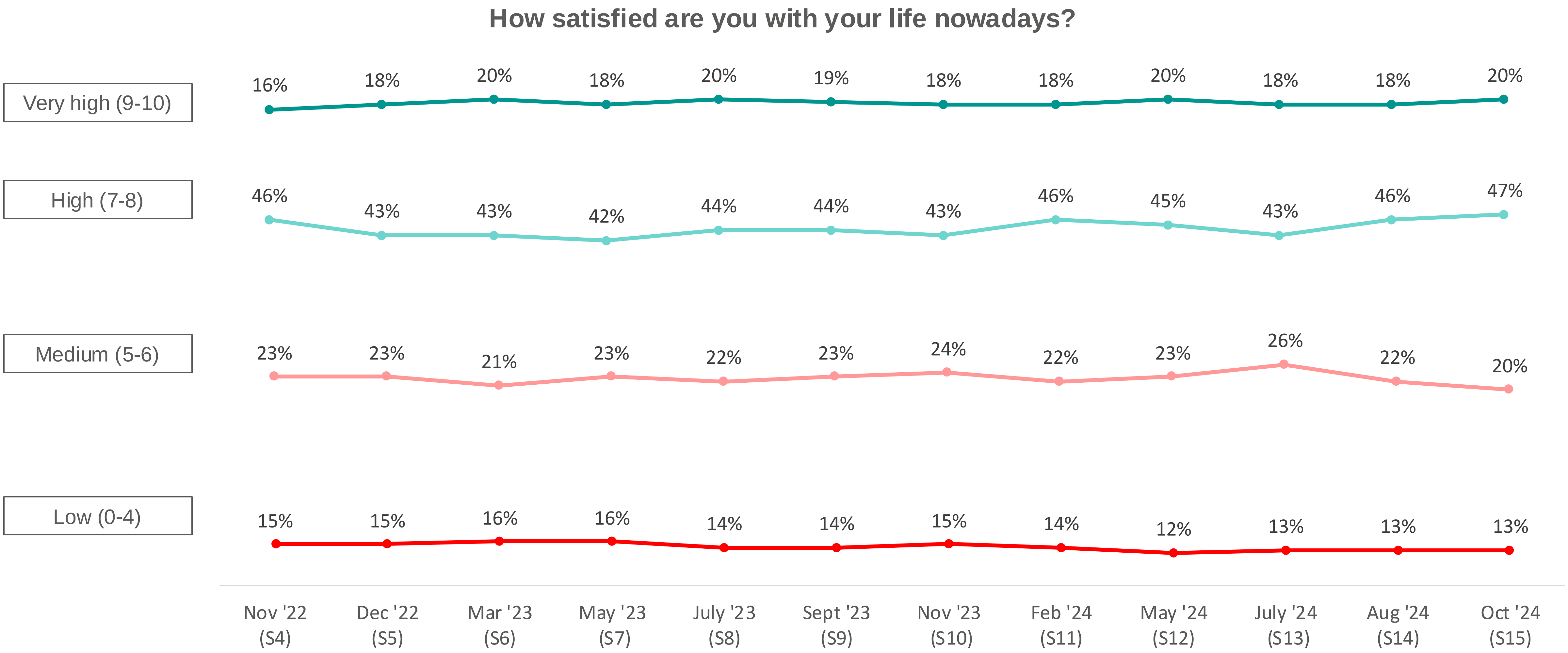
HEALTH CONFIDENCE (CONTINUED TRACKING)

- Greater Manchester recorded a health confidence score of 72.0 this survey, which represents a continued ‘moderate’ level of health confidence among Greater Manchester respondents. This means that the score has remained relatively stable across all of 2024, never lower than 71.4 (Feb and August) and never higher than 72.1 (May).
- This continuity in the overall health confidence score is reflected in the underlying tracking measures as follows:
  - 92% say agree that they are involved in decisions about themselves – similar to the 91% in August (S14)
  - Those agreeing that they can get the right help if they need it has remained stable with 75% agreeing (was 76% in August)
  - 84% agree that they can look after their health – 1 percentage point higher August (S14)
  - Just under 4 in 5 (78%) agree that they know enough about their health – similar to August (80%)
- Disabled respondents recorded a health confidence score of 64.3 representing continued ‘moderate’ level of health confidence among this group. Whilst this is lower than the overall GM score, there has been a positive increase in each of the underlying measures since last asked in August.
- We have explored health confidence among those aged 55+. This age group recorded a health confidence score of 74.9, higher than the score for all ages (72.0) suggesting older respondents are more likely to feel in control of their health

COST BARRIERS TO NHS SERVICES

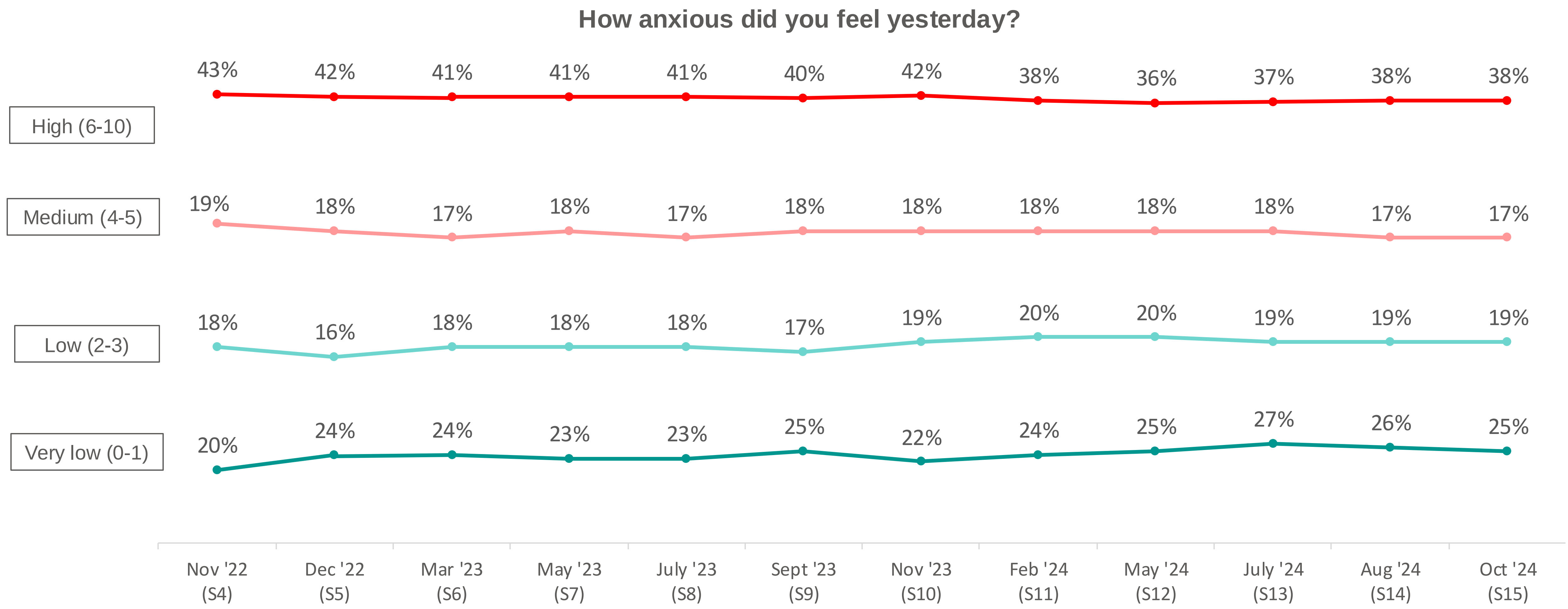
- 1 in 10 (11%) respondents say cost implications have stopped them accessing NHS services in the past month, significantly lower than in August (13%)
- The most common cost implications are a loss of earnings (34%), the cost of taxis (26%) or the costs after the appointment (e.g. prescription costs) (25%). This remains unchanged from August 2024

This wave saw the highest level of life satisfaction recorded so far. However, this is not a major departure from what we've seen across previous waves with there being broad stability in this measure over the long term.



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

Levels of high and medium anxiety have now remained stable for a year – with almost 2 in 5 (38%) reporting high levels and under 1 in 5 (17%) reporting medium levels



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

As with the other measures, those more likely to have low levels of life satisfaction and high levels of anxiety include those with a disability and those who feel unable to look after their own health

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

Demographics:

- Those with a disability (26%), including those with mental ill health (39%), a mobility disability (27%), a sensory disability (26%), or other disability (26%)

Individual and/or family circumstance:

- Those with very low levels of hopefulness (72%), low feelings that life is worthwhile (59%), or low levels of happiness (55%)
- Those who do not feel they can look after their own health (47%) or know enough about their own health (47%)
- Those not in work due to ill health or disability (42%), or have been out of work for 6 months or less (35%)
- Those dissatisfied with their local area (33%)
- Those who have been treated unfairly by society (31%)
- Those who are not satisfied with their job (29%) or their pay (21%)
- Those who feel lonely at least some of the time (28%)
- Those who are financially vulnerable (25%)
- Those with a household income below £16k (24%)
- Those who are renting (19%)
- Those who have not been involved in a club or group in the last year (16%)

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

Demographics:

- Those with a disability (52%) including those with mental ill health (68%), a learning disability (67%), a sensory disability (59%)
- Those who are bisexual (51%)
- Those aged 16-24 (47%), in particular women in this age group (55%)

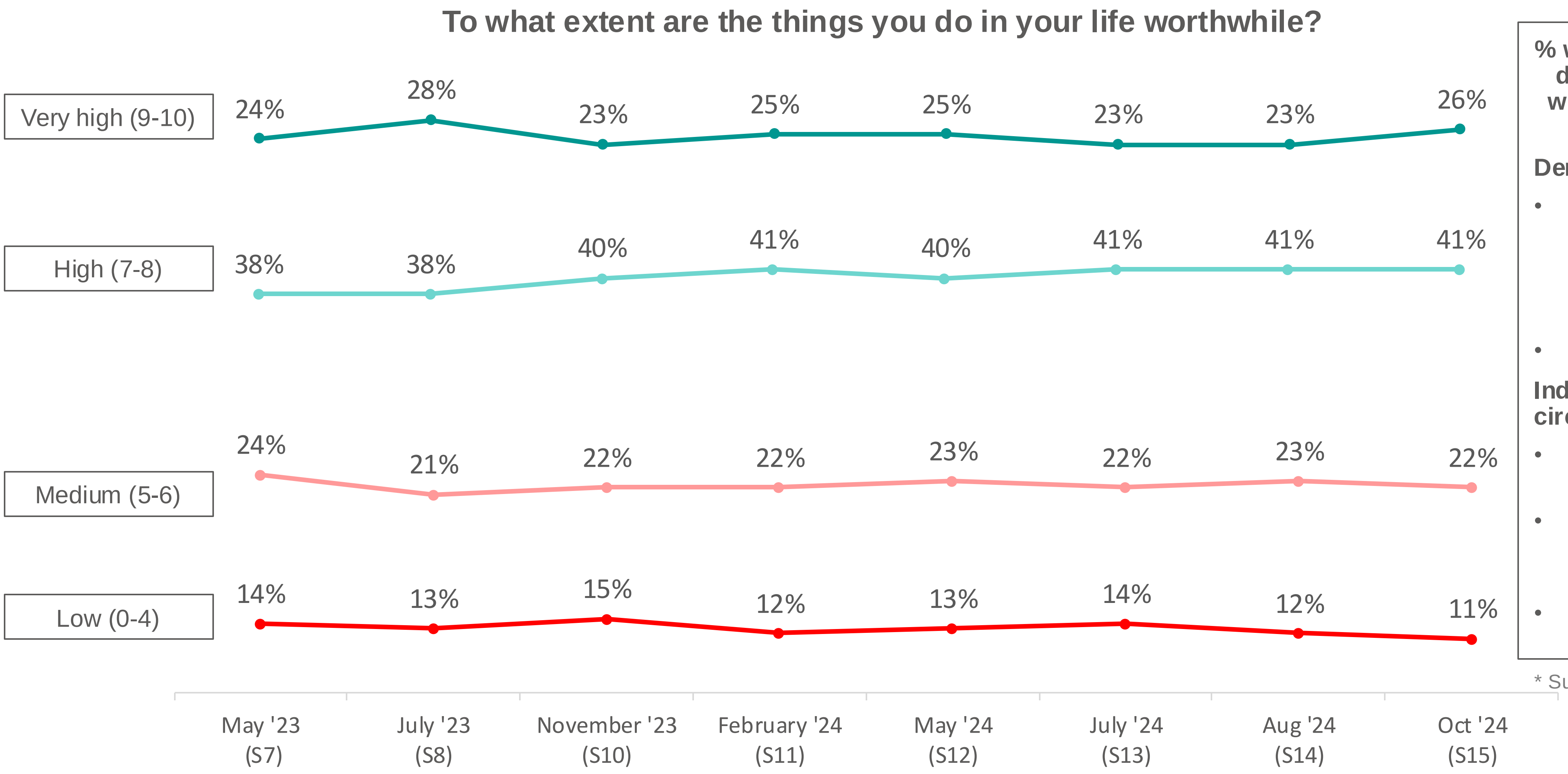
Individual and/or family circumstance:

- Those with very low levels of hopefulness (67%), low levels of happiness (65%), low levels of life satisfaction (64%), or feel lonely at least some of the time (60%)
- Those who do not feel they can look after their own health (65%) or know enough about their own health (65%)
- Those not in work due to ill health or disability (58%)
- Those who are not satisfied with their job (55%) or their pay (50%)
- Those who have had to borrow money or use more credit in the last month (50%)
- Those who feel they are treated unfairly by society (50%)
- Those who find it difficult to afford their mortgage (50%), or their rent (45%)
- Those living for free with friends or family (48%)
- Those who are currently carers (46%)
- Those who find it difficult to afford their energy bills (45%)

* Subgroup analysis uses merged data from S13, 14 and 15 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 13-15, 4539

Greater Manchester respondents were more likely to feel that the **things they do in life are worthwhile** than at any other point this question has been tracked. However, disabled respondents and those on low incomes continue to be less likely to feel that this is the case



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

Demographics:

- Those who have a disability (23%), including mental ill health (33%), a sensory disability (24%) or learning / mobility disabilities (23%)
- Those aged 16-24 (15%)

Individual and/or family circumstance:

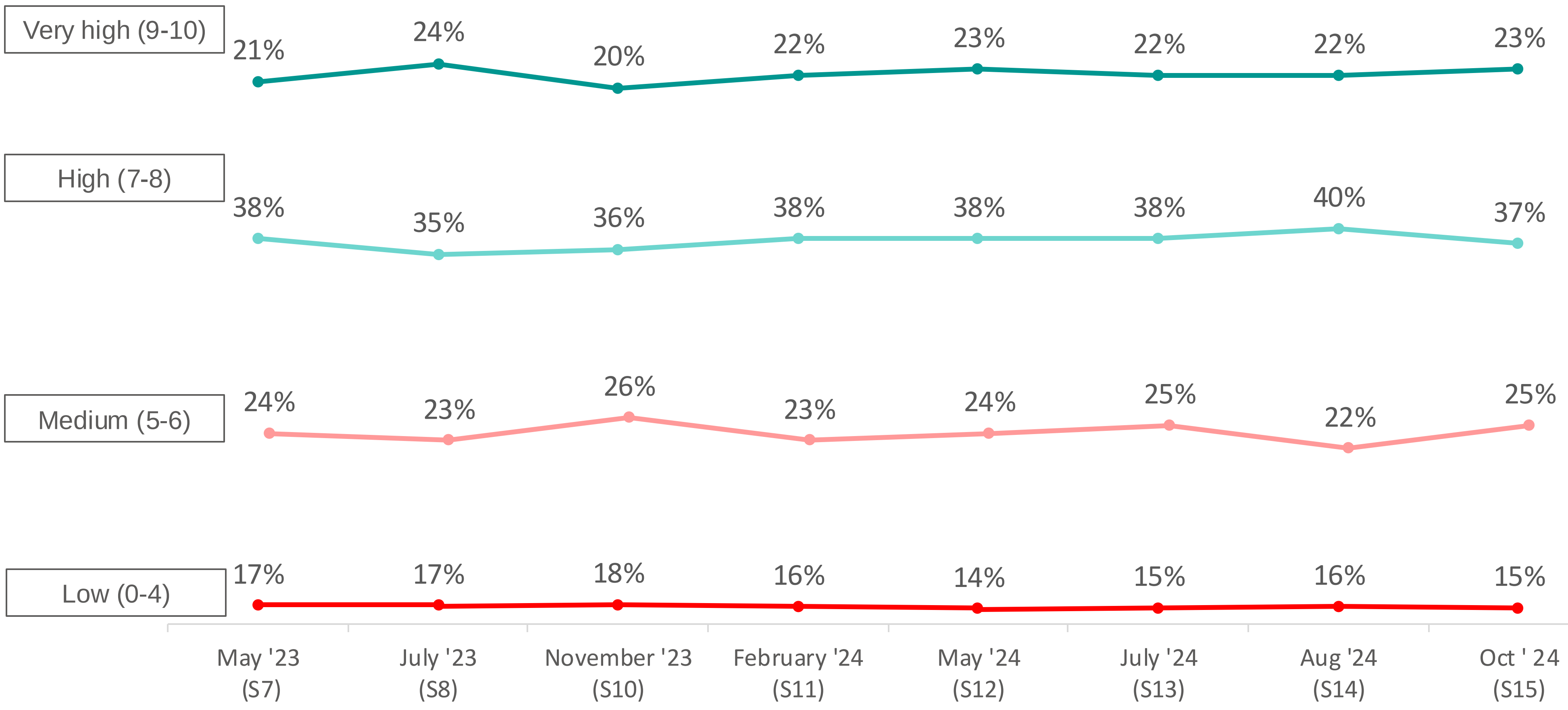
- Those with a household income below £16k (21%)
- Those who have been out of work for 6 months or more (25%)
- Those who rent their home (16%)

* Subgroup analysis uses merged data from S13-15

Q10. Overall, to what extent do you feel that the things you do in your life are worthwhile, on a scale of 0 to 10, where 0 is "not at all" and 10 is "completely"? / Unweighted base: (All respondents) S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517. Thresholds are applied to responses to convert the 11-point scale into the categories shown. Unweighted base: S13-15 = 4539 (All respondents).

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

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 (28%), including those with mental ill health (41%), a mobility disability (28%) or other disability (28%)
- Those who are not heterosexual (19%)
- Those aged 25-44 (17%)

Individual and/or family circumstance:

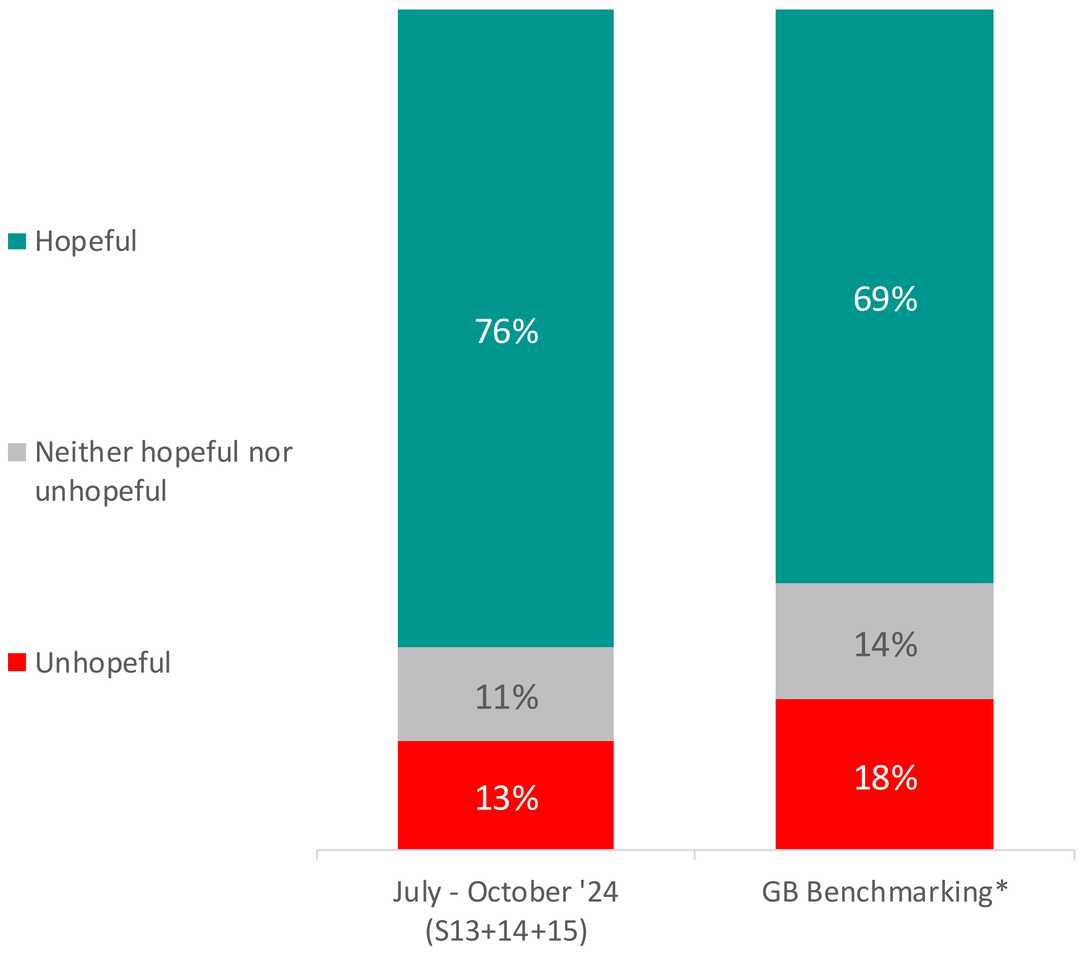
- Those not in work due to ill health or disability (43%)
- Those with a household income of below £16k (26%)

* Subgroup analysis uses merged data from S13-15

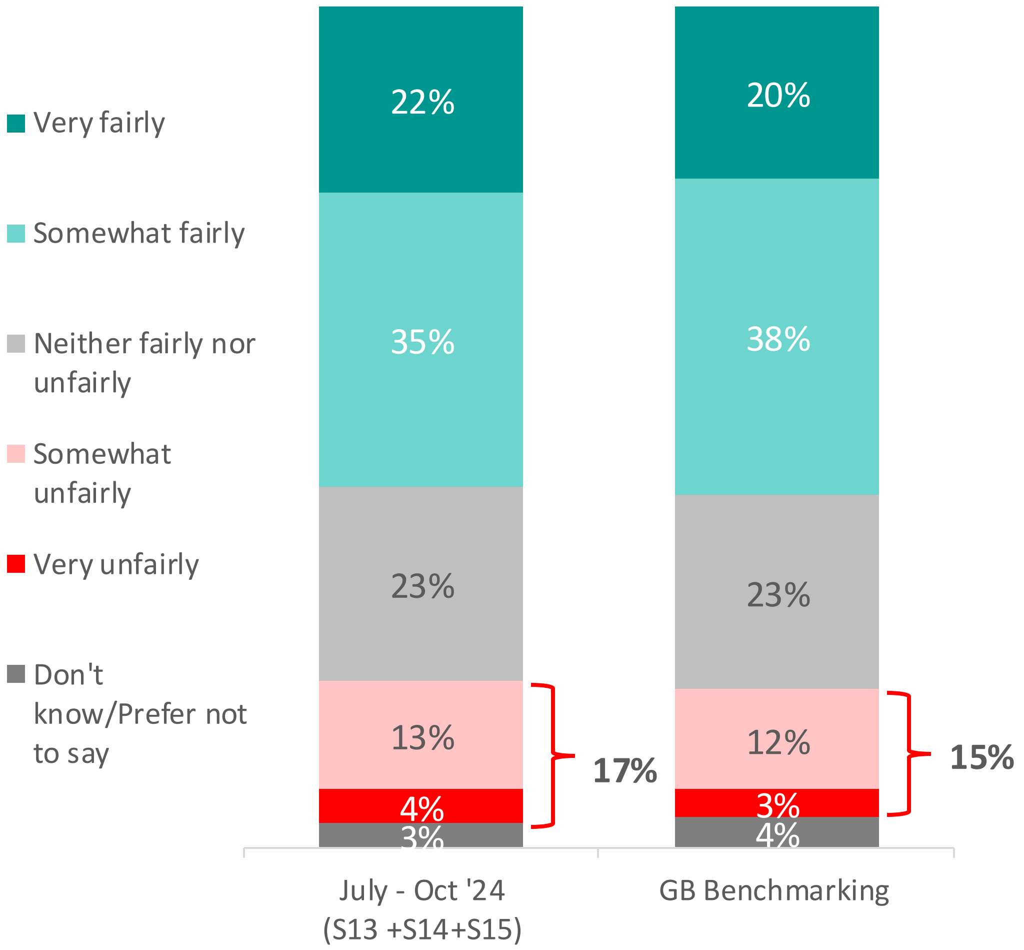
Q11. Overall, how happy did you feel yesterday, on a scale of 0 to 10, where 0 is “not at all” and 10 is “completely”? S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517. Thresholds are applied to responses to convert the 11-point scale into the categories shown.
Unweighted base: Greater Manchester Residents Survey 13-15: 4539 (All respondents)

Since July, 76% of GM respondents have reported high levels of hopefulness about their future, higher than the GB average of 69%. However, over the same period 17% feel they are treated unfairly by society – slightly higher than the 15% across GB

How hopeful do you feel about your future?



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



A3. Overall, how hopeful do you feel about your future, where 0 is 'not at all hopeful' and 10 is 'completely hopeful'? A4. How fairly or unfairly do you feel you are treated by society?
Base: Surveys 13+14+15, 4539. GB benchmarking taken from UK measures of wellbeing (fieldwork period 4 to 29 September 2024) *Figure 66% in national figures, rebased for reporting purposes here

Those more likely to feel unhopeful, or feel they are treated unfairly by society include who are not satisfied with their pay or job, or those who have been out of work for 6 months or more. Those who do not feel they can look after their health or who have a disability continue to feature prominently

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

New subgroups found in analysis:

- Those who are not satisfied with their job (30%), or with their hours (23%), or their pay (21%)
- Those who have been out of work for 6 months or more (37%), and those who have been out of work for less than 6 months (23%)
- Those who feel their job does not make use of their skills (26%)

Subgroups that continue to feature significantly:

- Those with low levels of life satisfaction (61%) and low feelings that life is worthwhile (60%)
- Those who do not feel they can look after their own health (52%) or know enough about their own health (52%)
- Those with a disability (27%) including mental ill health (38%), or a sensory disability (30%), or a mobility disability (29%)
- Those who feel they are treated unfairly by society (32%)
- Those who would not recommend their local area as a place to live (30%)

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

New subgroups found in analysis:

- Those with low levels of hopefulness (39%)
- Those who work as sole traders (37%)
- Those who are not satisfied with their pay (31%), or with their job (25%),
- Those who identify as a gay woman or lesbian (31%)
- Those who have been out of work for 6 months or more (29%)
- Those who feel their job does not make use of their skills (25%)

Subgroups that continue to feature significantly:

- Those who do not feel they can look after their own health (50%) or know enough about their own health (50%)
- Those with very low levels of hopefulness (39%), and low levels of life satisfaction (40%)
- Those dissatisfied with their local area (40%)
- Those with a disability (29%), including those with mental ill health (35%), or a sensory disability (32%), or mobility disability (30%)
- Those with low levels of happiness (36%)
- Those not in work due to ill health or disability (33%)
- Those who are financially vulnerable (28%)

* Subgroup analysis uses merged data from S13, S14 and S15 combined

A3. Overall, how hopeful do you feel about your future, where 0 is 'not at all hopeful' and 10 is 'completely hopeful’? A4. How fairly or unfairly do you feel you are treated by society?
Unweighted base: Greater Manchester Residents Surveys 13-15, 4539

The overall Health Confidence Score (HCS) suggested in the October 2024 fieldwork is 72.0 out of 100 representing 'moderate' health confidence across GM. This is similar to the August 2024 figure (71.4 out of 100).

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

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

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

Access
66.6
+0.5
(since August)
'I can get the right help if I need it'

Knowledge
68.1
+0.4
(since August)
'I know enough about my health'

Self-management
71.4
+0.8
(since August)
'I can look after my health'

Shared decision
81.9
+0.7
(since August)
'I am involved in decisions about me'

Overall Greater Manchester health confidence score (out of 100)

72.0

This is

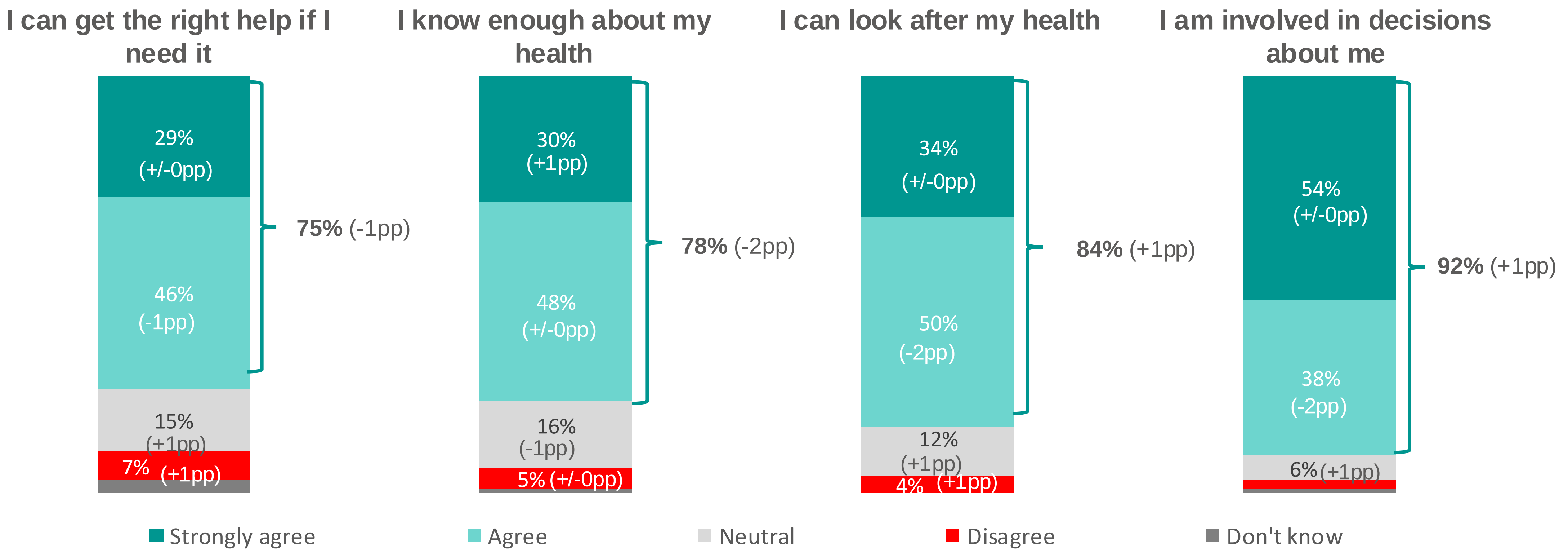
+0.6

points higher than in August 2024

Wave	HCS
7	70.5
8	71.8
9	71.5
10	70
11	71.4
12	72.1
13	71.6
14	71.4
15	72.0

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

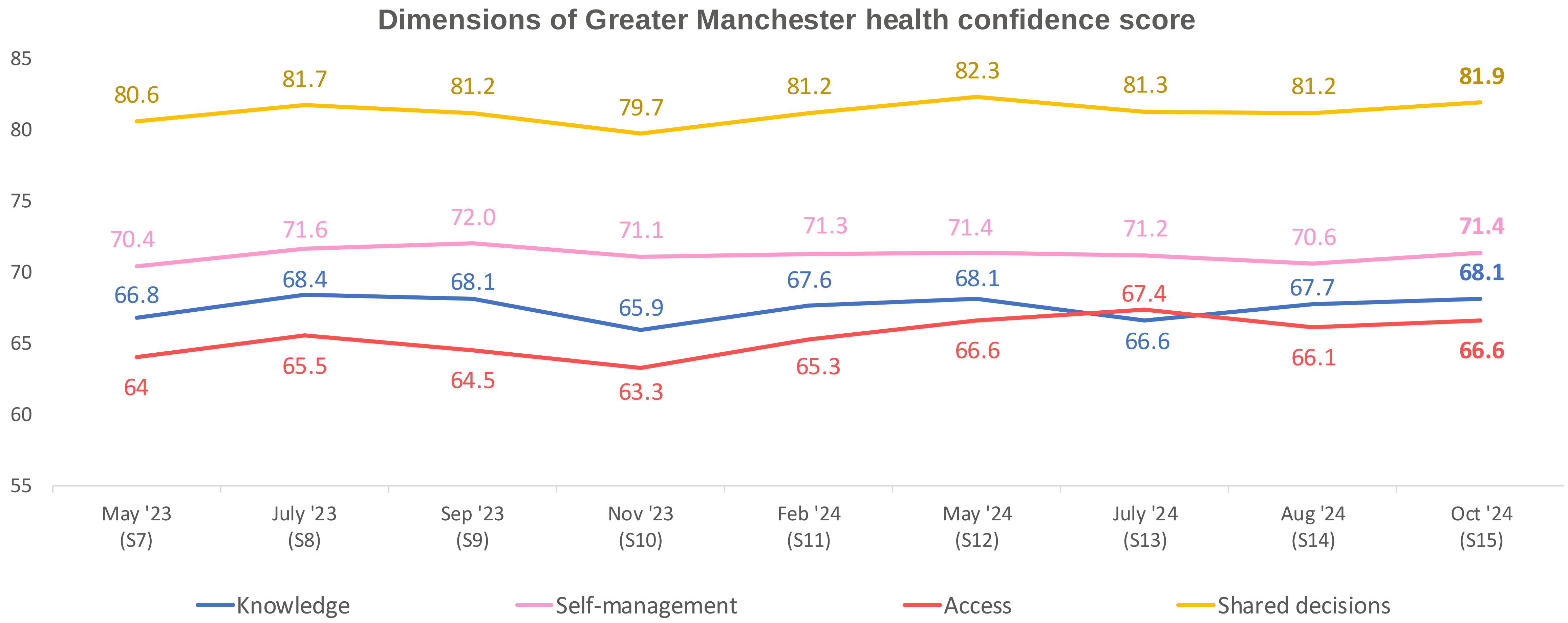
Our data exploring whether respondents agree that they can manage their health – those with "health confidence" – continues to show a stable and positive outlook. Comparisons to August 2024 show no statistically significant changes, and only knowledge about their health has seen a slight decline of 2 percentage points



Figures in brackets show change since August (S14)

S14. To what extent do you agree or disagree with the following statements?
Unweighted base: All respondents Survey 15, 1517 (All responses)

Our data exploring whether respondents agree that they can **manage their health** – those with "health confidence" – continues to show a stable and positive outlook. All four metrics of the **Health Confidence Score** have stayed relatively consistent since August 2024



An overall health confidence score is calculated based on responses to four questions, each covering one of four dimensions – access, knowledge, self-management, shared decisions. On a 0-100 scale, scores between 60-79 are interpreted as moderate, scores between 80-100 are interpreted as high

S14. To what extent do you agree or disagree with the following statements?
Unweighted base: All respondents; Survey 7, 1488; Survey 8, 1612; Survey 9, 1560; Survey 10, 1546; Survey 11, 1460; Survey 12, 1,551; Survey 13, 1540; Survey 14, 1482; Survey 15, 1517

Among disabled respondents, the Health Confidence Score (HCS) is 64.3 out of 100 – lower than the overall GM score of 72.0 but representing an increase since it was last asked in August

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

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

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

Access	Knowledge	Self-management	Shared decision
58.5	62.2	59.0	77.5
+2.3 (vs. GM)	+4.9 (vs. GM)	+1.7 (vs. GM)	+5.0 (vs. GM)
‘I can get the right help if I need it’	‘I know enough about my health’	‘I can look after my health’	‘I am involved in decisions about me’

Overall Greater Manchester health confidence score (out of 100)

64.3

This is

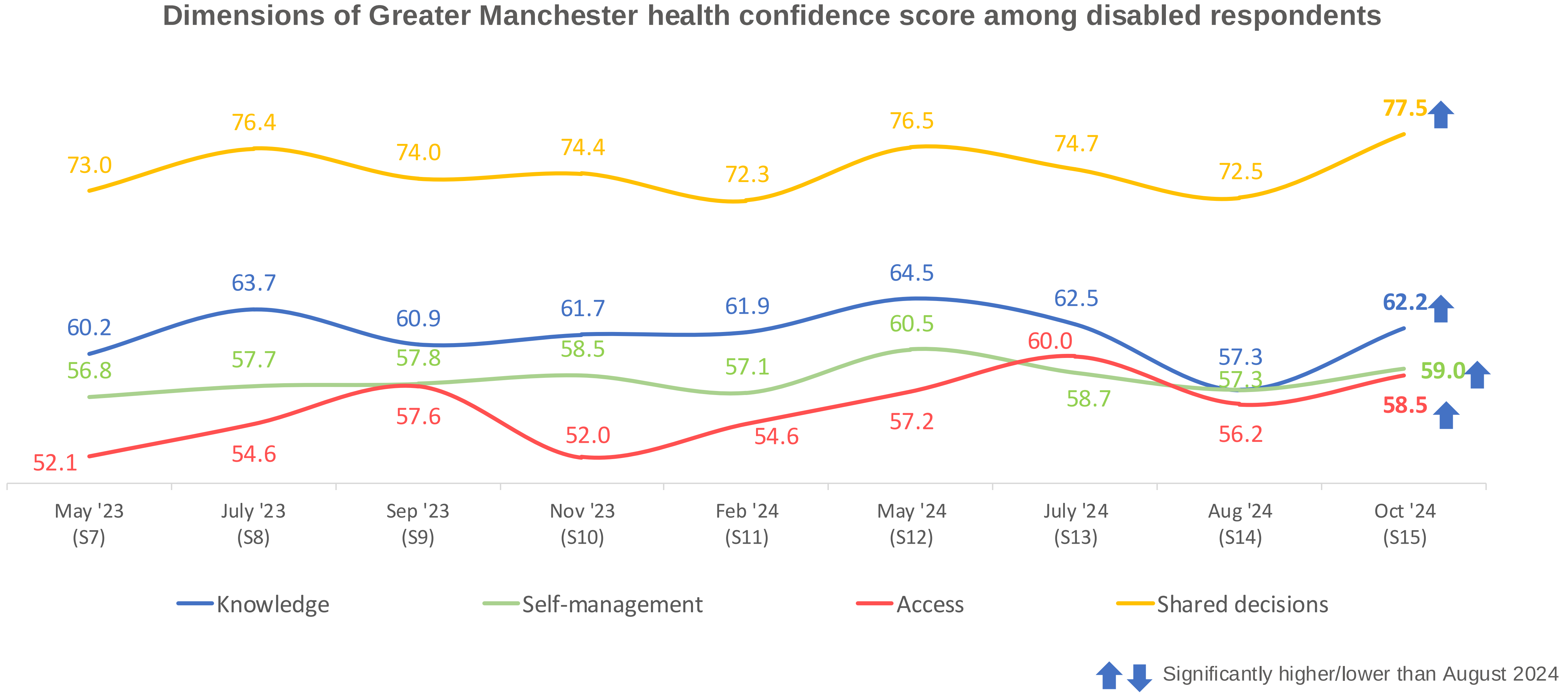
-7.7

points lower than in the overall GM score

Wave	HCS
7	60.5
8	63.1
9	62.6
10	61.7
11	61.5
12	64.7
13	64.0
14	60.8
15	64.3

S14. To what extent do you agree or disagree with the following statements?
Unweighted base: All respondents Survey 15, 1517 (Valid responses)

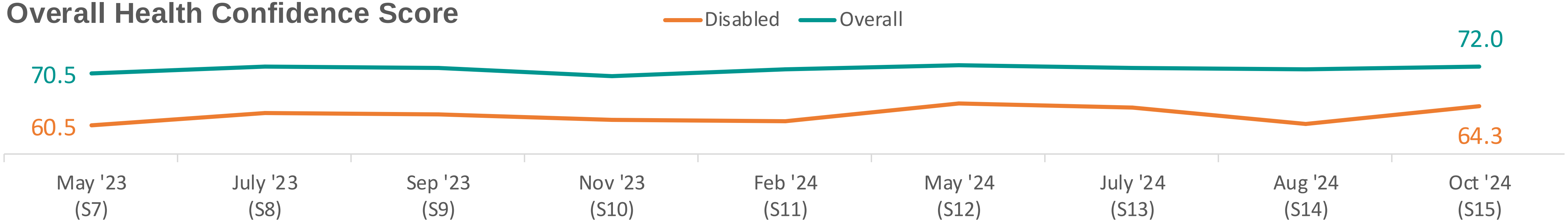
The health confidence score among disabled respondents has fluctuated a lot more recently. This wave, factors have significantly increased, after all decreasing last wave. In particular, October has recorded the highest ever shared decisions score



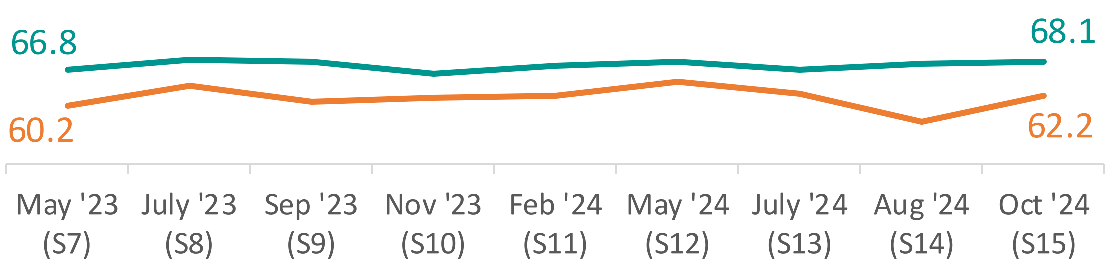
S14. To what extent do you agree or disagree with the following statements?
Unweighted base: All disabled respondents; Survey 7, 374; Survey 8, 417; Survey 9, 412; Survey 10, 385; Survey 11, 346; Survey 12, 394; Survey 13, 416; Survey 14, 370; Survey 15, 398

The overall health confidence score continues to remain lower for disabled respondents than for the general population, but this gap has narrowed since August across all dimensions

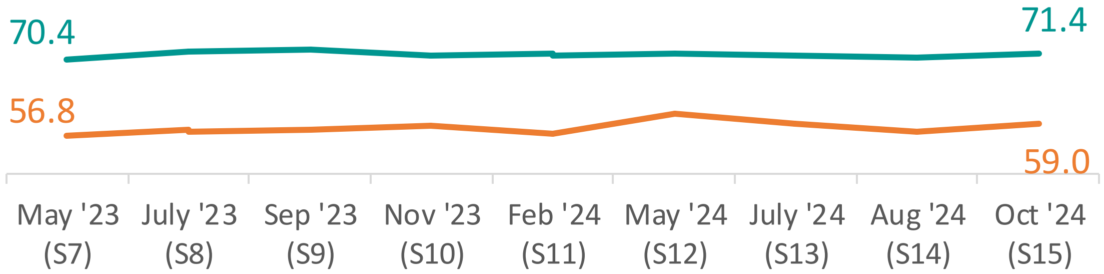
Overall Health Confidence Score



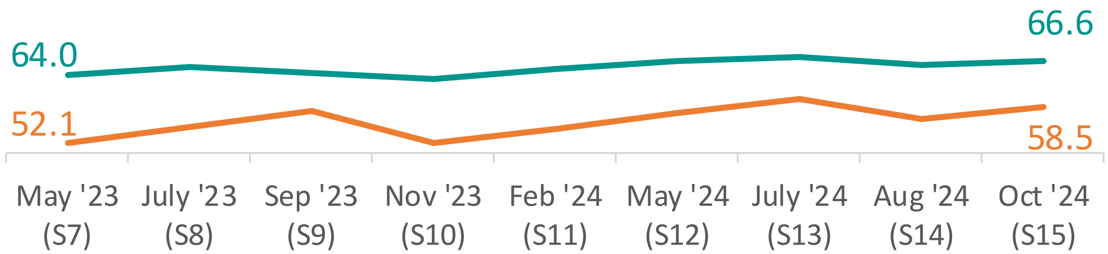
Knowledge



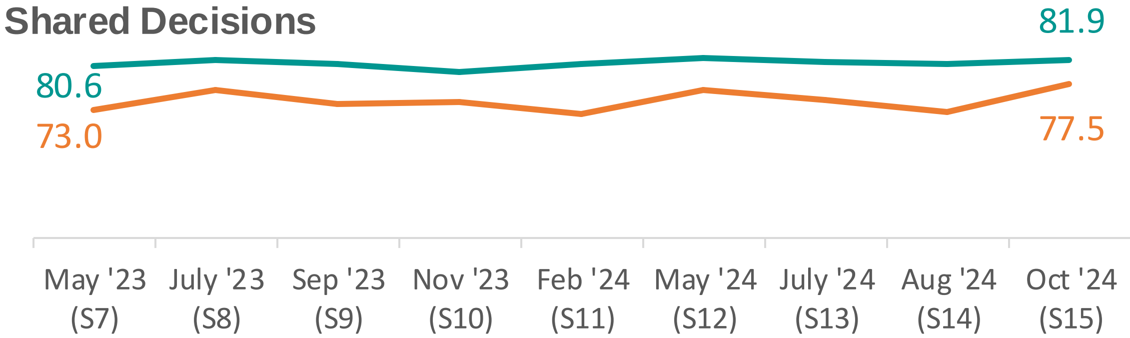
Self-Management



Access



Shared Decisions



S14. To what extent do you agree or disagree with the following statements?
Unweighted base: Survey 15, 1517 (All responses); 398 (Disabled respondents)

This wave we have also looked specifically at older respondents aged 55+. These residents have a higher-than-average level of health confidence compared to respondents as a whole – reported at 74.9 out of 100, higher than the overall GM score of 72.0

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

Access
72.2
+4.1 (vs. GM)
'I can get the right help if I need it'

Knowledge
73.9
+2.5 (vs. GM)
'I know enough about my health'

Self-management
69.7
+3.1 (vs. GM)
'I can look after my health'

Shared decision
83.9
+2 (vs. GM)
'I am involved in decisions about me'

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

Overall Greater Manchester health confidence score (out of 100)

74.9

This is

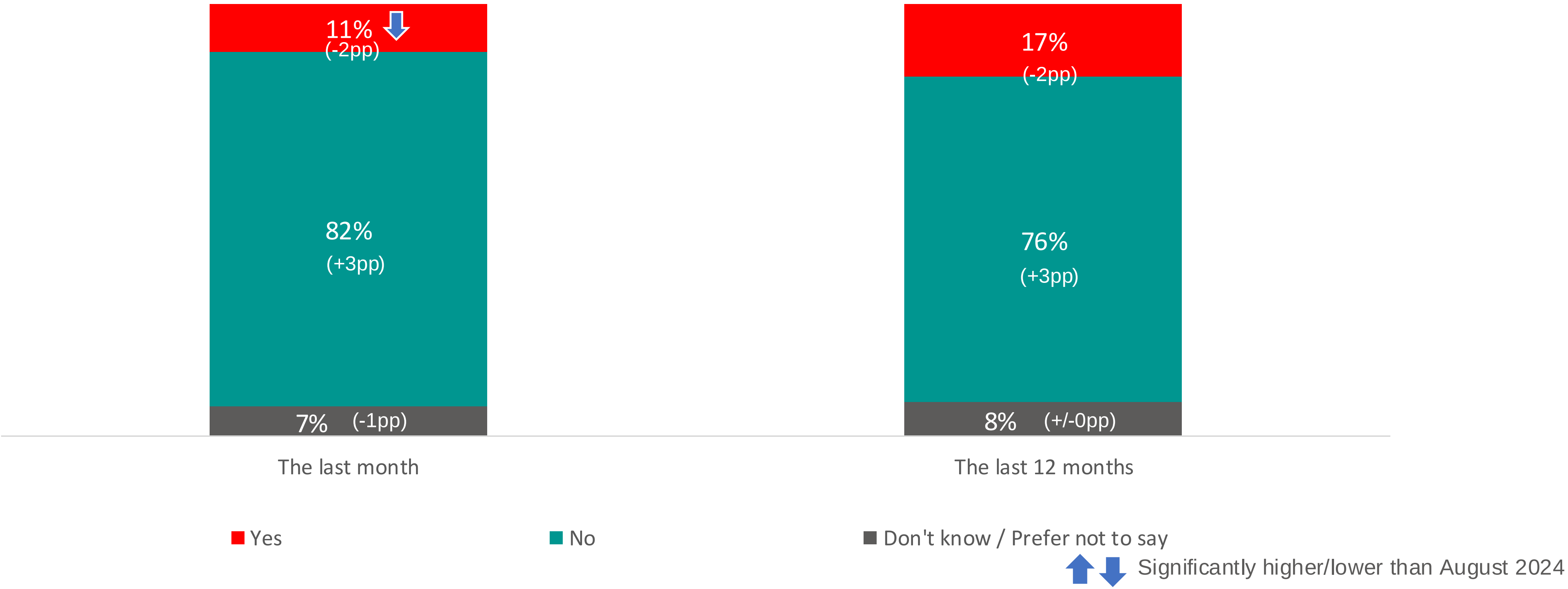
+2.9

points higher than in the overall GM score

S14. To what extent do you agree or disagree with the following statements?
Unweighted base: All respondents Survey 13-15, 4539 (Valid responses)

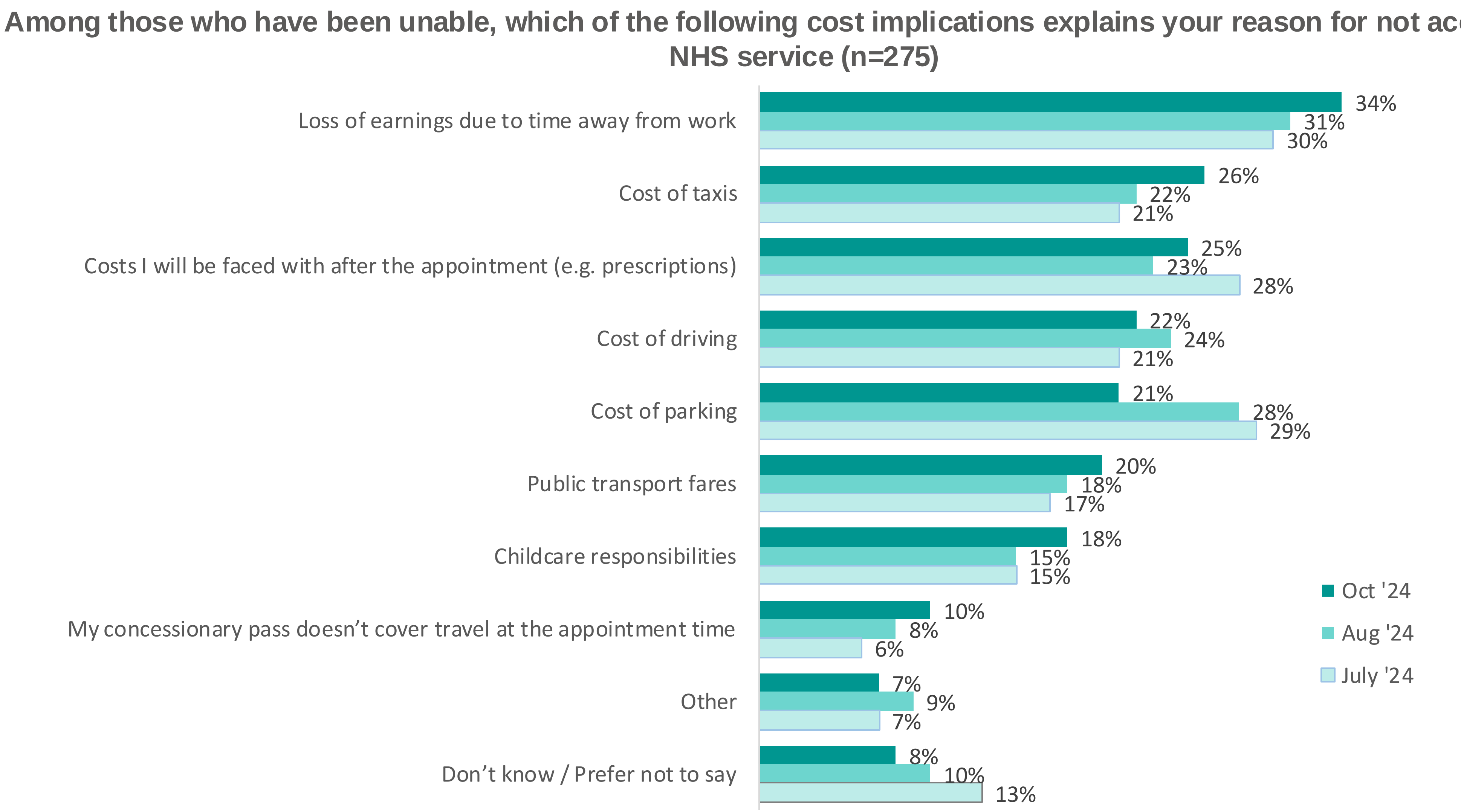
1 in 10 (11%) respondents say cost implications have stopped them accessing NHS services in the past month, significantly lower than in August (13%)

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



NHS4. Have you found [stated situation] has been an issue for you in...? QNHS5. Which of the following cost implications best describes your reason for not accessing an NHS health and/or social care service? Base: All respondents, S13, 1540; S14, 1482 All who have been unable to access NHS services due to cost implications, S14, 306; S15, 275

Loss of earnings, cost of taxis and costs after the appointment are the most common barriers – though various other barriers have been referenced to varying degrees since we first asked this question in July



QNHS5. Which of the following cost implications best describes your reason for not accessing an NHS health and/or social care service?
Base: All who have been unable to access NHS services due to cost implications, S13, 368; S14, 306; S15, 275

Good Work

Good work – Overview and context

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

This section shows data from Survey 15 (August 2024), Survey 11 (February 2024), Survey 8 (July 2023). The results highlight potential trends and indicators which individual localities will, in time, be able to explore in greater detail.

Good work – key findings (1 of 2)

CONTEXT – CURRENT EMPLOYMENT OR CONTRACT SITUATION

- 878 respondents within the overall residents' survey sample are employed, over half (57%) of the total sample of 1,518. The majority of employed residents are employed in permanent full-time positions (63%). 17% are in permanent part-time positions. Of the remaining respondents, 6% are self-employed sole traders, and 5% are on a fixed term contract.

JOB SATISFACTION

- Job satisfaction has decreased since February 2024 (when related questions were last asked) – with those saying they are satisfied decreasing to 64% (from 68%). This puts the result back in line with the levels seen in July 2023
- However, satisfaction with pay has increased over the same period (to 50%, was 46% in February 2024), again returning to similar levels to July 2023
- Meanwhile, satisfaction with working hours has remained in line with February 2024, at 69%, slightly higher than in July 2023 (66%)

INFLUENCE AND FLEXIBILITY

- People's ability to influence their work has largely remained in line with February 2024 – and with a slight increase in those saying they don't have influence in the pace of their work (20%, was 18%) and those saying they don't have any influence on what to do next (16%, was 14%)
- However, experiences relating to flexibility have improved, with 1 in 3 (34%) saying it is difficult to arrange an hour or two off during work hours for personal or family matters – significantly lower than in February 2024 (41%)
- A slightly higher proportion (45%) say that it is difficult to ask to vary their working hours, however this is not significantly different to in February 2024 (49%)

Good work – key findings (2 of 2)

PERSONAL DEVELOPMENT

- 4 in 5 (84%) say their job requires them to learn new things at least sometimes. Only 1% say they never have to learn something new
- Three quarters (73%) agree their job makes good use of their skills and abilities, though 13% disagree
- Three quarters (73%) of employed respondents say they have been given a professional development or training opportunity in the last 12 month (35% were given 1-2 opportunities, while 9% were given more than 6 opportunities). Conversely, one in five (22%) reported no professional development or training opportunities
- Those working in the private sector are more likely to say they have not received any training opportunities (27%), whilst those in the public sector are more likely (12%) to have received more than 6 opportunities

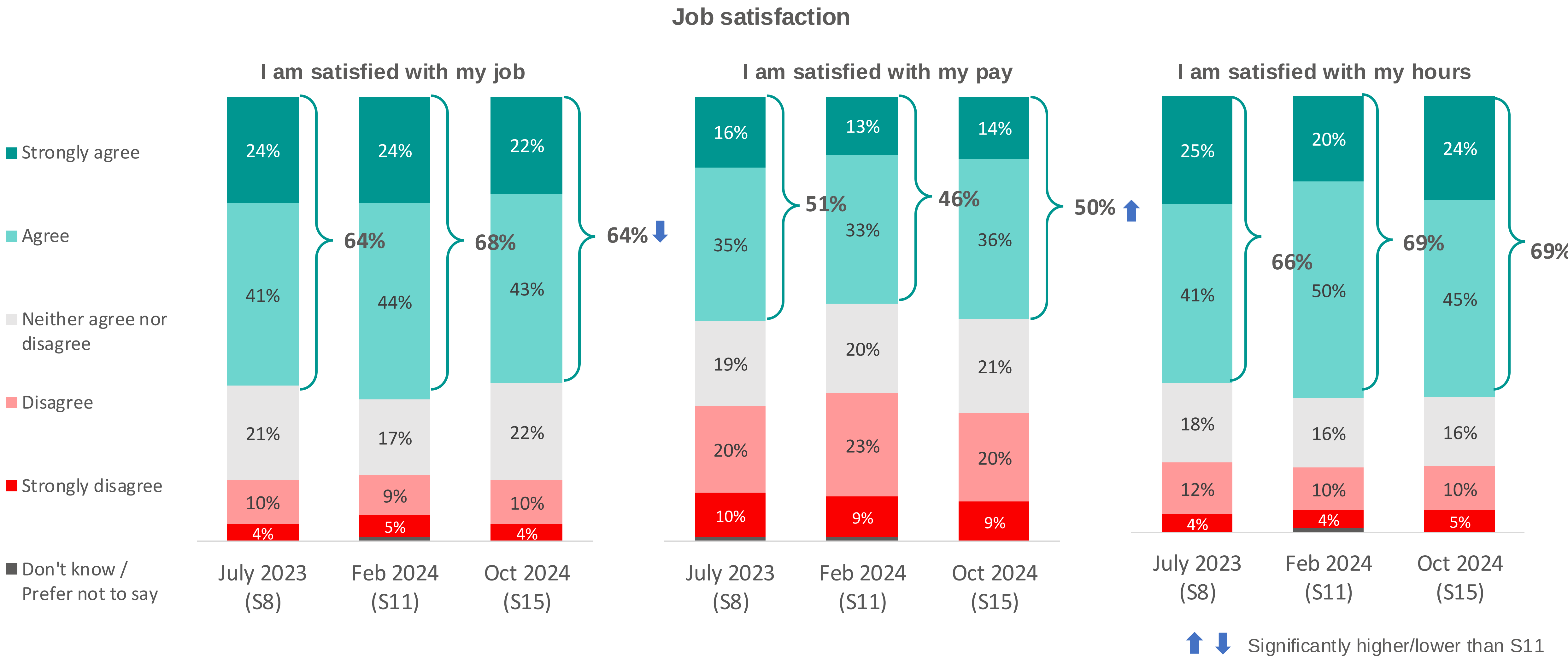
OVERTIME AND WELLBEING

- Almost 2 in 3 (62%) say they sometimes full-time work beyond their contracted hours. Whilst 13% say they never have to do this, 11% say they always have to do this. This is higher among parents, and those who feel they are at risk of unemployment
- In a similar vein, three quarters (76%) say their job frequently involves high levels of stress or pressure at least sometimes. 13% say this is always the case.
- This is higher among those with high levels of anxiety and those with a full-time job

JOB SECURITY

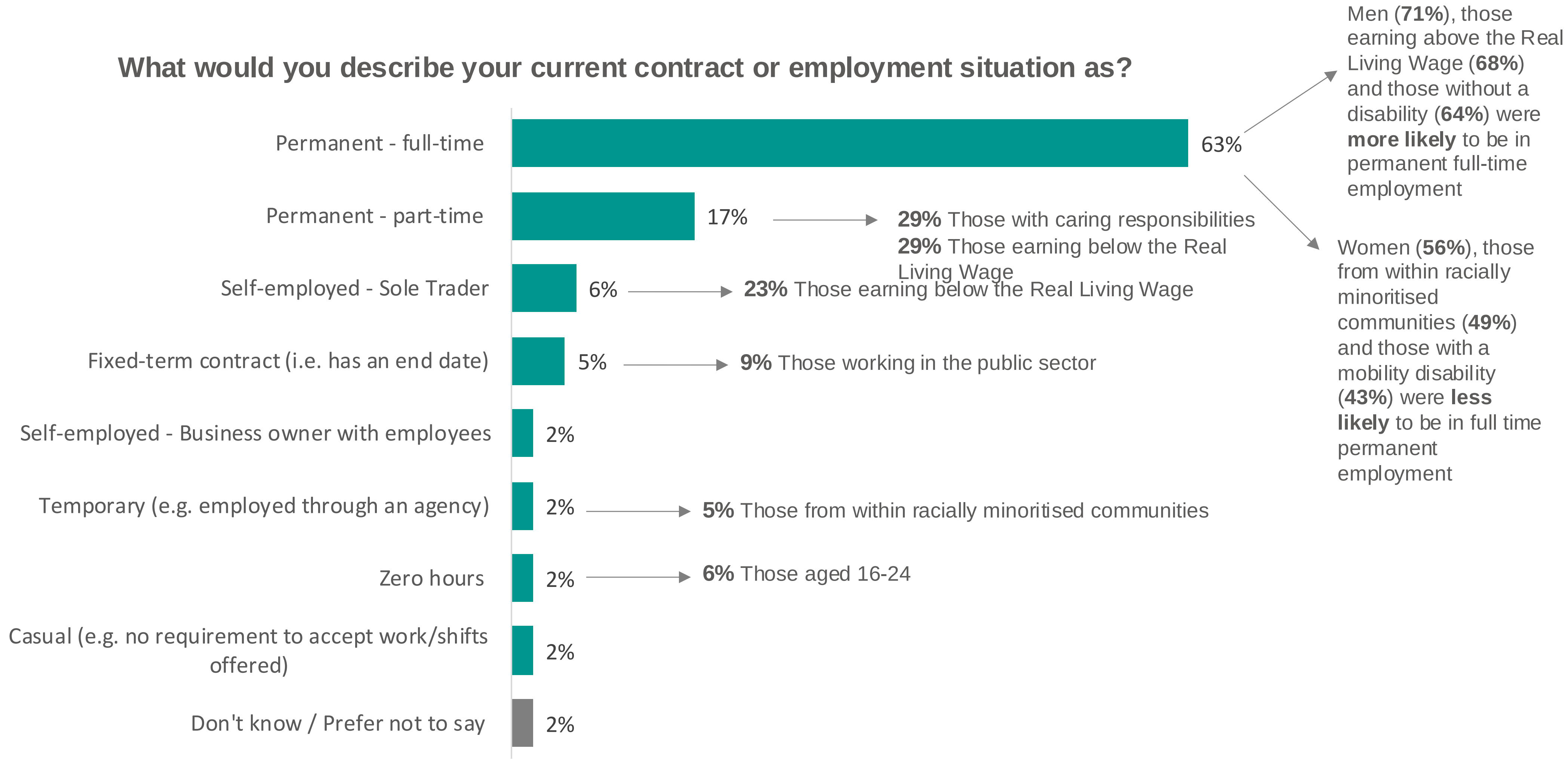
- Around 1 in 6 respondents (13%) have concerns around job security, saying they feel there is some likelihood they will lose their job over the next year, however, this is significantly lower than February 2024 (16%). Those with a disability (31%), those who are Asian or Asian British respondents (25%) and those aged 16-24 (31%) are more likely to think they will lose their job

Job satisfaction has significantly decreased since February 2024 (64% cf. 68%), though in the same period satisfaction with pay has significantly increased (50% cf. 46%). Satisfaction with hours remains stable at two thirds of respondents (69%)



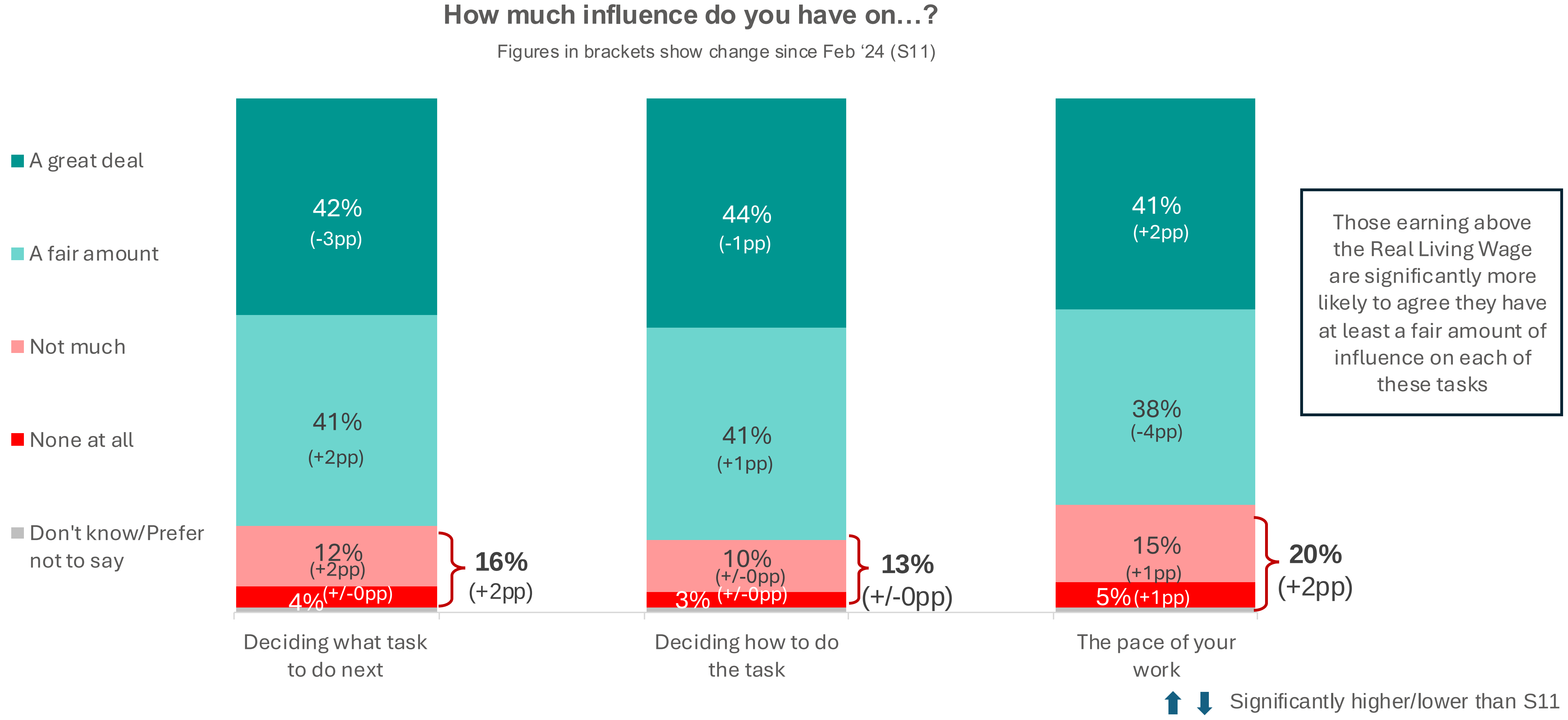
GW8. How much do you agree or disagree with the following statements?
Base: All employed residents; 859 (S8), 1004 (S11), 878 (S15)

Just under two thirds (63%) of respondents are employed in permanent positions – with a further 17% in part-time positions



GW2_4. What would you describe your current contract or employment situation as? Base: Those who are employed (878).

There has been no significant change since February 2024 of employed respondents being unable to influence the pace of their work (20%) or choose the task they do next (16%). They are equally as likely to not have any influence on how to do the task (13%).

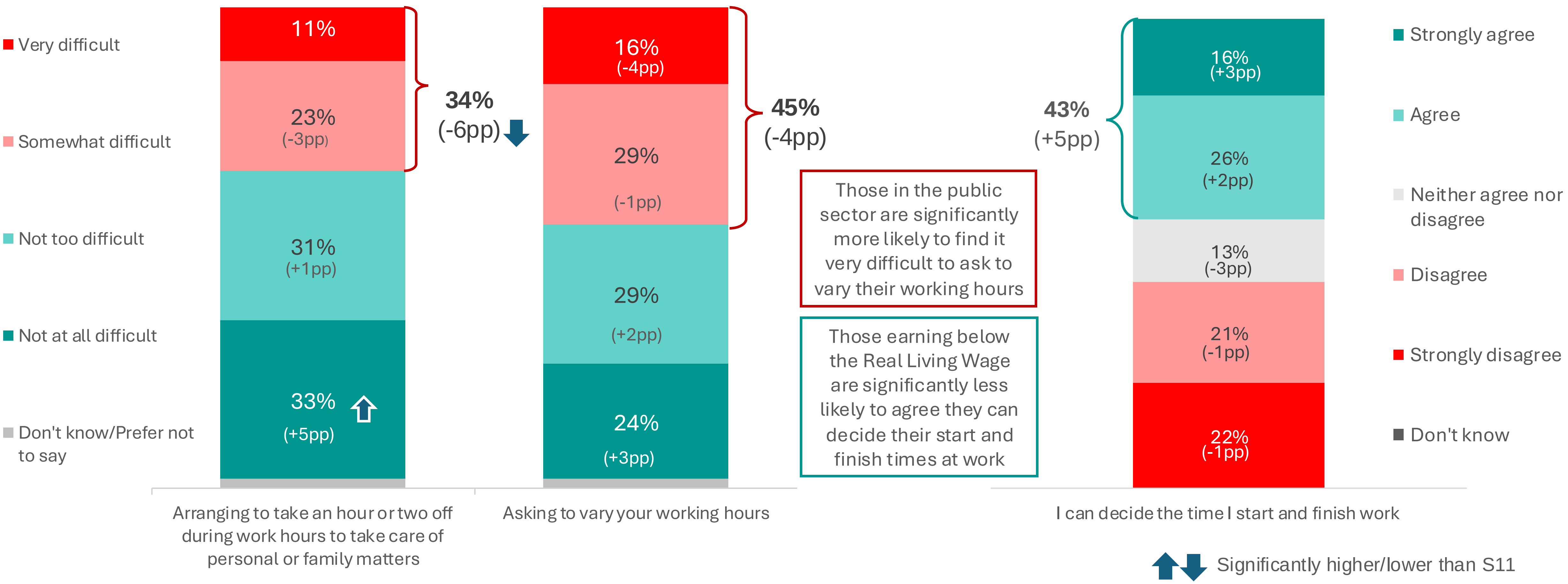


GW1. How much influence do you personally have on…?
Base: S15, 878 (All online respondents who are working)

However, despite this, flexibility has improved somewhat since February. Respondents were significantly less likely to say they find it difficult to arrange to take an hour or two off during work hours (34% cf. 40%). A slightly higher proportion (45%) find it difficult to vary working hours. Similar figures (43%) are able to decide the time they start and finish work

Flexible aspects of working

Figures in brackets show change since Feb '24 (S11)



GW3. How difficult would you say the following aspects of work are? Arranging to take an hour or two off during work hours to take care of personal or family matters | Asking to vary your working hours Base: 878 (All online respondents who are working). GW8. How much do you agree or disagree with the following statements? Base: 878 (Rapid response panel respondents who are working)

Those reporting difficulty with job flexibility at a significantly higher rate include people in racially minoritised groups and those with long term health conditions

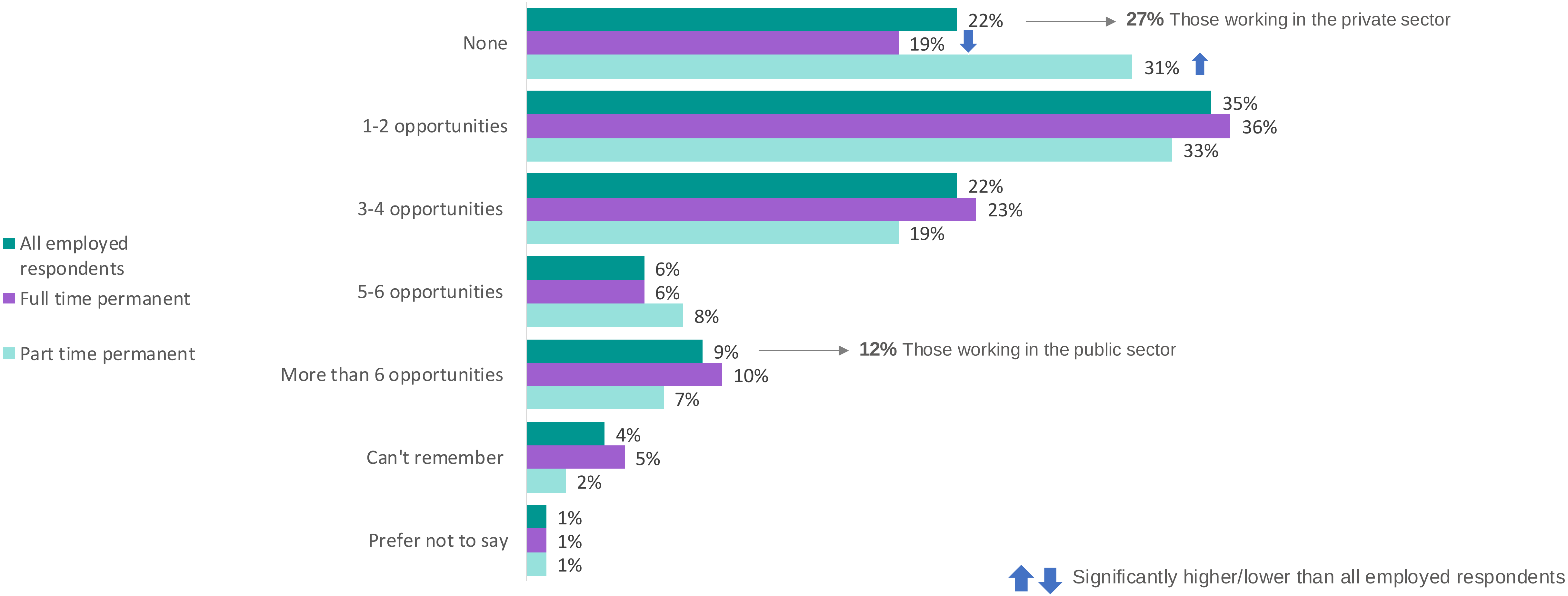
% who are significantly more likely to find it difficult to take an hour or two off during work hours compared to the merged S8-15 GM average (38%):	% who are significantly more likely to find it difficult to ask to vary their working hours compared to the merged S8-15 GM average (48%):
Demographics: • Those who are Black or Black British (54%) • Those who are Muslim (47%) • Those who identify as trans (60%) • Those who have a disability (47%) • Those who have a long term health condition (45%), specifically those whose condition impacts their ability to do things by a lot (56%) • Those who are currently carers (46%) **Individual or family circumstance:** • Those likely to lose their job in the next 12 months (59%) • Those with low levels of life satisfaction (55%) • Those who do not feel their life is worthwhile (50%) • Those finding it difficult to afford their rent (48%) or mortgage (48%) • Those with high levels of anxiety (47%) • Those employed in the public sector (43%) • Those unable to save any money in the next 12 months (45%) • Those who have had to borrow more money or use more credit in the last month (46%) • Those who are finding it difficult to afford their energy costs (45%) • Those whose cost of living has increased in the last month (41%)	**Demographics:** • Those with a long-term health condition lasting longer than 12 months (53%) • Those aged 25-44 (52%) • Those who are Black or Black British (61%) **Individual or family circumstance:** • Those with low levels of happiness (63%) • Those likely to lose their job in the next 12 months (65%) • Those with low levels of life satisfaction (64%) • Those who do not feel that their life is worthwhile (60%) • Those unable to save any money in the next 12 months (55%) • Those with a household income of £15,600 - £36,400 (54%) • Those employed in the public sector (51%) • Those with high levels of anxiety (55%) • Those who have had to borrow more money or use more credit in the last month (55%) • Those with children (50%) • Those whose cost of living has increased in the last month (50%)

Subgroup analysis uses merged data from S8, 11, 15

GW3. How difficult would you say the following aspects of work are? Arranging to take an hour or two off during work hours to take care of personal or family matters | Asking to vary your working hours. Base: 2185, S5, 704, S8, 807, S11, 674 (All online respondents who are working)

In terms of development and training opportunities, a fifth (22%) say they have not had any opportunities made available to them. A third (35%) say they have had at least 1-2 opportunities over the last year – consistent among full or part time employees

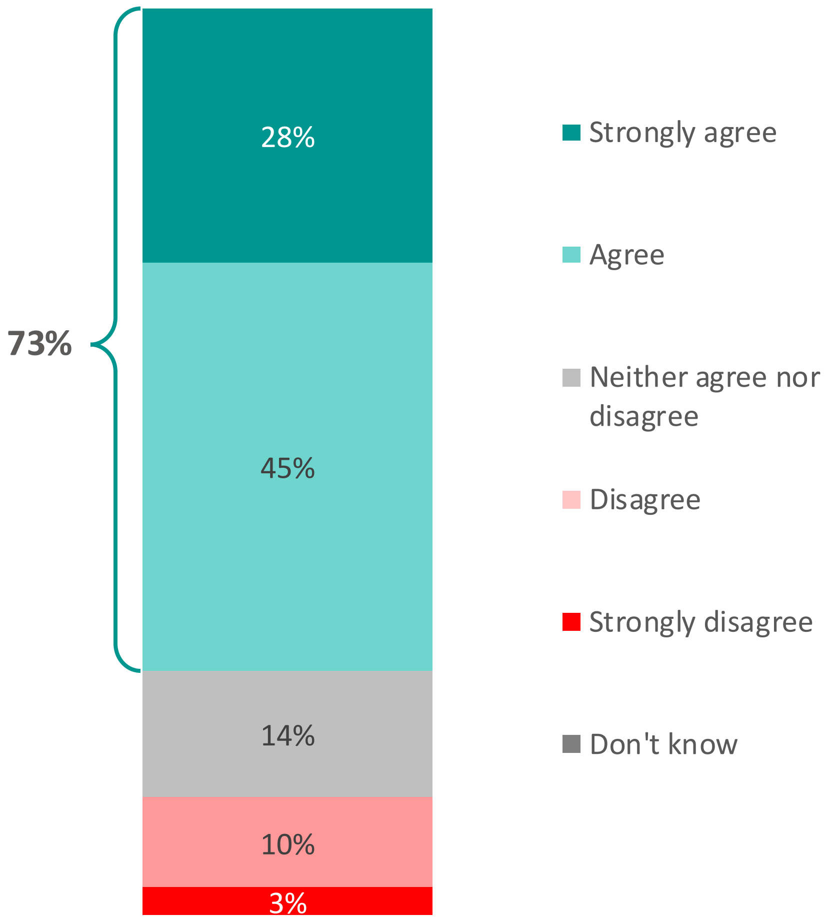
How many professional development or training opportunities have been available to you in the past 12 months?



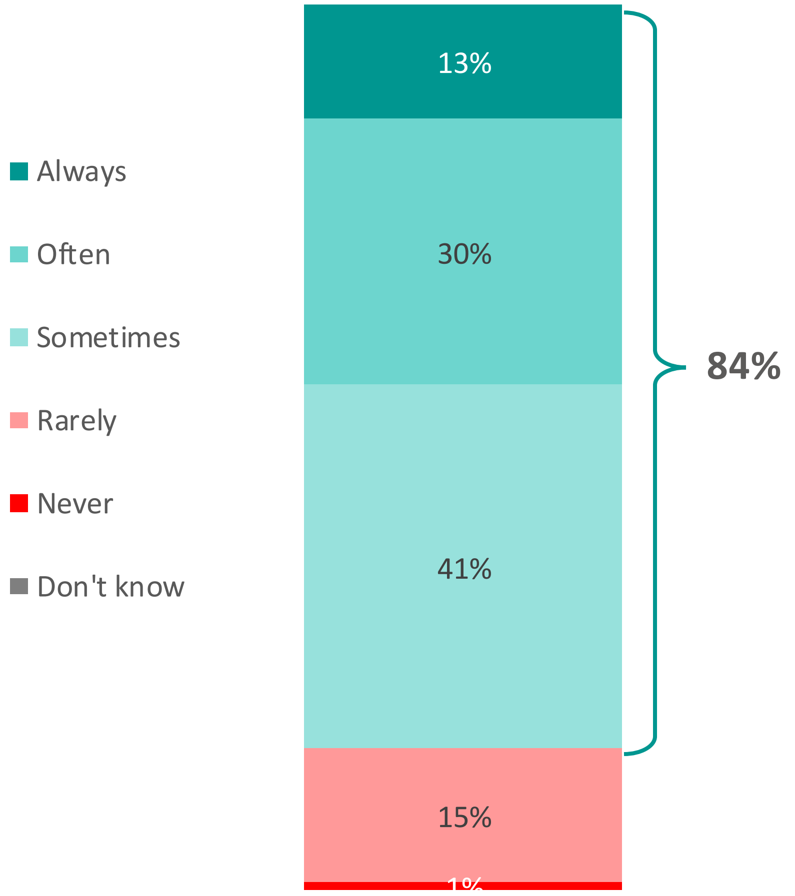
GW2_7.How many professional development or training opportunities have been available to you in the past 12 months? Base: All online respondents who are employed (751) All in full time permanent employment (549), All in part time permanent employment (166)

73% agree that their job makes good use of their skills and abilities while 84% say they are required to learn new things for their job at least sometimes

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

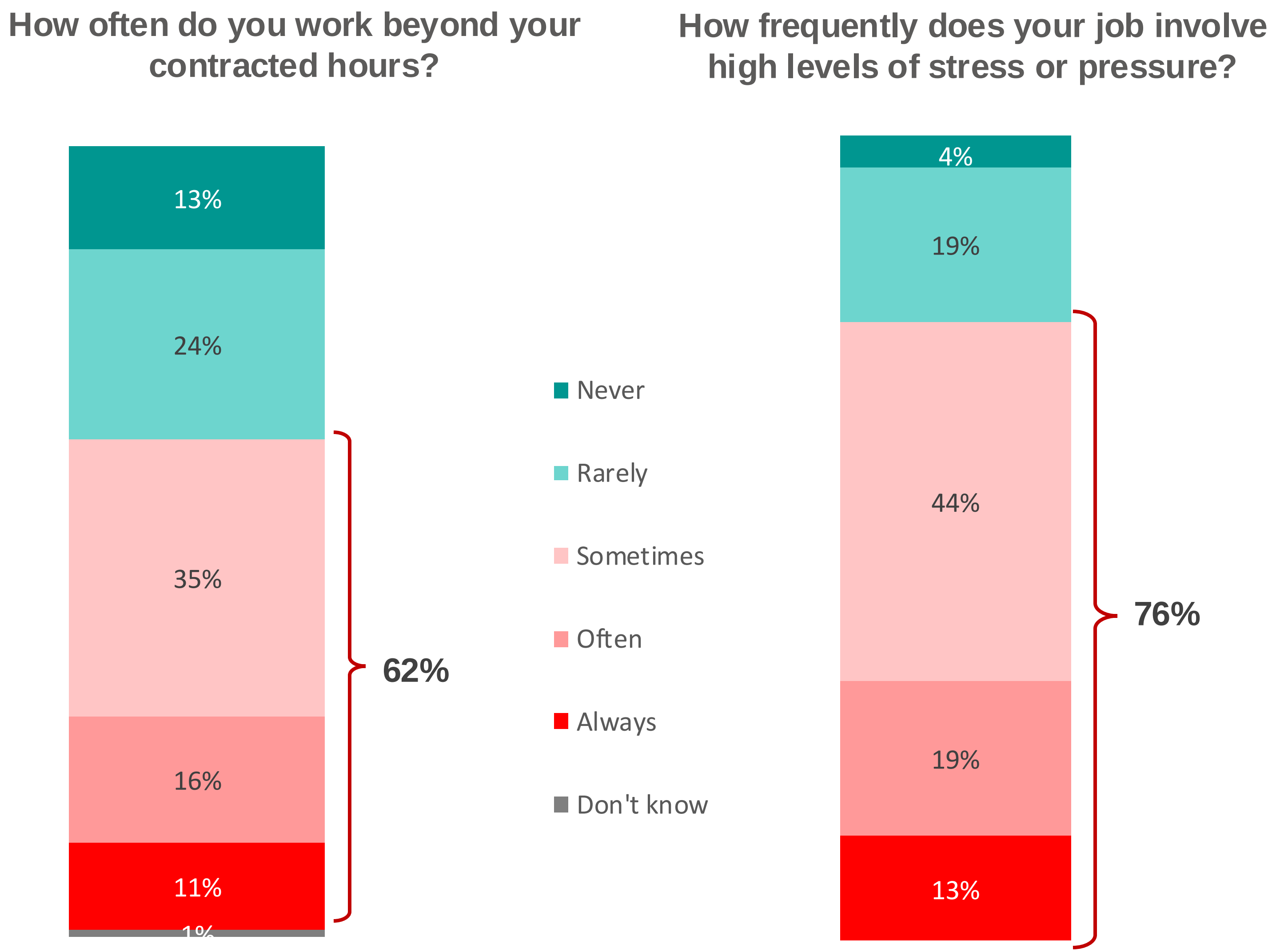


How often does your job require you to learn new things?



GW2_3. How frequently does your job involve high levels of stress of pressure? Base: Those who are employed (751). GW2_5. How often do you work beyond your contracted hours? Base: All online respondents who work (684)

Over three fifths (62%) say that their job sees them work beyond their contracted hours at least sometimes. Three quarters (76%) say that their job involves high levels of stress or pressure at least sometimes. There is no significant difference in either metric when considering public / private / VCFSE employment



Respondents most likely to at least sometimes work beyond their contracted hours compared to 62% of the GM average:

- Those who have volunteered in the last 12 months (67%)
- Those who have children in education (67%)
- Those who are dissatisfied with their pay (69%)
- Those who feel they are at risk of unemployment (71%)
- Those who have a full-time paid job (65%)

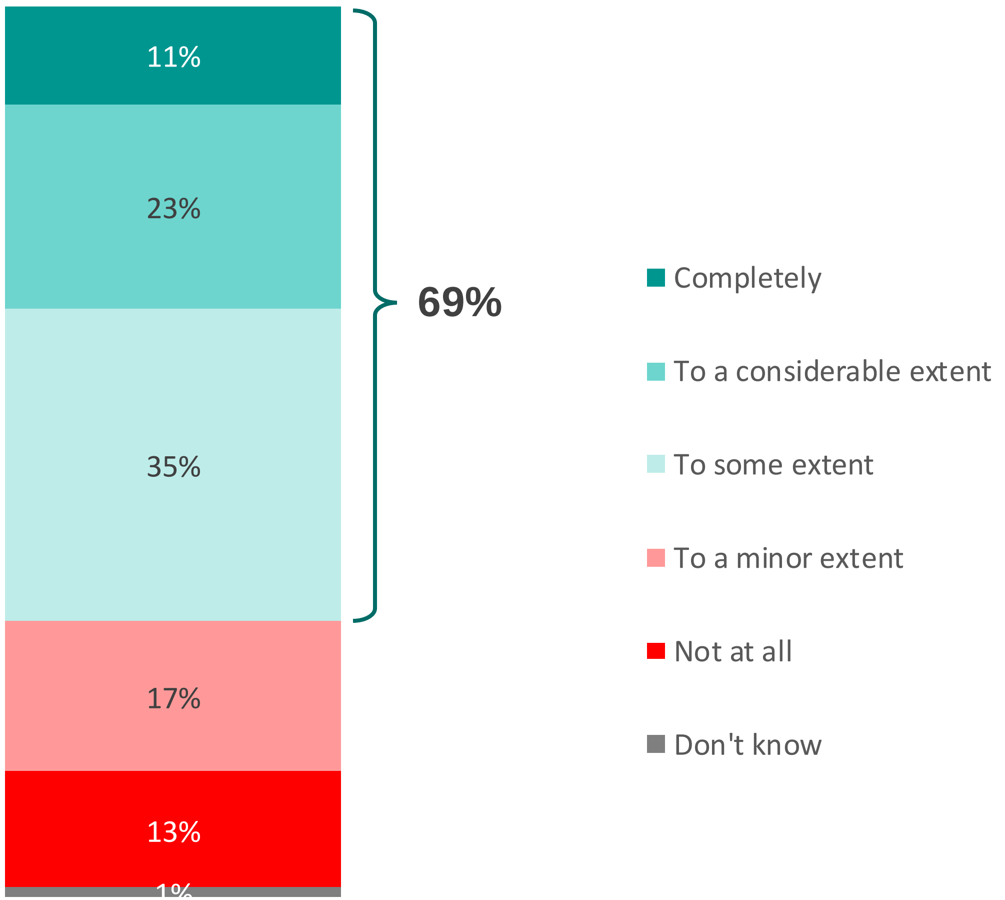
Respondents most likely to have a job that frequently involves high levels of stress or pressure at least sometimes, compared to 76% of the GM average:

- Those who have a full-time paid job (78%)
- Those who have a household income of £36,400 to £51,999 (84%)
- Those with high levels of anxiety (82%)
- Those who feel that the things they do in their life is worthwhile (79%)
- Those who disagree that they can look after their own health (89%)

GW2_3. How frequently does your job involve high levels of stress of pressure? Base: Those who are employed (751). GW2_5. How often do you work beyond your contracted hours? Base: All online respondents who work (684)

7 in 10 (69%) say that their **pay fairly reflects their work** at least to some extent. 13% say this is not the case at all

To what extent do you believe that your pay fairly reflects the work that you do?



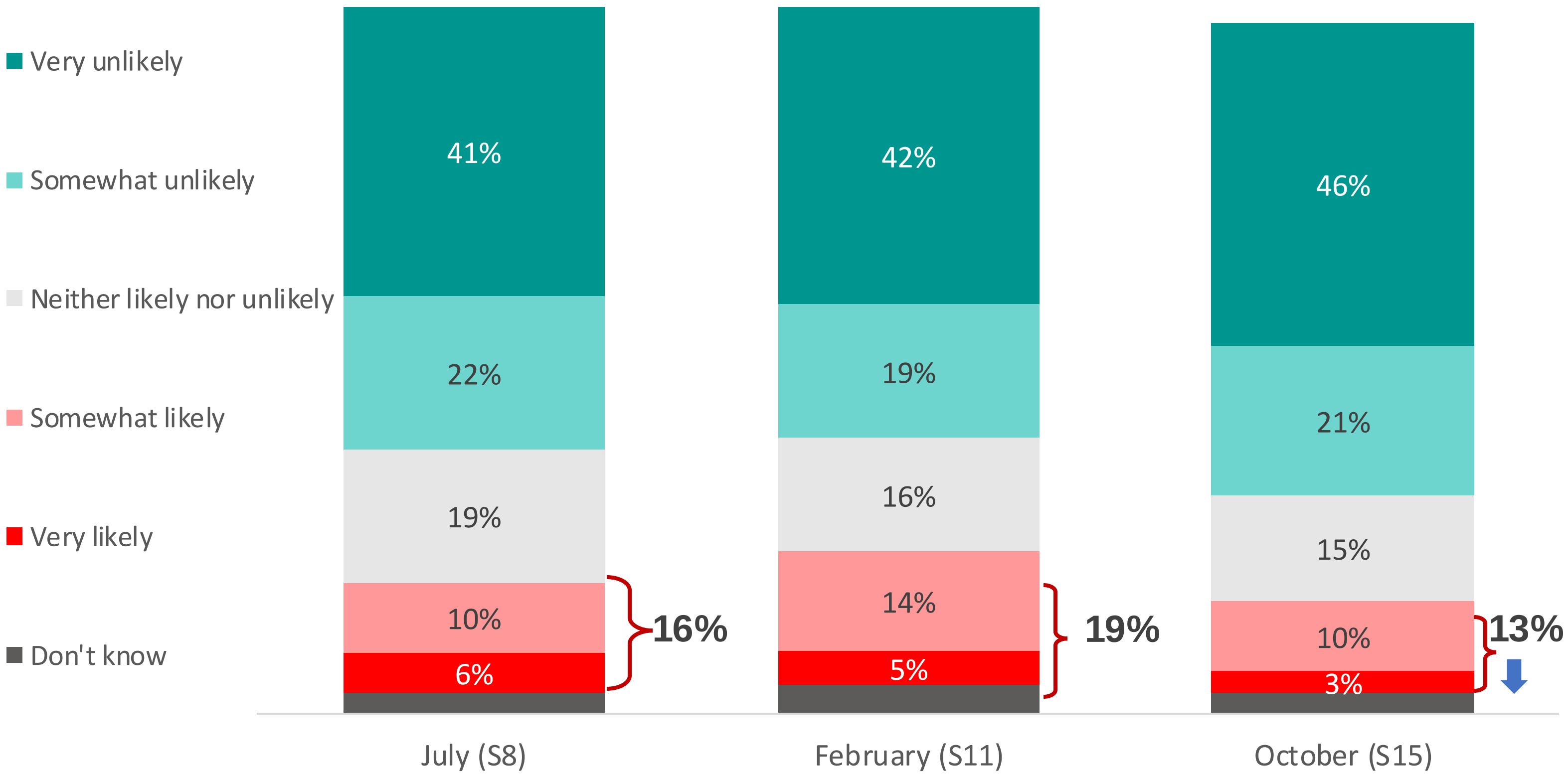
Respondents on higher wages are significantly more satisfied that their pay fairly reflects their work to at least some extent.

More meaningful subgroup analysis will be revisited when this question has been asked again and there is a higher sample size to analyse.

GW2_6. To what extent do you believe that your pay fairly reflects the work that you do?
Base: Those who are employed (751)

13% of respondents think that they are likely to lose their job in the next 12 months, which is a significant decrease since February. This is higher amongst those experiencing some aspect of financial difficulties, those with caring responsibilities and disabled respondents

How likely do you think you are to lose your job and become unemployed in the next 12 months?



Respondents likely to lose their job in the next 12 months in comparison to the S8-15 GM average (15%):

Demographics:

- Those aged 16-24 years old (31%)
- Those from Minority Ethnic Groups (23%)
- Those with a disability (31%)
- Those with current caring responsibilities (20%)

Individual and/or family circumstance:

- Those who do not feel that their life is worthwhile (25%)
- Those with high levels of anxiety (24%)
- Those with low levels of happiness (23%)
- Those with low levels of life satisfaction (23%)
- Those who have children under 5 years old (22%)
- Those who have had to borrow more money or use more credit in the past month (21%)
- Those who experience difficulties in affording energy costs (17%)

⬆ ⬇ Significantly higher/lower than S8

GW6ai. How likely do you think you are to lose your job and become unemployed in the next twelve months?
Base: S15, 839 (All employed respondents who are in a paid job (not self-employed))

Your Local Area

Your local area – context

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

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 13, 14 and 15.

Benchmarks, where included, reflect most recent published national data from the DCMS' Community Life Survey (covering October 2023 - December 2023)*. The DCMS survey is conducted through self-completion, either online or on a paper questionnaire. This is comparable with the Residents' Survey, which (in the main) follows a self-conducted online method. Updated benchmarks will be available for the next reporting period for Survey 16.

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

Your local area – key findings (1 of 2)

OVERALL SATISFACTION WITH LOCAL AREA

- Overall satisfaction with respondents' local areas as a place to live has remained stable throughout the summer months into Autumn (73%), meaning satisfaction continues to be in line with the England benchmark of 74%
- 78% of respondents would recommend their local area as a place to live. This has remained in line with July 2024 and August 2024 (78% and 79% respectively)

SATISFACTION WITH LOCAL SERVICES AND AMENITIES

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

- Around 2 in 3 respondents have historically been satisfied with the availability of public transport in their area. Satisfaction is then highest for bus services, with less than half of respondents satisfied with train services and trams typically
    - Whilst this data has not moved significantly since the last survey, when compared with results from a year ago, a positive trend can be detected. Satisfaction with the availability of public transport has increased from 63% in September 2023 to 66% in November 2024. Bus services have also increased in satisfaction from 54% then to 61%. Train services has also seen an increase, from 42% to 45%. Only the Metrolink has decreased in satisfaction, from 47% to 42%.
- Satisfaction remains at just under half of respondents with the conditions of the roads in their area throughout the surveys. Satisfaction is around a third for cycle lanes and conditions of paved areas
- 3 in 4 continue to be satisfied with the parks and other green spaces in their local area, 2 in 3 are satisfied with their local services and amenities and over half are satisfied with their nearest town centre. Satisfaction also remains stable for maintenance of their local area (62% cf. 59% in August)
- However, while overall satisfaction remains similar in terms of taking part in cultural events and activities (at around 3 in 5 historically) the latest survey shows a significant fall in respondents who 'definitely agree' (12% cf. 16% in August) translating into a significant rise in those who tend to 'agree' (46% cf. 42% in August)

In terms of local governance and the running of the local area – a similar stability can be demonstrated:

- 9 in 10 (92%) agree that the 10 councils in Greater Manchester should work together for issues that affect everyone (cf. 91% in August)
- A similar figure (88%) agree that it's important that services in their area are developed and influenced by people who live and work there. This is stable with August (86%) however, the small minority of respondents who definitely disagree has significantly risen (4% cf. 2%)
- Slightly over three quarters (78%) agree that they want to have a say in what happens in their local area (cf. 77% in August)

Your local area – key findings (2 of 2)

NEIGHBOURHOOD AND COMMUNITY

- There have been no recent significant changes around satisfaction with community cohesion – with 77% agreeing that their local area is a place where people from different backgrounds get on well together (cf. 76% in August). 72% express agreement that their local area is a place where people look out for each other (cf. 71% in August) and 69% agreeing that they are proud of their local area (was 68% in August)
- Just over 4 in 5 agree that if they needed help, there are people who would be there for them (81%, was 82% in August), and a similar proportion (77%) agree that if they wanted company or to socialise there are people they can call on (was 79%)
  - Whilst overall agreement has remained stable, levels of respondents who 'definitely agree' on both statements have fallen significantly
- There have been no significant changes in feelings of loneliness, 9% of GM respondents reported feeling lonely often or always, slightly higher than the 7% of respondents across GB in June.
  - 3 in 10 (31%) GM respondents reported feeling lonely at least some of the time, compared to 27% of GB adults (resulting in a wider 'gap' between GM and GB results than has been reported previously)

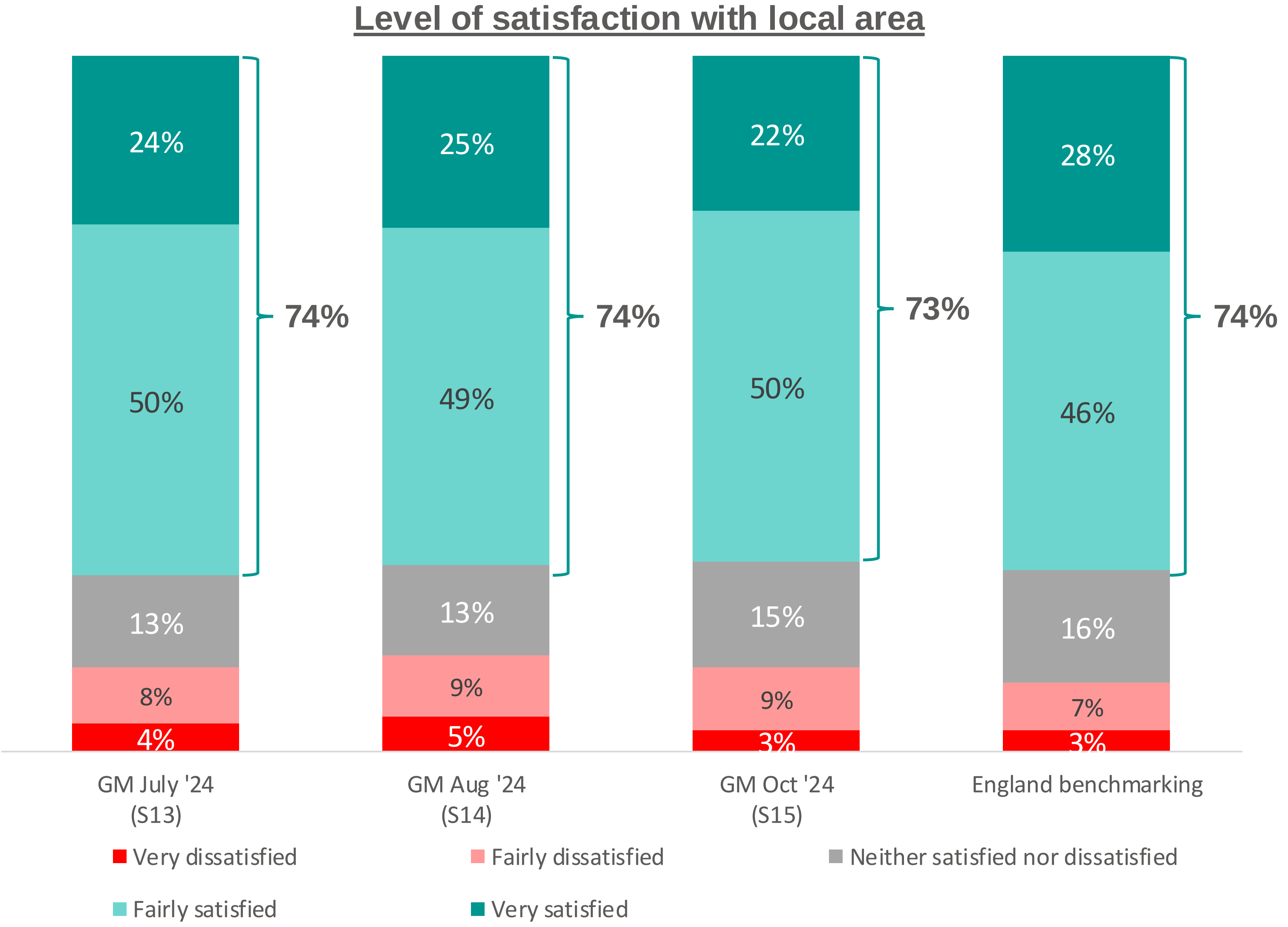
INVOLVEMENT IN GROUPS, CLUBS OR ORGANISATIONS

- Over half (54%) of respondents reported having been involved in a group, club, or organisation in the last 12 months, which is in line with August. This continues to be slightly lower than the England benchmark of 56%
- The most popular type of group, club or organisation to have been involved in is sport / exercise (which includes taking part, coaching, or going to watch), with 24% having been involved in this in some way, followed by hobbies (15%) and religion (15%). Excluding sport, just under half (48%) are involved in any type of group, club or organisation

VOLUNTEERING

- A third (32%) of respondents continue to have volunteered in the last year
  - Certain ethnic groups are more likely to volunteer, as are those who have previously had caring responsibilities, those with a learning disability and high earners
  - Conversely, those who are digitally excluded and older respondents are less likely to volunteer

Satisfaction with their local area as a place to live remains at 3 in 4 (73%) respondents and has remained broadly stable since March 2023. This also remains equal to figures representing England



% with 'low' satisfaction of local area compared to Surveys 13-15 GM average (13%)*

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

Demographics:

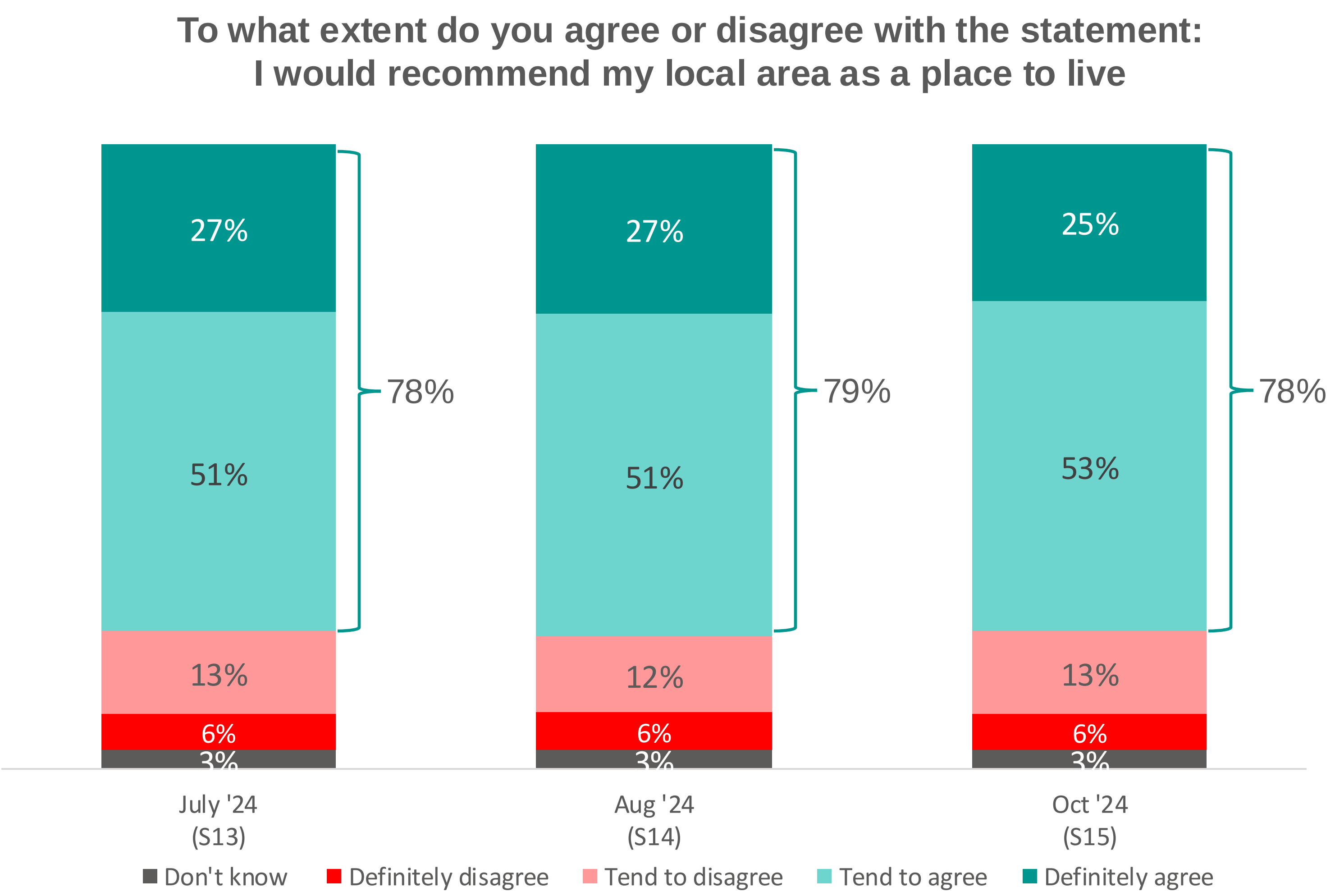
- Those with a disability (21%) including those with mental ill health (23%), a sensory disability (28%), or mobility disability (22%)

Individual and/or family circumstance:

- Those who would not recommend their local area as a place to live (56%)
- Those who disagree that people from different backgrounds get on well together (35%)
- Those not in work due to ill health or disability (29%), or have been out of work for more than 6 months (27%)
- Those with low levels of life satisfaction (33%)
- Those who disagree they have the ability to look after their own health (30%)
- Those with very low levels of hopefulness (33%); and feel they are not treated fairly by society (29%)
- *Those with current caring responsibilities (17%)*
- Those renting their home (16%) specifically those renting from Local Authority / Council (19%) or a Housing Association / Trust (24%)
- Those aged 65+ and who are deprived (18%)

LA2. Overall, how satisfied or dissatisfied are you with your local area as a place to live? *Relates to respondents who are fairly dissatisfied and very dissatisfied.
Unweighted base: Greater Manchester Residents S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1506

Recommendation of their local area as a place to live remains at 4 in 5 (78%) respondents. Those more likely to be dissatisfied include respondents with a disability, renters and young females



% who would not recommend their area as a place to live compared to S13-15 GM average (19%)*

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

Demographics:

- Those with a disability (28%), including those with mental ill health (34%), a sensory disability (33%) or mobility disability (28%)
- *Those aged 65 and over in highly deprived areas (27%)*
- *16-24-year-old females (27%)*

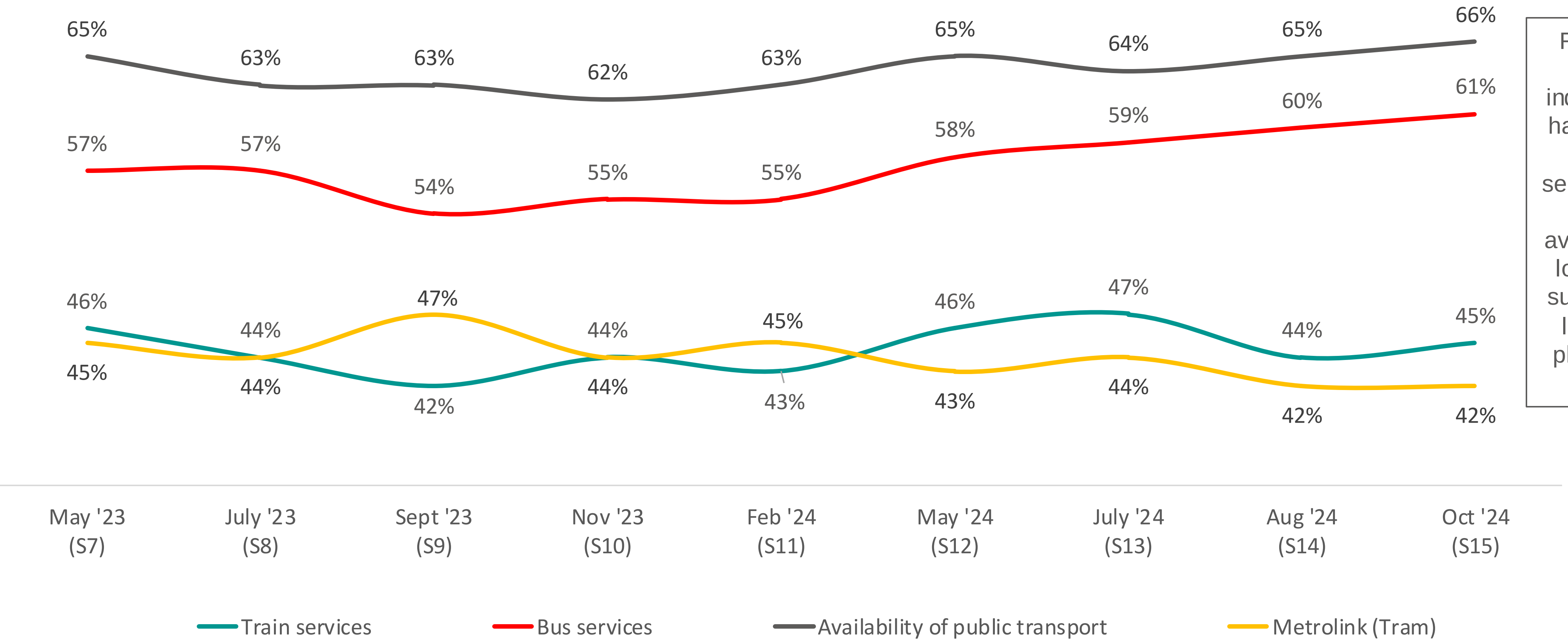
Individual and/or family circumstance:

- Those dissatisfied with their local area (84%)
- Those who do not agree that people from different backgrounds get on well together (50%)
- Those with very low levels of hopefulness (43%)
- Those who have been out of work for 6 months or less (41%), or not in work due to ill health or disability (31%)
- Those who disagree there are cultural opportunities in their local area (38%)
- Those who do not agree that they are able to look after their own health (35%)
- Those renting their home (25%) specifically those renting from a Local Authority / Council (30%), or a Housing Association / Trust (33%), or living with a friend or family (31%)

LA3. To what extent do you agree or disagree with the statement: I would recommend my local area as a good place to live Unweighted base: Greater Manchester Residents Survey, S13, 1540; S14, 1482; S15, 1517

Satisfaction with transport and travel facilities remains stable, however, comparing the latest set of results with those from a year ago shows a positive increase in satisfaction with the availability of public transport (66% cf. 63% in Sept 23), bus services (61% cf. 54%) and train services (45% cf. 42%)

Level of satisfaction with transport and travel facilities

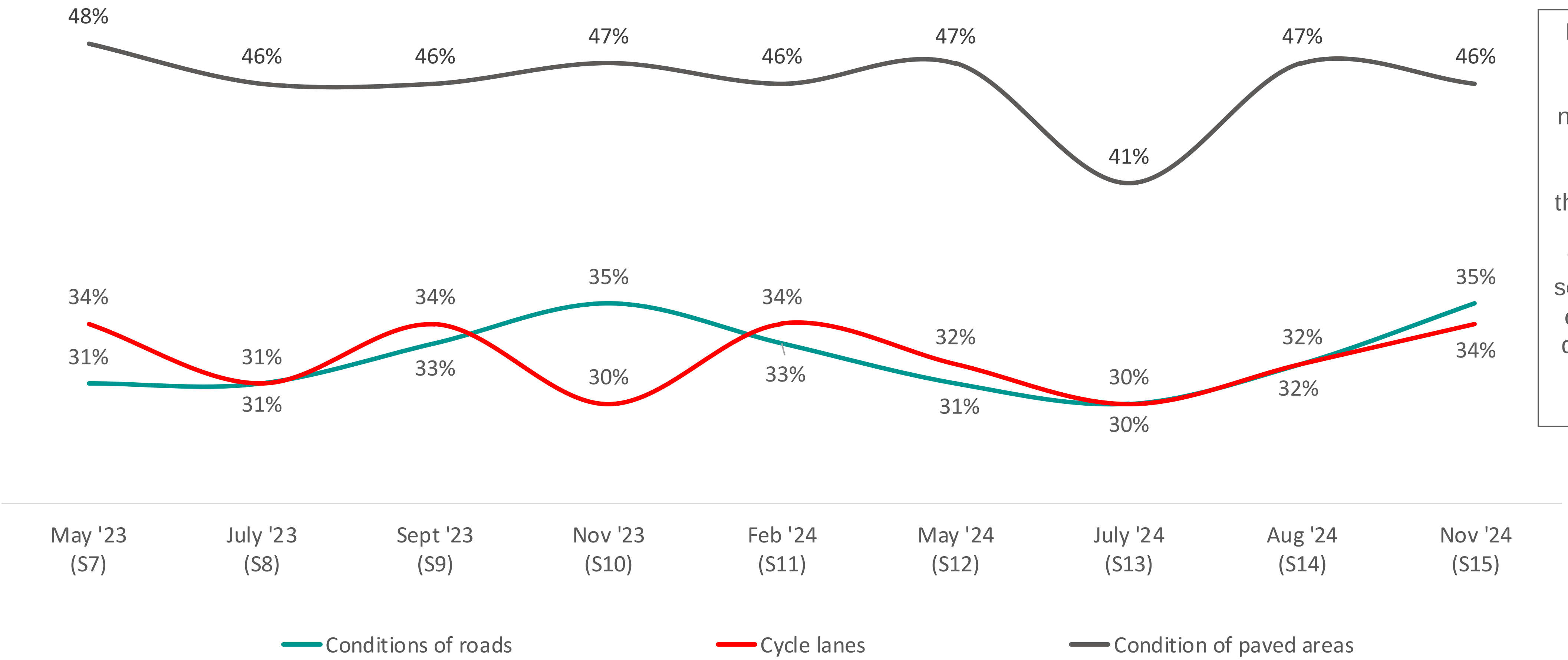


Respondents have the option of indicating they do not have experience of a particular service/aspect, or that something is not available at all in their local area. To see a summary table of the latest survey data, please see charts in the Appendix

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

Just under half of respondents continue to be satisfied with the conditions of the paved areas in their area. Satisfaction also continues to remain at around a third for cycle lanes and conditions of roads

Level of satisfaction with transport and travel facilities

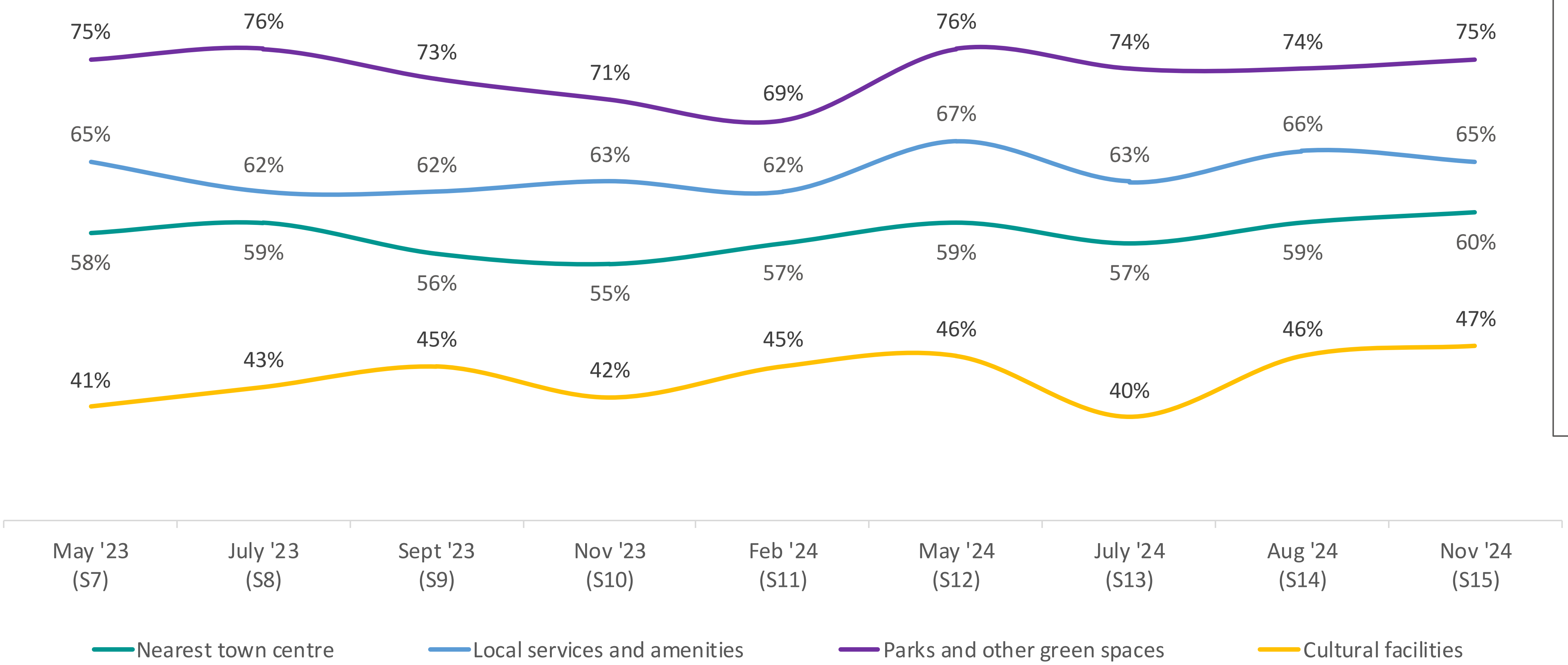


Respondents have the option of indicating they do not have experience of a particular service/aspect, or that something is not available at all in their local area. To see a summary table of the latest survey data, please look at slide 95 in the Appendix

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

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

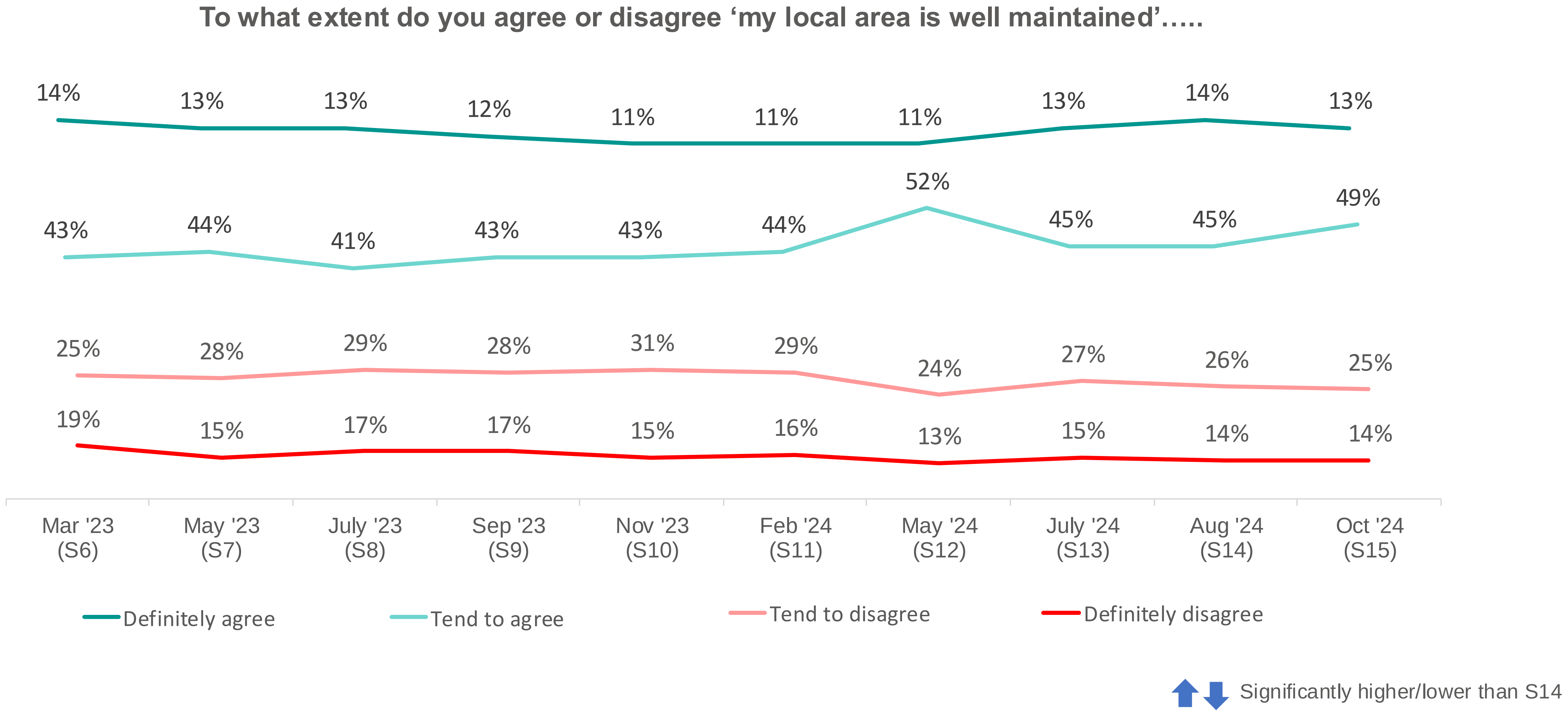
Level of satisfaction with facilities in the local area



Respondents have the option of indicating they do not have experience of a particular service/aspect, or that something is not available at all in their local area. To see a summary table of the latest survey data, please look at slide 96 and 97 in the Appendix

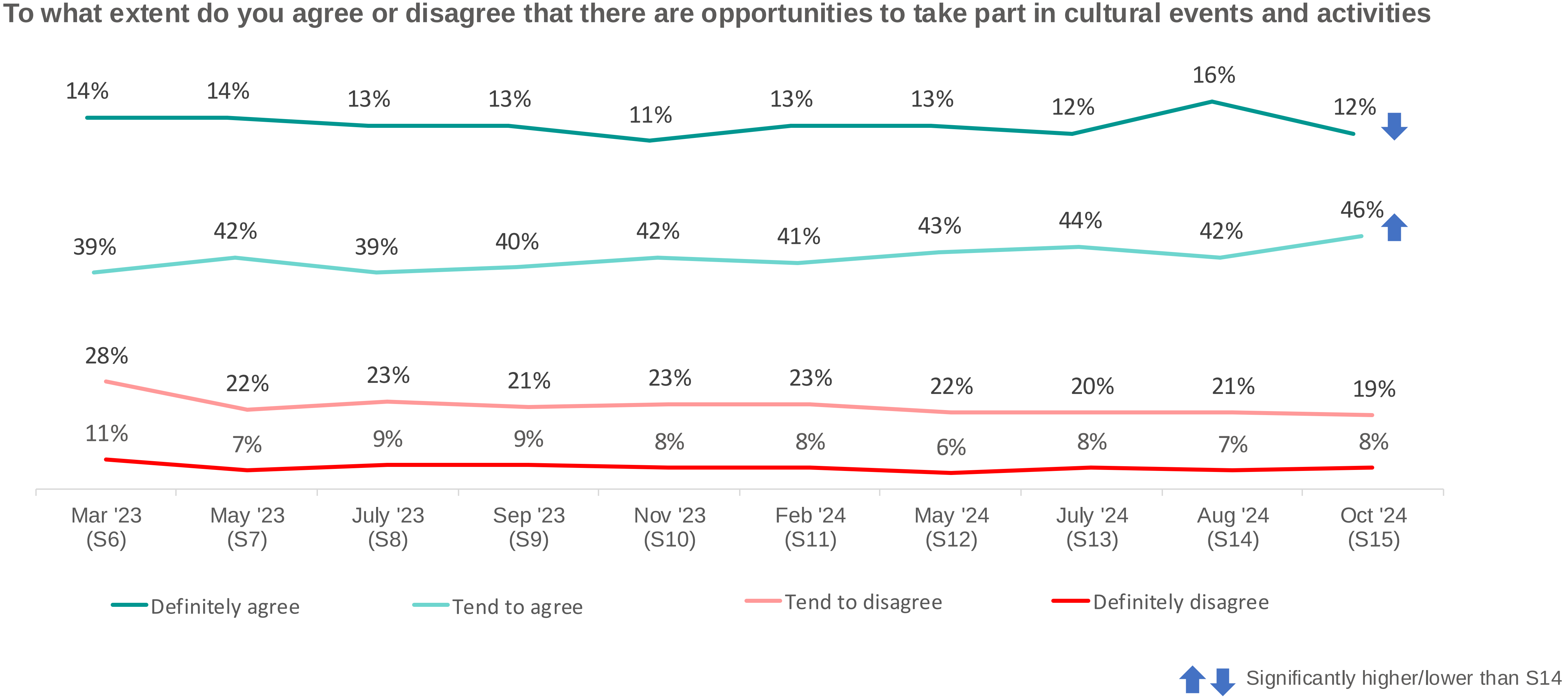
LA4. Generally, how satisfied or dissatisfied are you with…?
Unweighted base: S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517 (All respondents).

3 in 5 (61%) continue to agree that their local area is well maintained has remained stable with August, with 39% disagreeing



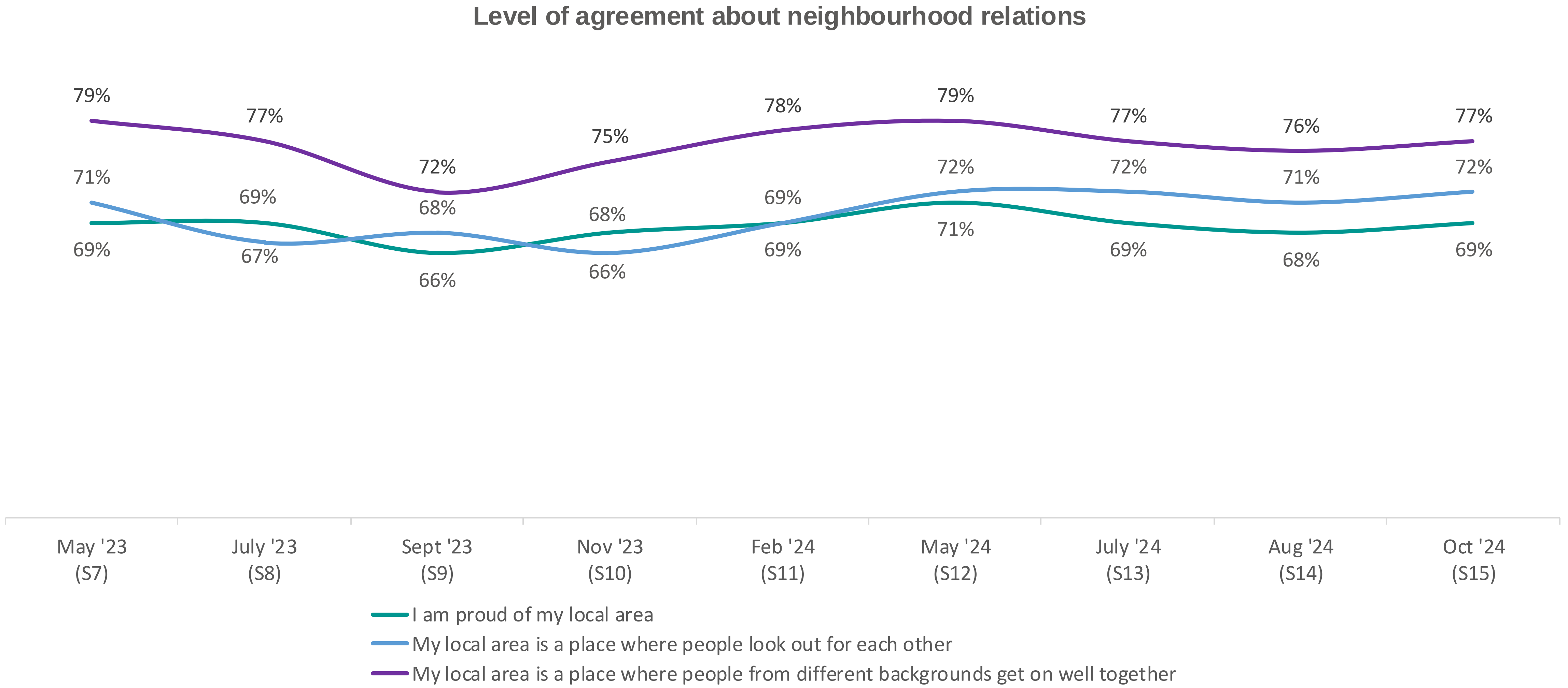
LA6. To what extent do you agree or disagree with the following statements about your local area?
Unweighted base: S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517 (All respondents).

Whilst the proportion who agree that there are opportunities to take part in cultural events and activities has remained at around 3 in 5 historically – those who ‘definitely agree’ have fallen significantly in October (with those only ‘tending to agree’ having risen)



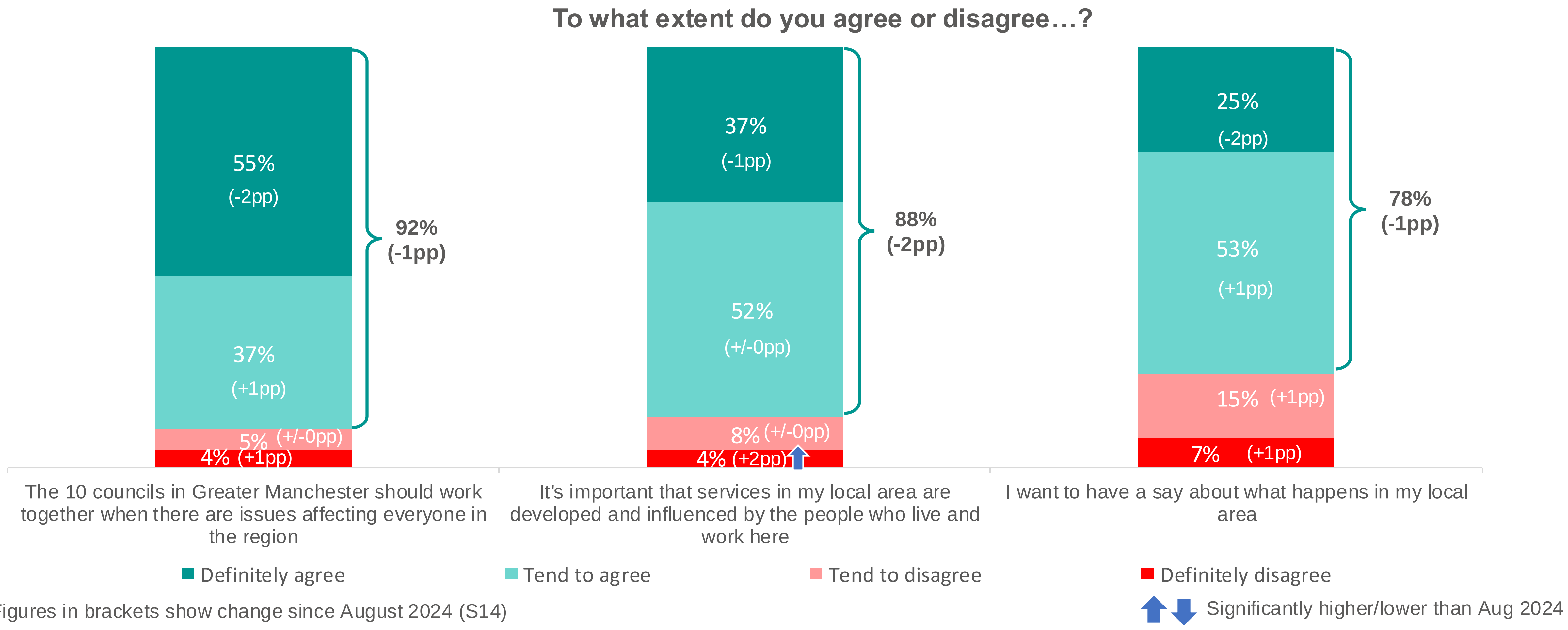
LA5. To what extent do you agree or disagree that there are opportunities to take part in cultural events and activitiess in your local area?
Unweighted base: S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517 (All respondents).

With regards to community cohesion, stability prevails, with belief in your local area being a place where people from different backgrounds get on well together sitting at around 3 in 4 respondents. On accompanying measures of social capital, around 2 in 3 respondents agree people look out for each other in their local area and that they are proud of it



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

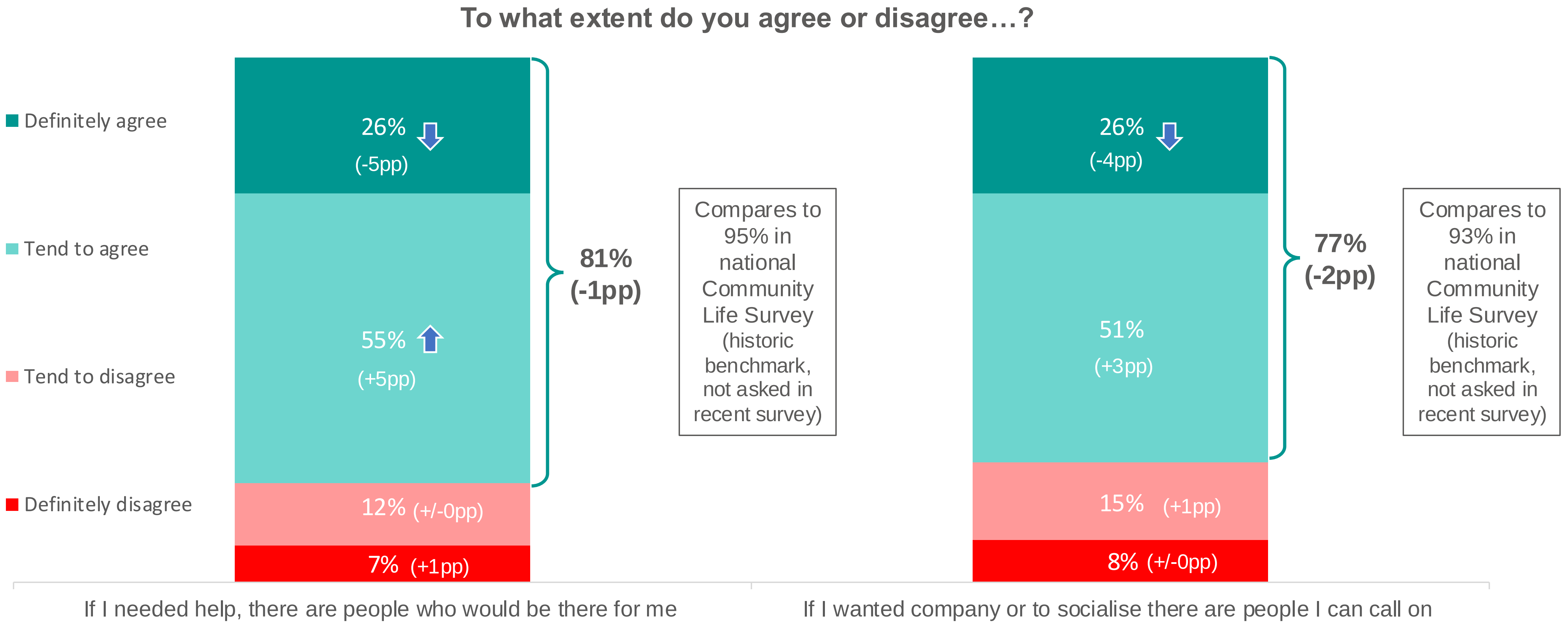
In terms of the running of their local area, there is continued widespread agreement from respondents that the **10 councils in GM should work together** (92%) on widespread issues and that **services are developed and influenced by people who live and work there** (88%). Almost 4 in 5 agree they **want to have a say about what happens in their local area** (78%)



Figures in brackets show change since August 2024 (S14)

LA6. To what extent do you agree or disagree with the following statements about your local area?
Unweighted base: Survey 14, 1482; Survey 15, 1517 (All responses) Only valid responses shown

Again, while the overall levels of agreement from respondents that others would be there for them if they needed help or that if they wanted company or to socialise there are people they can call on have remained stable, proportions of those who definitely agree have fallen significantly since August

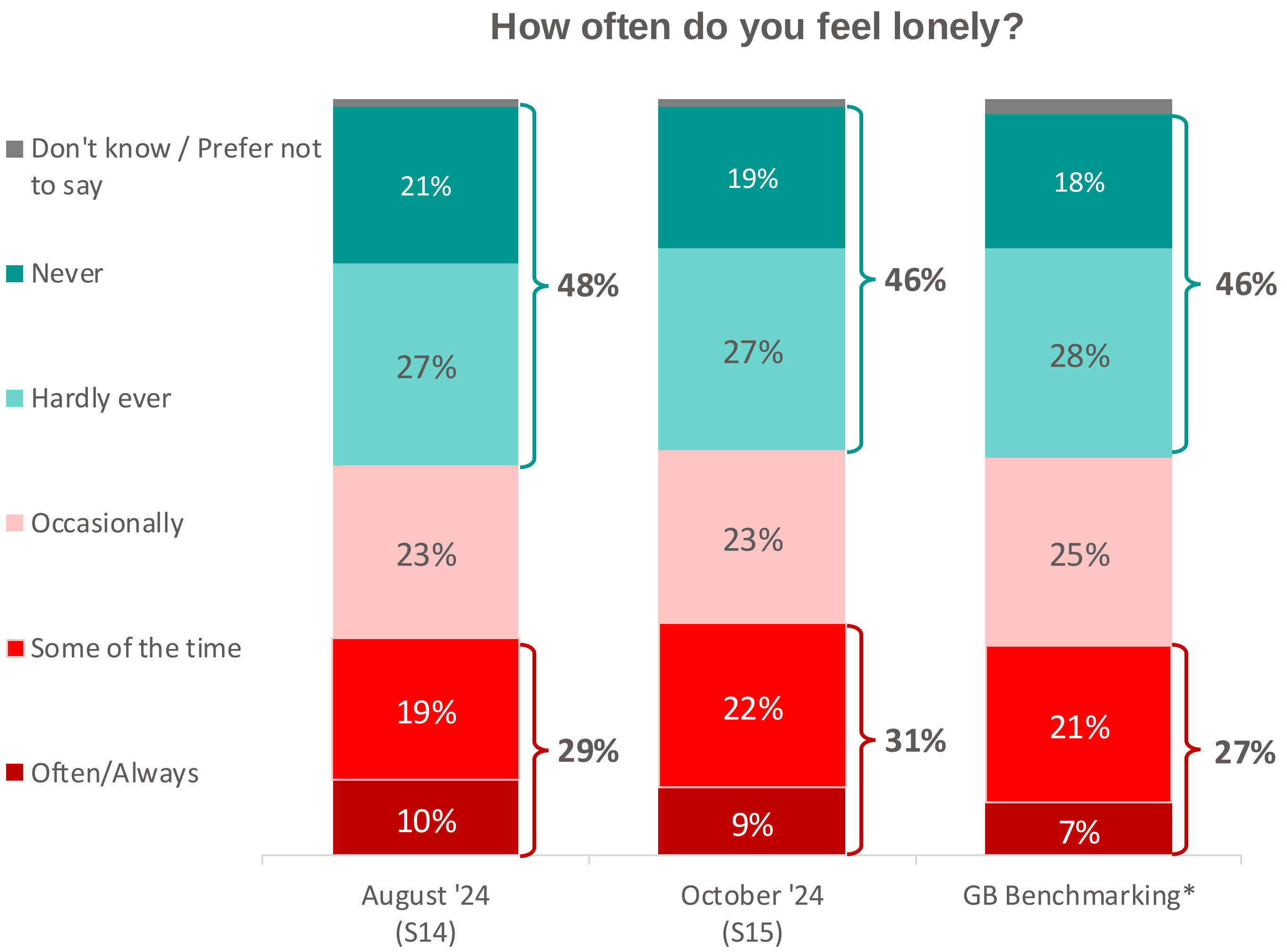


Figures in brackets show change since August 2024 (S14)

Significantly higher/lower than Aug 2024

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

There have been no significant changes in feelings of loneliness, 9% of GM respondents reported feeling lonely often or always, slightly higher than the 7% of respondents across GB in June. 3 in 10 (31%) GM respondents reported feeling lonely at least some of the time, compared to 27% of GB adults (resulting in a wider 'gap' between GM and GB results than has been reported previously)



% who feel lonely at least some of the time compared to surveys 14-15 GM average (30%)*:

Demographics:

- Those with a disability (44%), including those with mental ill health (57%), a learning disability (54%), a sensory disability (47%)
- Those aged 16-24 (45%)
- Gay men (44%)

Individual and/or family circumstance:

- Those with the ability to look after their own health (64%), or disagree they know enough about their health (58%)
- Those likely to lose their job over the next 6 months (54%)
- Those not in work due to ill health or disability (52%), or those studying at university (44%)
- Those who are dissatisfied with their local area (45%)
- Those who are living with a friend or family (44%)
- Those who have claimed financial support (44%)

A5. How often do you feel lonely?
Base: Survey 14, 1482; Survey 15, 1517. GB benchmarking taken from UK measures of wellbeing (fieldwork period 2 to 27 October 2024)

Around half (54%) of respondents have been involved in a type of group, club or organisation in the past 12 months, in line with August, and slightly lower than the England average (56%). Just under half, 48%, are involved in a club or organisation not related to sport

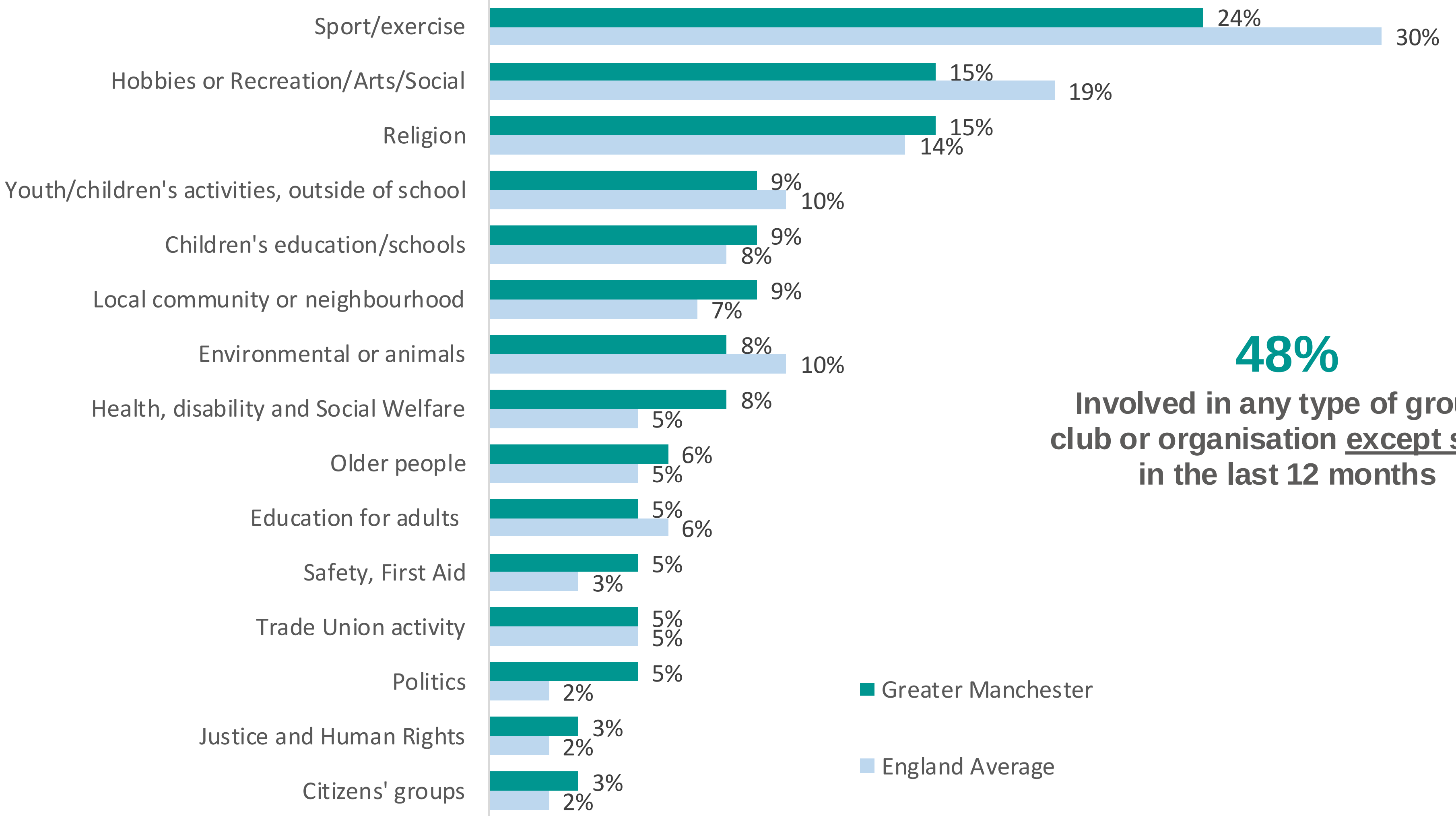
54%

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

56%

in **England**

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



48%

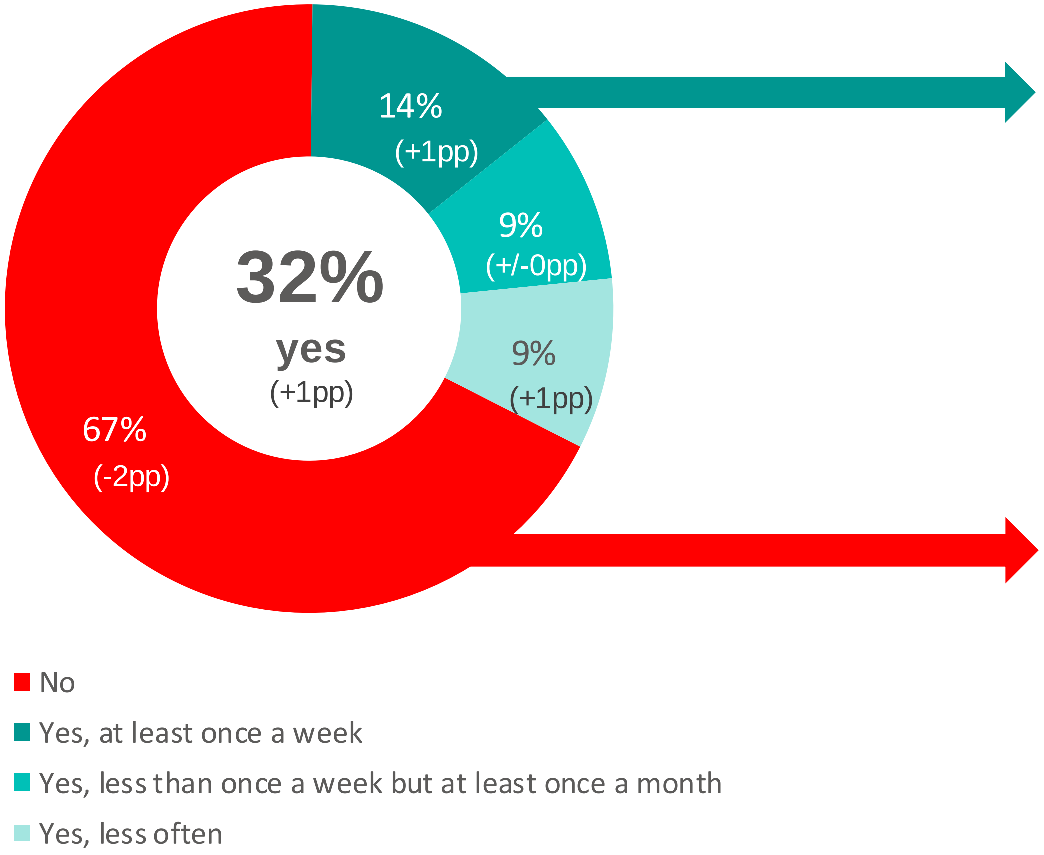
Involved in any type of group, club or organisation except sport in the last 12 months

LW1. Have you been involved with any of the following types of groups, clubs or organisations during the last 12 months? Unweighted base: 4539 (All respondents, S13-15)

Just under a third (32%) respondents have volunteered in the past year. High earners, African respondents and those who have previously cared for someone are more likely to have volunteered, while those with no internet access and low confidence online are most likely to not volunteer

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

Survey 14 (Aug) only



S13-15 combined: The following groups are more likely to volunteer, compared to the Greater Manchester average (31%)*

62% African respondents
65% Those in the voluntary or community sector
59% Those who previously had caring responsibilities
***59%** Those likely to lose their job over the next 6 months*
***54%** Those with a learning disability*
50% Those earning above £78,000
***45%** University students*
***45%** Parents who use funded childcare schemes*

S13-15 combined: The following groups are less likely to volunteer, compared to the Greater Manchester average (where 69% have not volunteered)*:

94% Those with no access to the internet
91% Those not in work due to ill health or disability
91% Those not confident in using digital services
***90%** Homemakers*
***86%** Those out of work for less than 6 months*
82% Those aged between 55-64

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

Significantly higher/lower than S14   Figures in brackets show change since Aug (S14)

S12. Thinking of the last 12 months, have you taken part in any volunteering for any clubs, groups or organisations? Unweighted base: 1517 (All respondents)
*subgroup analysis using data from S13-15

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 thirteen surveys). As questions on cost of living have been asked across multiple surveys, we have tracked data over time. We have also merged data where possible, to create a larger and more robust sample for greater analysis of sub-groups. Many questions within this section use a merged sample from the results from surveys 12,13 and 14.

Data in the cost-of-living section of this report has been compared against the latest survey results from the ONS' Opinions and Lifestyle Survey in Great Britain, where comparable information exists. Fieldwork for this survey in Great Britain is published monthly and so comparisons of the GM survey (fieldwork 14th - 28th October 2024) have been compared to the most closely matched ONS fieldwork period, between 2nd – 27th October 2024. ONS uses a mixed methodology, both online and telephone interviews. Please note that some Greater Manchester questions in this section have had their wording or answer options adjusted to reflect changes to the ONS' Opinions and Lifestyle Survey, and so very long-term comparisons back 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

The latest survey data presents a mixed picture, with some positives evident but a range of challenges, especially when comparing GM results to the available GB benchmarks from the ONS Opinions and Lifestyle Survey. Key headlines are as follows:

- Over half of respondents (57%) say their **cost of living has increased in the last month**, remaining significantly higher than the GB average (53%)
- Around one in three respondents (29%) say that they have had to **borrow more money or use more credit in the last month, compared to a year ago**. This is significantly lower than the proportion who responded this way last year (cf. 34% in September 2023). The figure does, however, remain significantly higher than the GB average (20%), and sub-group analysis highlights vulnerable groups
- 2 in 5 (40%) are **unable to afford an unexpected but necessary expense of £850**, significantly higher than the GB average (24%), and a slightly higher proportion than seen in GM survey results for some time
- 47% of respondents say they have **difficulty affording energy costs,** in line with previous surveys but remaining significantly higher than the Great Britain average (33%). Difficulty in affording energy costs is much lower than at this time two years ago, when 57% of respondents found it difficult to afford these costs (cf. November 2022). It is also lower than the 49% recorded last year in September 2023, though not significantly.
- Long-term trends show volatility among renters in terms of ease of **affording rent**. From November 2022 until September 2023, renters finding it difficult to afford their rent outnumbered those without such difficulties. This situation reversed during the period September 2023 – May 2024, before a further increase in reported difficulty in the most recent two survey waves
- There is more stability among those with **mortgage payments** – with a clearer narrative in terms of the balance between those reporting difficulties in affording mortgage payments, and those (the greater proportion) finding things easier

Cost of living – key findings (2 of 2)

COSTS OF LIVING – GETTING HELP AND ACTIONS TAKEN

The survey explores whether respondents have claimed financial barriers to claiming support, and reasons/barriers for this not being the case (with a particular focus on respondents' awareness of the support offers available). Key findings as follows:

- Around a quarter (26%) of respondents have claimed financial support over the last 12 months, with 2 in 3 (68%) not claiming any financial support
  - Those who are more likely to have claimed financial support include those with caring responsibilities (46%), those with a disability (42%) and renters (37%)

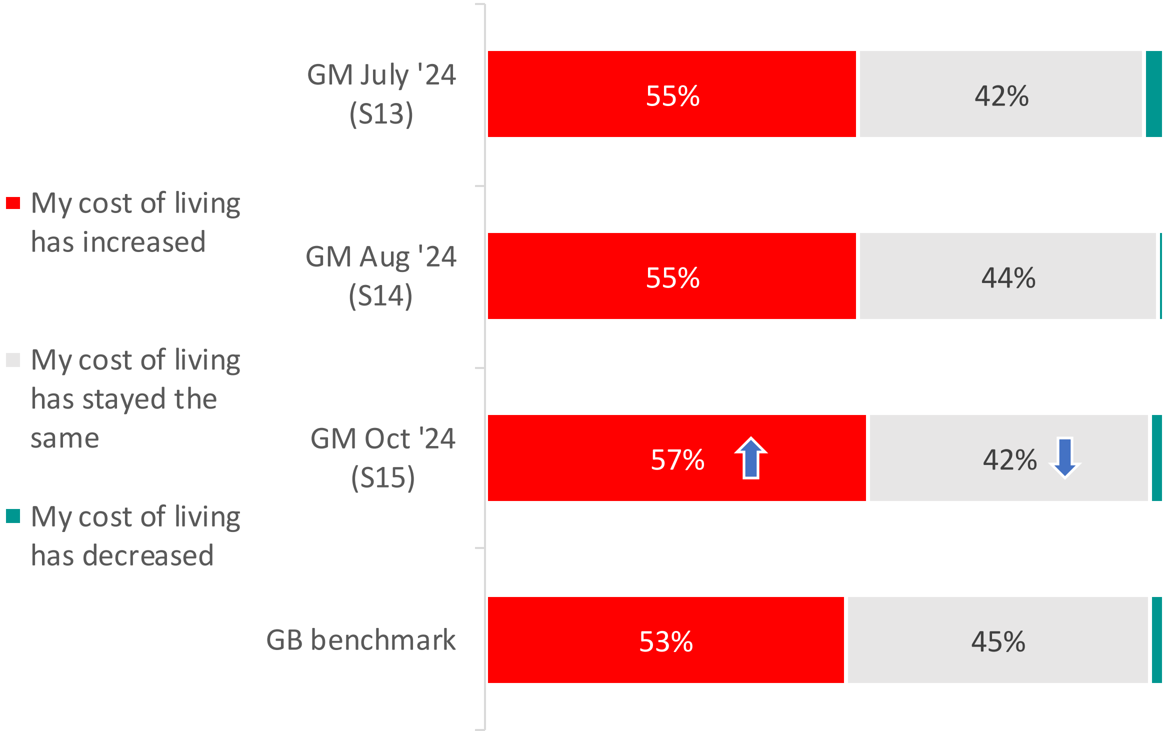
- 2 in 5 (41%) of those who have not claimed financial support say this is because they are not eligible (41%) whilst 30% say this is because they earn too much to claim it and 22% cite not needing it
- Almost a fifth (17%) say they were unsure if they could claim it, and this is highest among young adults, with teenage children and those in full time employment
- 7% say they were unsure how to claim it, higher among Black respondents, 4+ person households and renters
- Those renting from a Local Authority, 16-24-year-olds and those with a disability are more likely to say they have not seen communications about financial support

- In relation to different named forms of financial support, 4 in 5 respondents are aware of free school meals (84%), blue badges (81%) and housing benefit (80%)
- Compared to the first time this question was asked in March 2023, awareness of free school meals, council tax discounts, council tax reduction or support, student support, local welfare assistance schemes, support with energy assistance schemes, household support fund and support for Mortgage Interest are all significantly lower over the July – October 2024 period

- More broadly, the survey latest insights on the actions that GM respondents are taking in response to cost of living pressures, see Annex for full details:
  - GM respondents are more likely to be cycling more to save money than they were in August (7% cf. 5%)
  - However, they are also less likely to be cutting back on non-essential journeys on public transport (16% cf. 19%), shopping less on non-essentials (51% cf. 56%), shopping around more (43% cf. 48%), shopping less on food shopping or essentials (36% cf. 39%

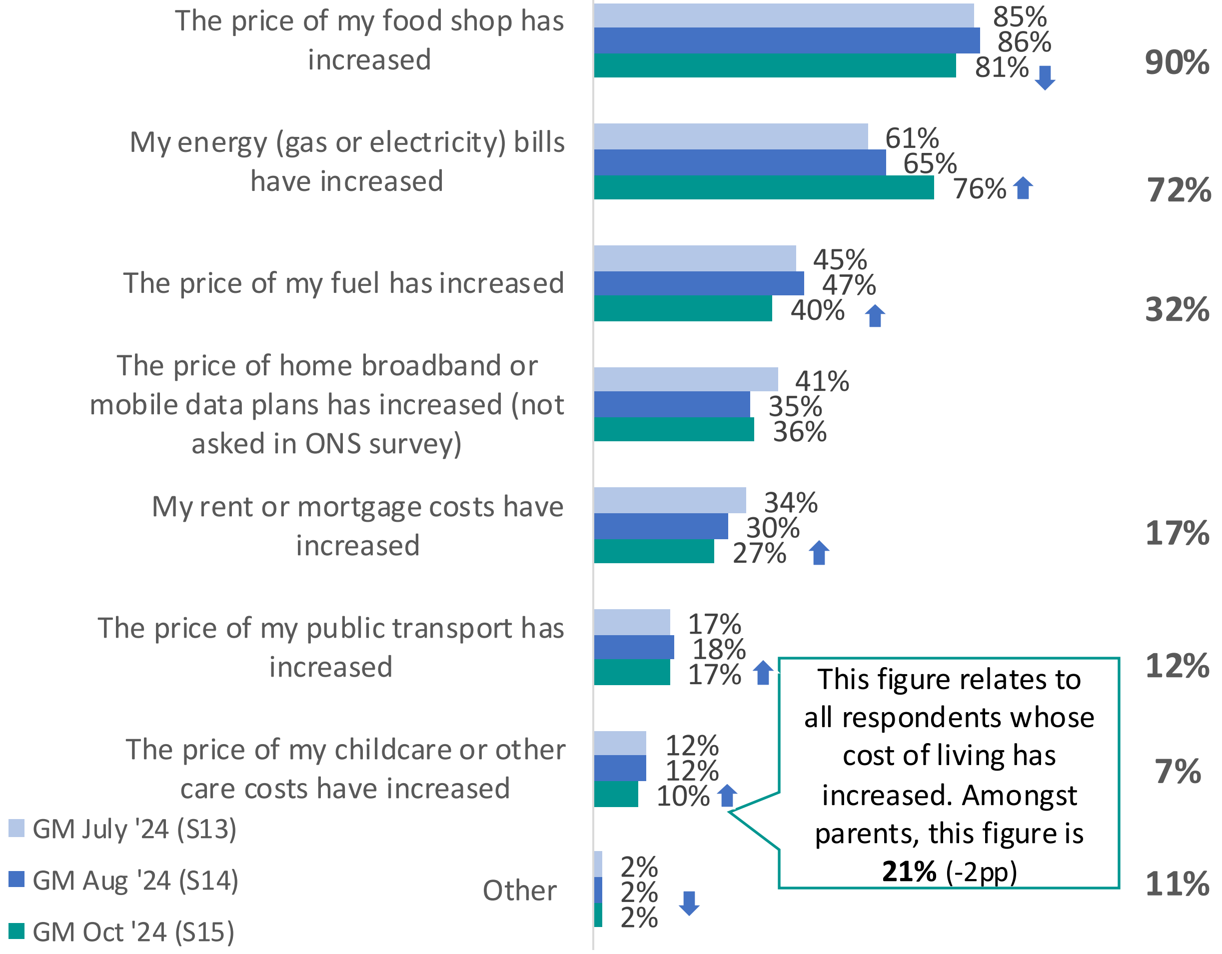
Over half of respondents (57%) say their cost of living has increased in the last month, remaining significantly higher than the GB average (53%). GM respondents are more likely than those in ONS surveys to report recent increases in energy, fuel, rent/mortgage cost, public transport costs and childcare costs – as also seen in previous waves

Change in cost of living over the last month



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

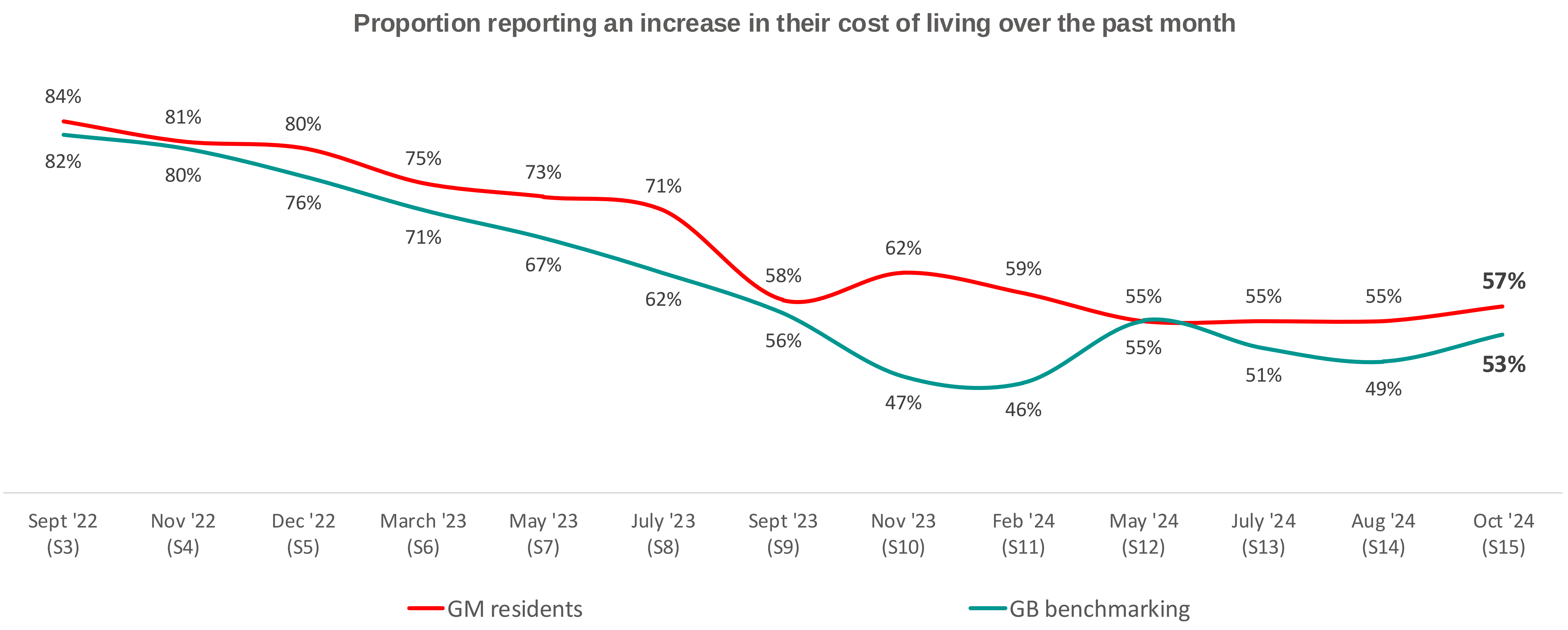
GB average



Significantly higher/lower than the GB Benchmark

CL5. Has your cost of living changed compared to one month ago? CL6. Over the last month, in which ways has your cost of living increased? Base: S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517 (All respondents); S12, 854; S13, 836; S14, 824; S15, 862 (All whose cost of living has increased). ONS data, based on national fieldwork 2 to 27 October 2024

The gap recorded between GM and the GB average continues – currently 4pp (57% vs 53%) – notwithstanding notable short-term increases in the GB average since the summer

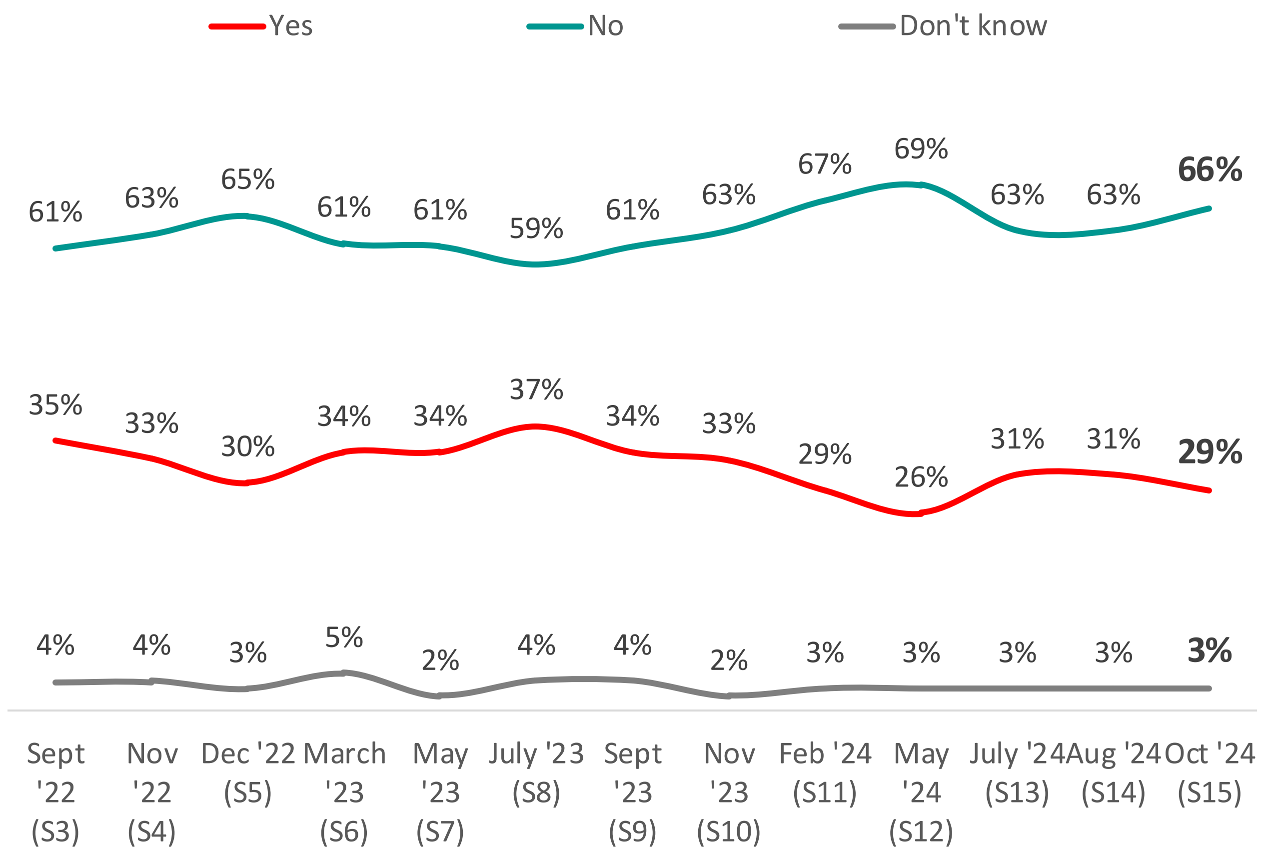


*changes to the ONS wider survey methodology have contributed to a shift in the GB benchmarking since the last GM Residents' Survey

CL5. Over the last month, has your cost of living changed? Unweighted base: S5, 1470; S6, 1767; S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 146; S12, 1551; S13, 1540, S14, 1482; S15, 1517 (All respondents)

Around one in three respondents (29%) say that they have had to borrow more money or use more credit in the last month, compared to a year ago. This is significantly lower than the proportion who responded this way last year (cf. 34% in September 2023). The figure does, however, remain significantly higher than the GB average (20%), and sub-group analysis highlights vulnerable groups

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



⬆⬇ Significantly higher/lower than S14

Between July and October (S13-15). Those who have borrowed more money or used more credit than usual in the last month, compared to the GM average (30%), are higher among:

Subgroups that continue to feature significantly:

- Those with low levels of life satisfaction (48%)
- 25-34-year-olds (43%)
- Those not in work due to ill health or disability (42%)
- Those with a disability (40%) including those with mental ill health (48%) or a learning disability (52%)
- Renters (39%), including those renting from Housing Associations or Trust (43%)
- Respondents from Minority Ethnic Groups (35%)*, including Pakistani respondents (48%)*

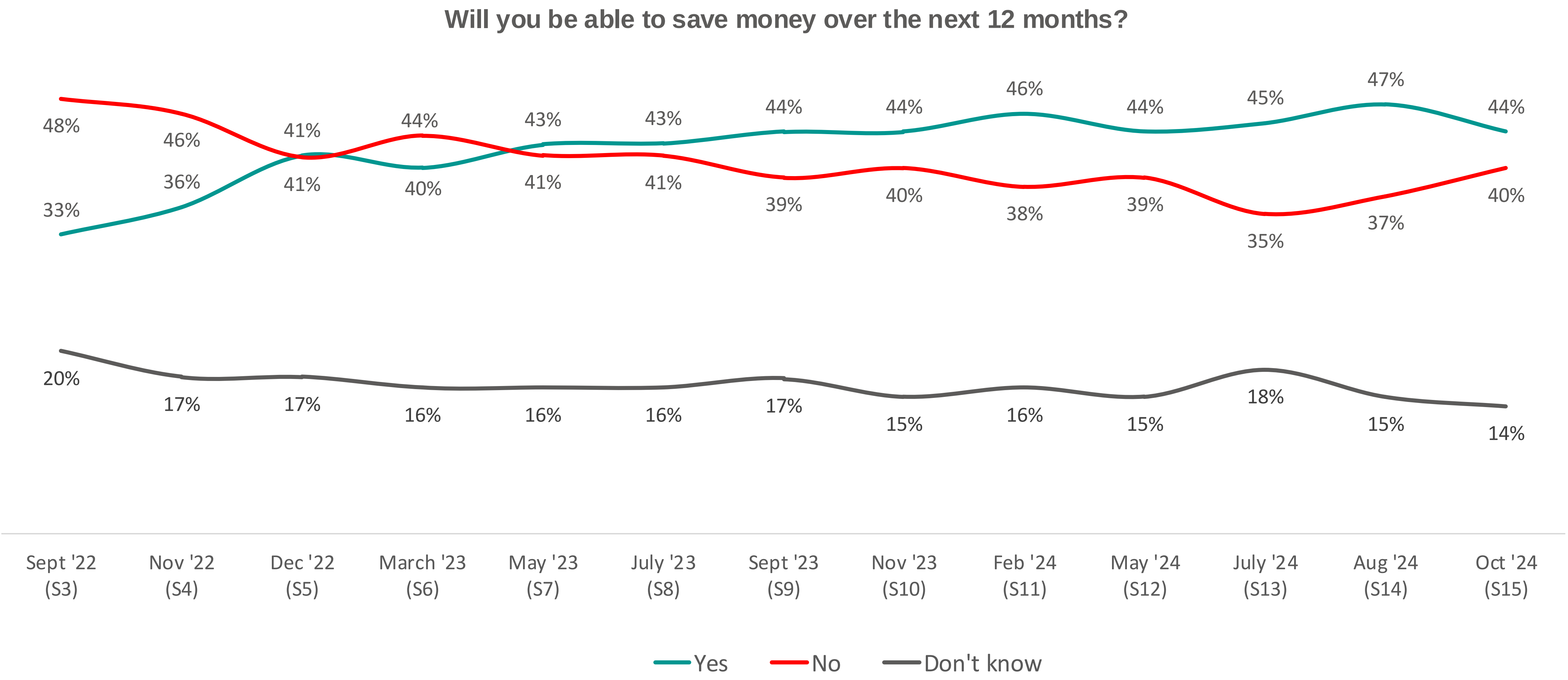
New subgroups found in analysis:

- *Those who often/always have high levels of stress or pressure at work (54%)*
- *Those unable to look after their own health (52%)*
- *Gay women or lesbians (49%)*
- *Females under 40 with children under 5 (47%)*
- *Those using any funded childcare schemes (45%)*
- *Those who claimed financial support (44%)*

*subgroup analysis uses S13-15 data.

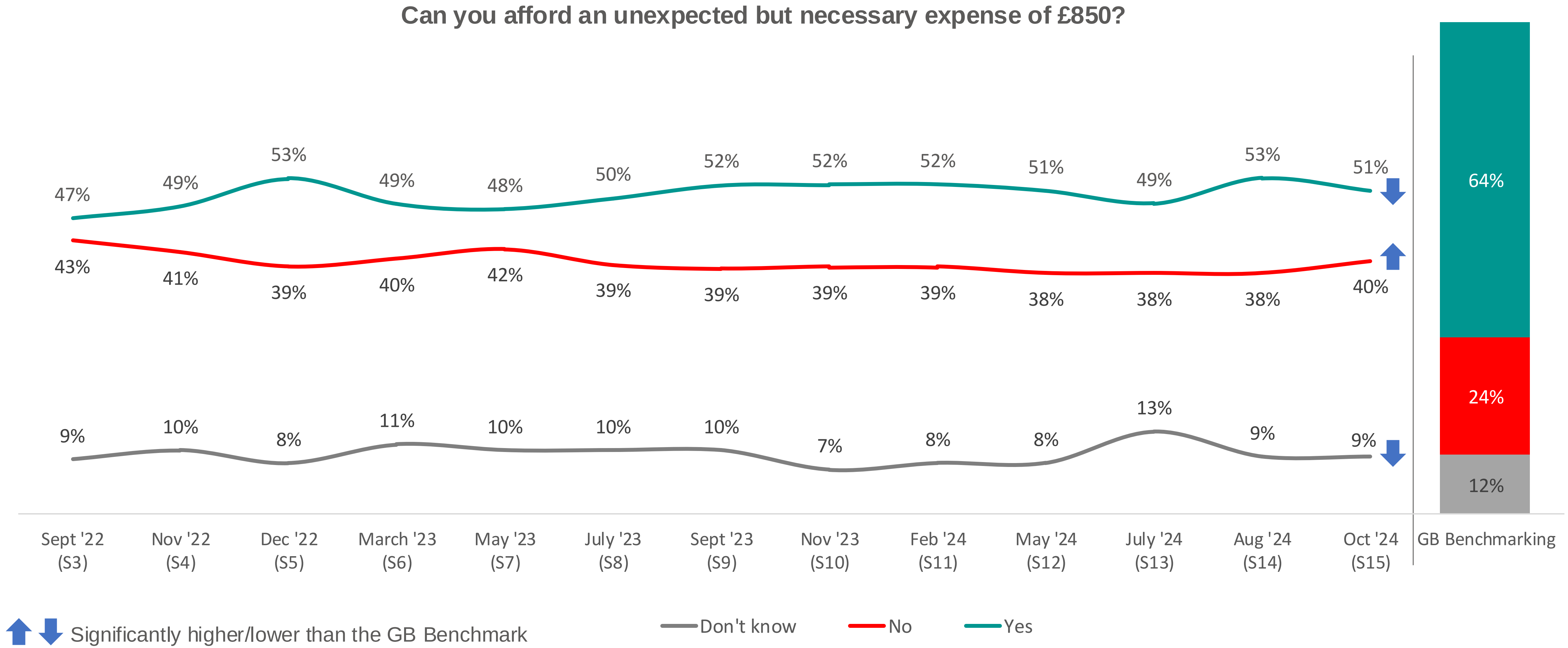
CL3. Have you had to borrow more money or use more credit than usual in the last month, compared to a year ago? Unweighted base: S5, 1470; S6, 1767; S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517 (All respondents);

44% of respondents feel they would be able to save money over the next 12 months, while 40% do not think that they would be able to do so



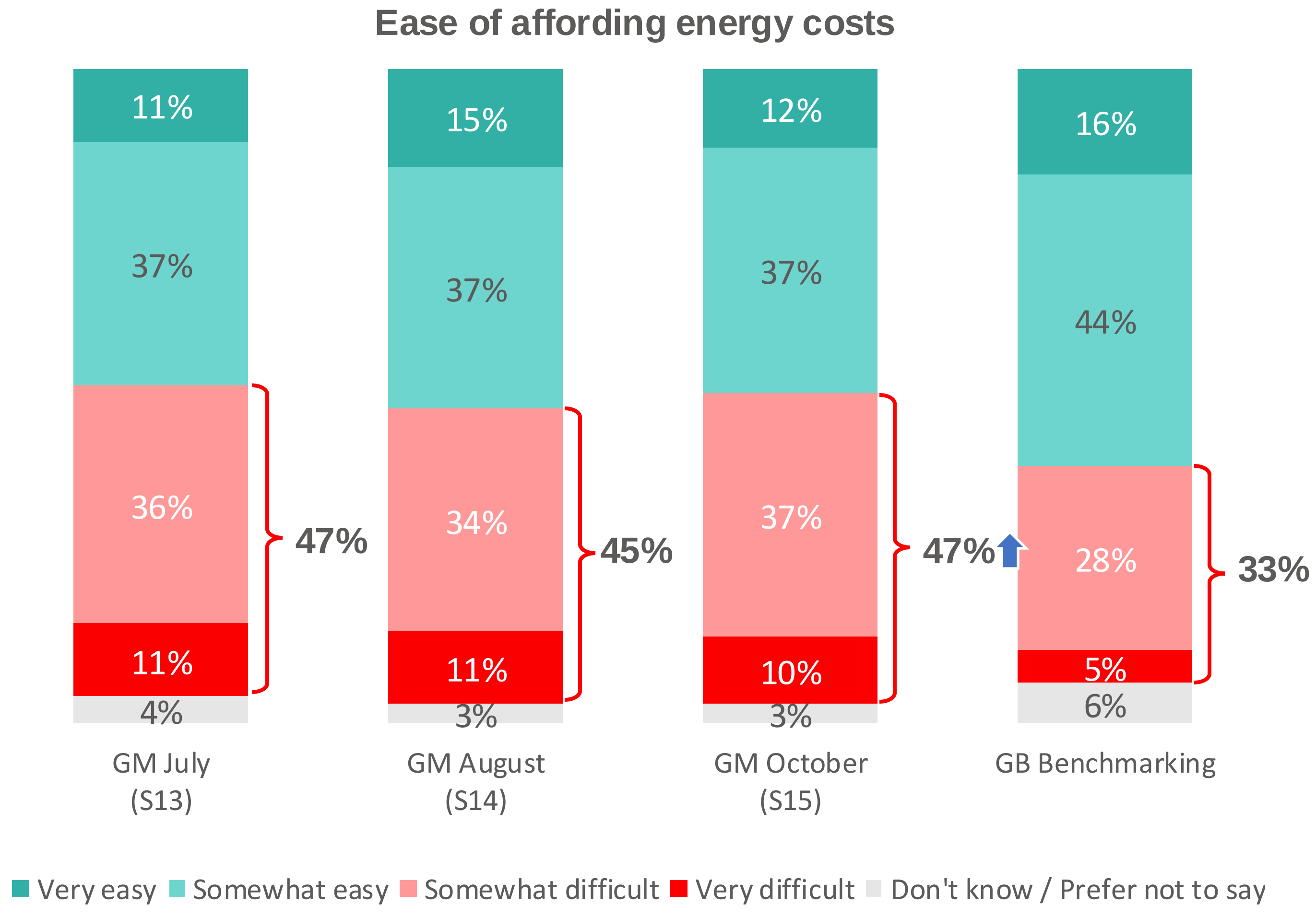
CL1. In view of the general economic situation, do you think you will be able to save any money in the next 12 months?
Unweighted base: S3, 1677; S4, 1636; S5, 1470; S6, 1767; S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517 (All respondents).

2 in 5 (40%) are unable to afford an unexpected but necessary expense of £850, significantly higher than the GB average (24%), and a slightly higher proportion than seen in GM survey results for some time



CL2. Could your household afford to pay an unexpected, but necessary, expense of £850? Unweighted base: S3, 1677; S4, 1636 S5, 1470; S6, 1767; S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540, S14, 1482; S15, 1517 (All respondents). ONS data, based on national fieldwork 2 to 27 October 2024

47% of respondents say they have difficulty affording energy costs, in line with previous surveys but remaining significantly higher than the Great Britain average (33%). Sub-group analysis draws out both familiar and new vulnerable groups, highlighting several important equalities perspectives



Significantly higher/lower than the GB Benchmark

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

Subgroups that continue to feature significantly:

- Those with a disability (62%) including those with a mobility or sensory disability (61%) or mental ill health (75%)
- Those from within racially minoritised communities (56%), including Asian or Asian British respondents (59%)
- Those not in work due to ill health or disability (78%)
- Those renting their homes (59%) including from a Local Authority/ Council (65%), Housing Association / Trust (66%), or privately (53%)

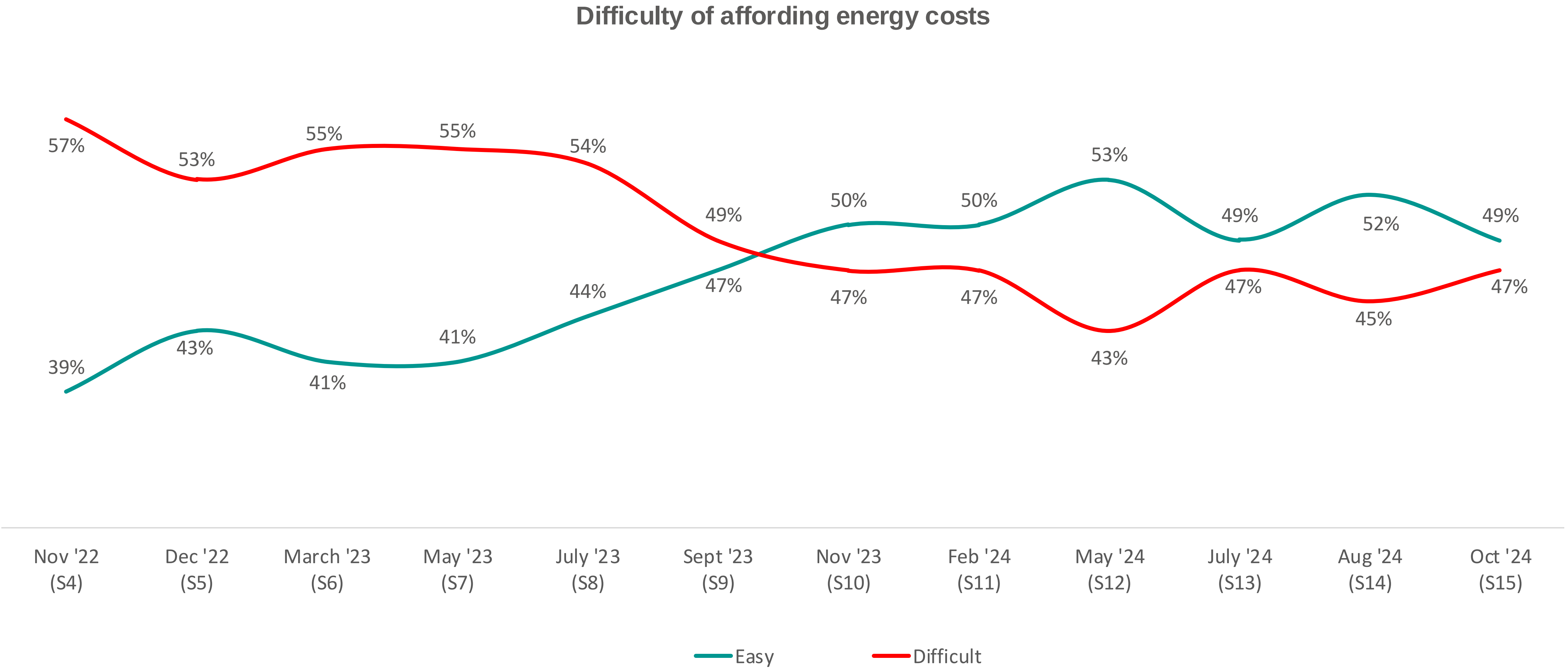
New subgroups found in analysis:

- Those with very low levels of hopefulness (73%)
- Those unable to save money over the next year (70%)
- Those who disagree they know enough about their own health (69%)
- Those living with friends or family (67%)
- Muslim respondents (64%)
- Those earning below the Real Living Wage (63%)
- Those who disagree that people from their local area look out for each other (59%)

*subgroup analysis uses S13-15 data.

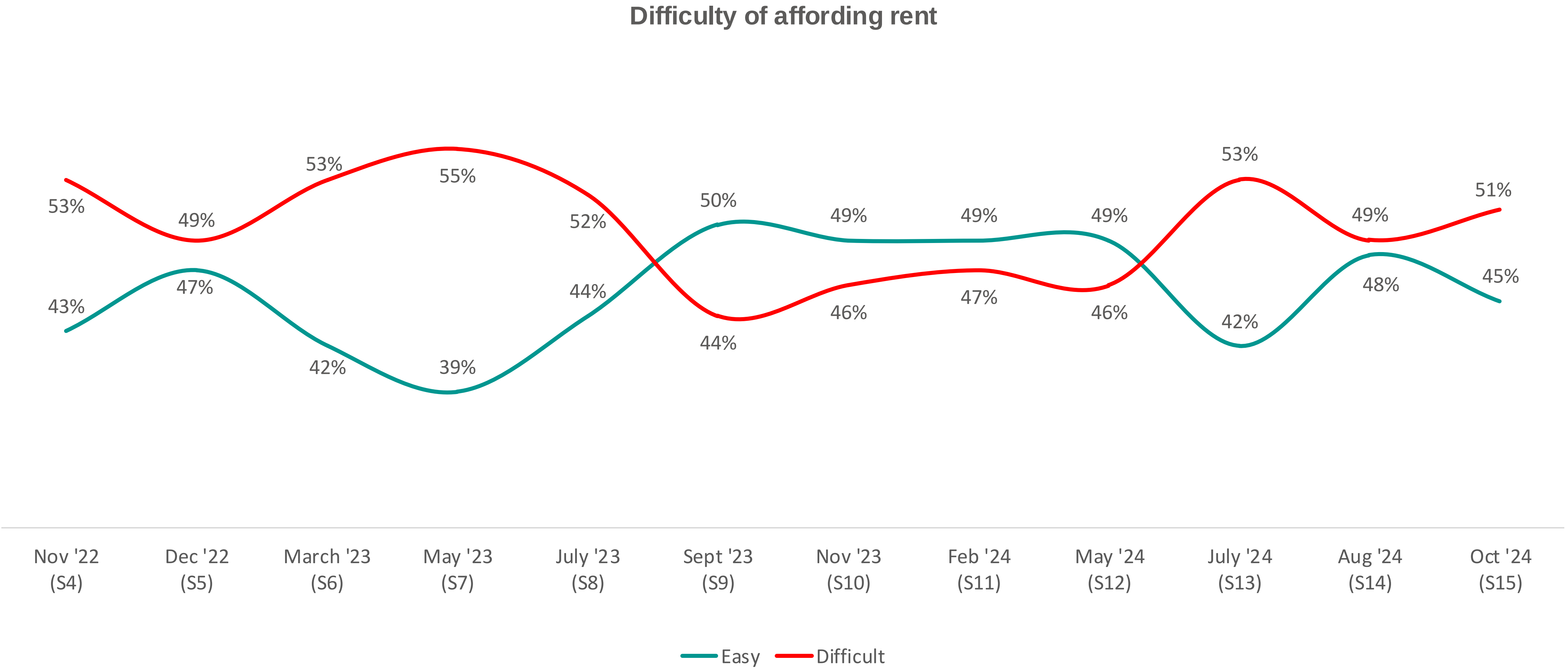
CL9. How easy or difficult is it to afford the following? Unweighted base: Survey 13, 1471; Survey 14, 1423; Survey 15, 1517 (All respondents who pay their energy costs). ONS data, based on national fieldwork 2 to 27 October 2024

Long-term trends continue to show that since September 2023, respondents are more likely to find it easier than difficult to afford their energy costs – though both hover at around 50%



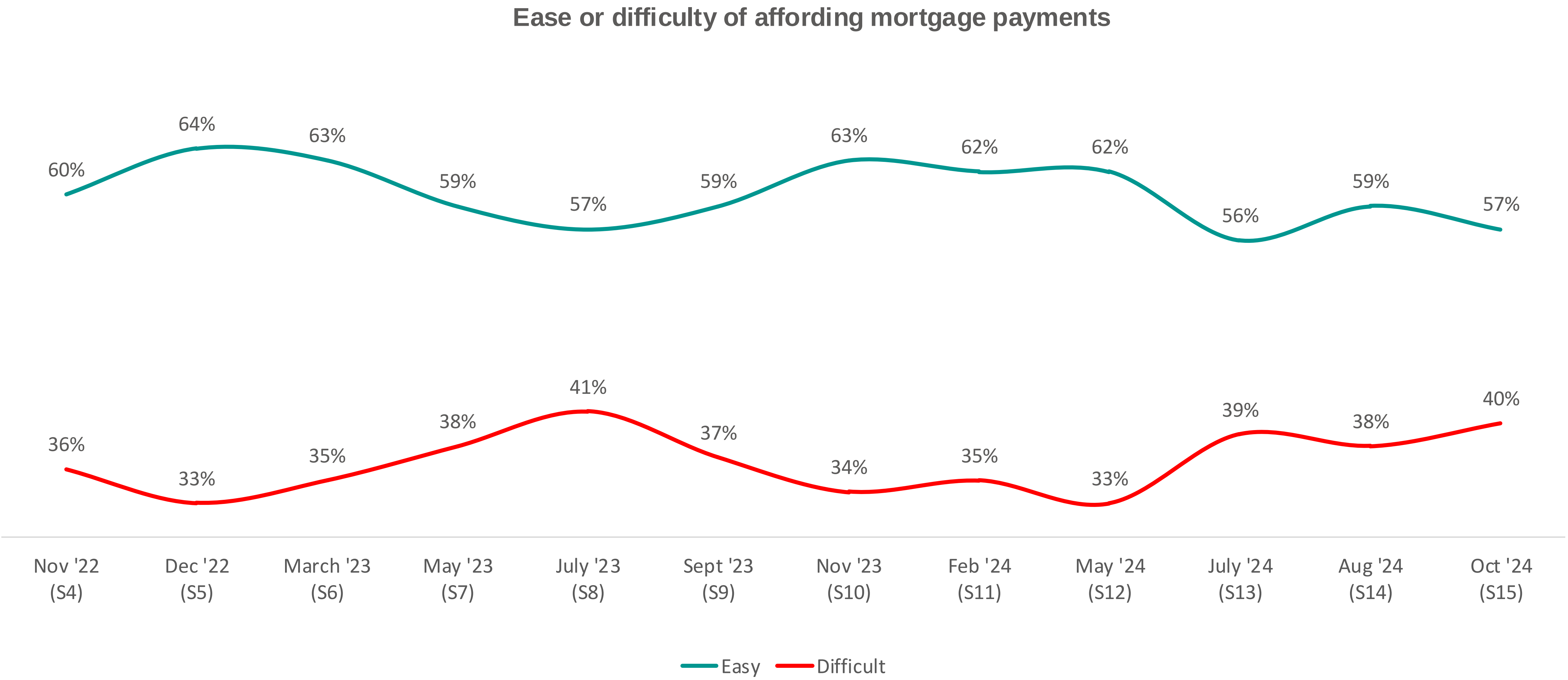
CL9. How easy or difficult is it to afford your…
Unweighted base: S4, 1569; S5, 1424; S6, 1708; S7, 1426; S8, 1561; S9, 1497; S10, 1488; S11, 1403; S12, 1497; S13, 1471; S14, 1423; S15, 1444 (All who pay energy costs)

Long-term trends continue to show volatility among renters in terms of ease of affording rent. In October 2024, the gap between renters finding it easy and difficult to afford their rent has started to widen again – though there are no significant movements



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

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



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

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

% who are significantly more likely to find it difficult to afford mortgage payments compared to the GM average (39%):

Subgroups that continue to feature significantly :
- Those aged 16-24 (61%)
- Those with low levels of happiness (61%)
- Those who feel they are treated unfairly in society (59%)
- Those in racially minoritised groups (50%), including Asian or Asian British respondents (58%)
- Those who have had to borrow money or use more credit in the last month (58%)
- Those with low levels of life satisfaction (57%)
- Those earning below the Real Living Wage (54%)
- Those with high levels of anxiety (49%)

New subgroups found in analysis :
- Those who are financially vulnerable (74%)
- Those who are unable to save money in the next year (59%)
- Those who have claimed financial support (58%)
- Those who disagree they know enough about their own health (57%)
- Those dissatisfied with their work hours (56%)
- Those with a condition that reduces their ability to do activities by a lot (54%)

% who are significantly more likely to find it difficult to afford rent compared to the GM average (51%):

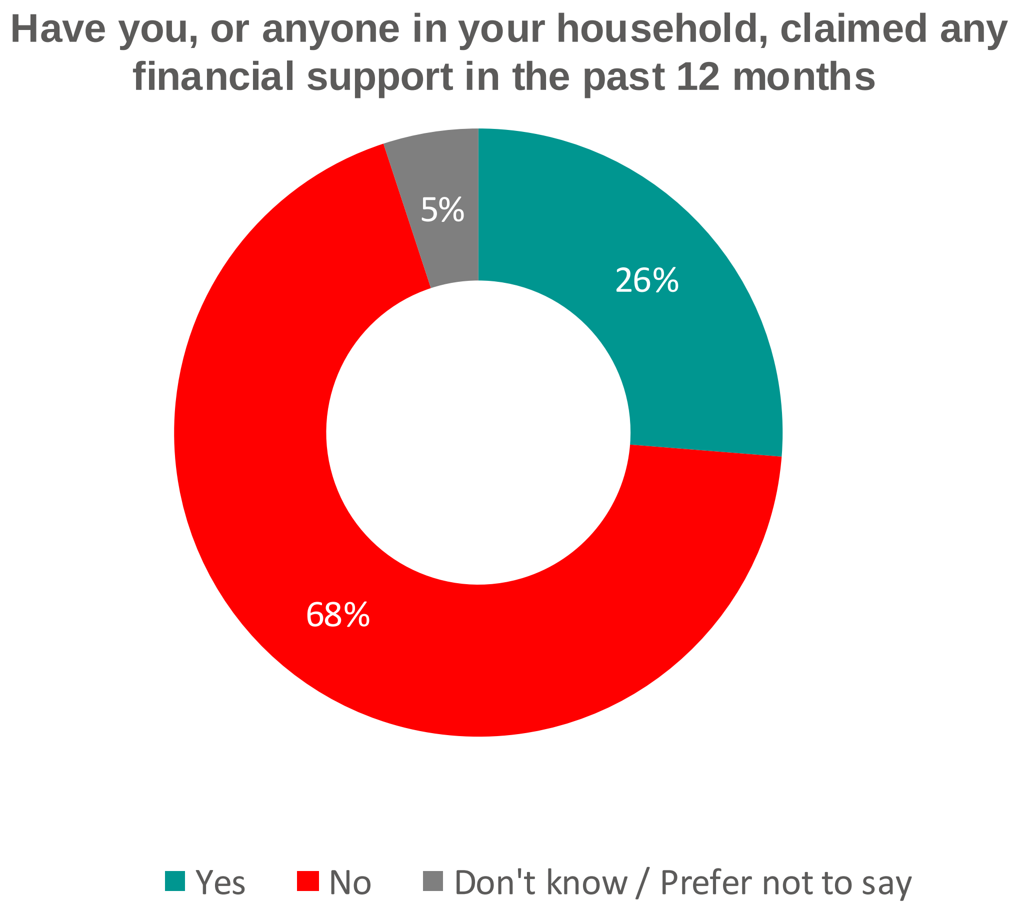
Subgroups that continue to feature significantly:
- Those who disagree they are able to look after their own health (64%), or know enough about their own health (63%)
- Those who do not feel able to save any money in the next 12 months (63%)
- Those in racially minoritised groups (62%), including Asian or Asian British respondents (63%)

New subgroups found in analysis:
- Those who are financial vulnerable (75%)
- Parents with 19-25-year-olds in the house (70%)
- Those with low levels of hopefulness (66%)
- Those whose pay does not fairly reflect their work (63%)
- Those who have had to borrow money or use more credit in the last month (63%)
- Those earning below the Real Living Wage (52%)
- Those with low levels of life satisfaction (61%)
- Those whose cost of living changed in the last month (61%)
- Those who would not recommend their local area (61%)
- Those who first language is not English (60%)

Subgroup analysis uses merged data from S13-15 combined

CL9. How easy or difficult is it to afford your...
Unweighted base: Greater Manchester Residents Surveys 13-15, 1160 (All with a mortgage); 1378 (All renters)

Just over a quarter (26%) of respondents have claimed any financial support in the last 12 months.



Respondents who have claimed financial support in the last year at significantly higher rates compared to the GM average (26%):

Demographics:

- Those with caring responsibilities (46%), or previously did (43%)
- Parents with children in early years education (45%), or college (41%)
- Those with a disability (42%), including those with mental ill health (50%), other disability (45%), a mobility disability (42%)
- Parents using any funded childcare schemes (41%)
- Renters (37%), including those renting from a local authority / council (40%), housing association or trust (40%),

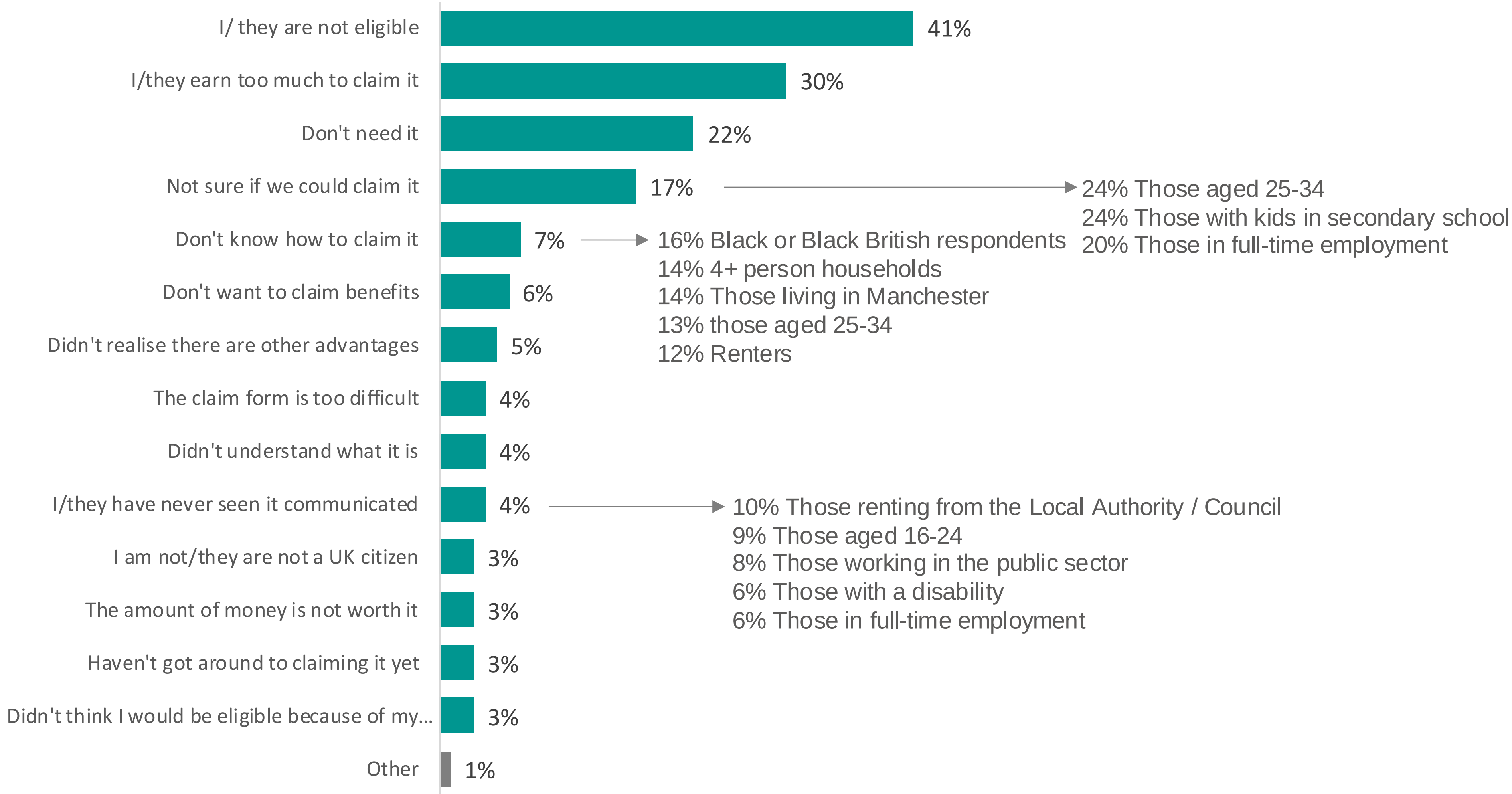
Individual and/or family circumstance:

- Those who have volunteered or donated to a baby bank (60%)
- Those not in work due to ill health or disability (49%), or homemakers (42%)
- Those earning below the Real Living Wage (47%)
- Those who disagree they know enough about their own health (42%)

FS1. Have you, or anyone in your household, claimed any financial support in the past 12 months (including but not limited to pension credits, free school meals, council tax reduction etc)?
Unweighted base: 1517 (All respondents)

Financial support is often means tested and this is reflected in the top three reasons why people have not claimed such support: i.e. they were not eligible (41%), they earn too much to claim it (30%) or they don't need it (22%). Beyond this, the main barrier to claiming financial support is knowledge

Among those who have not, why have you not claimed financial support? (n=1,052)

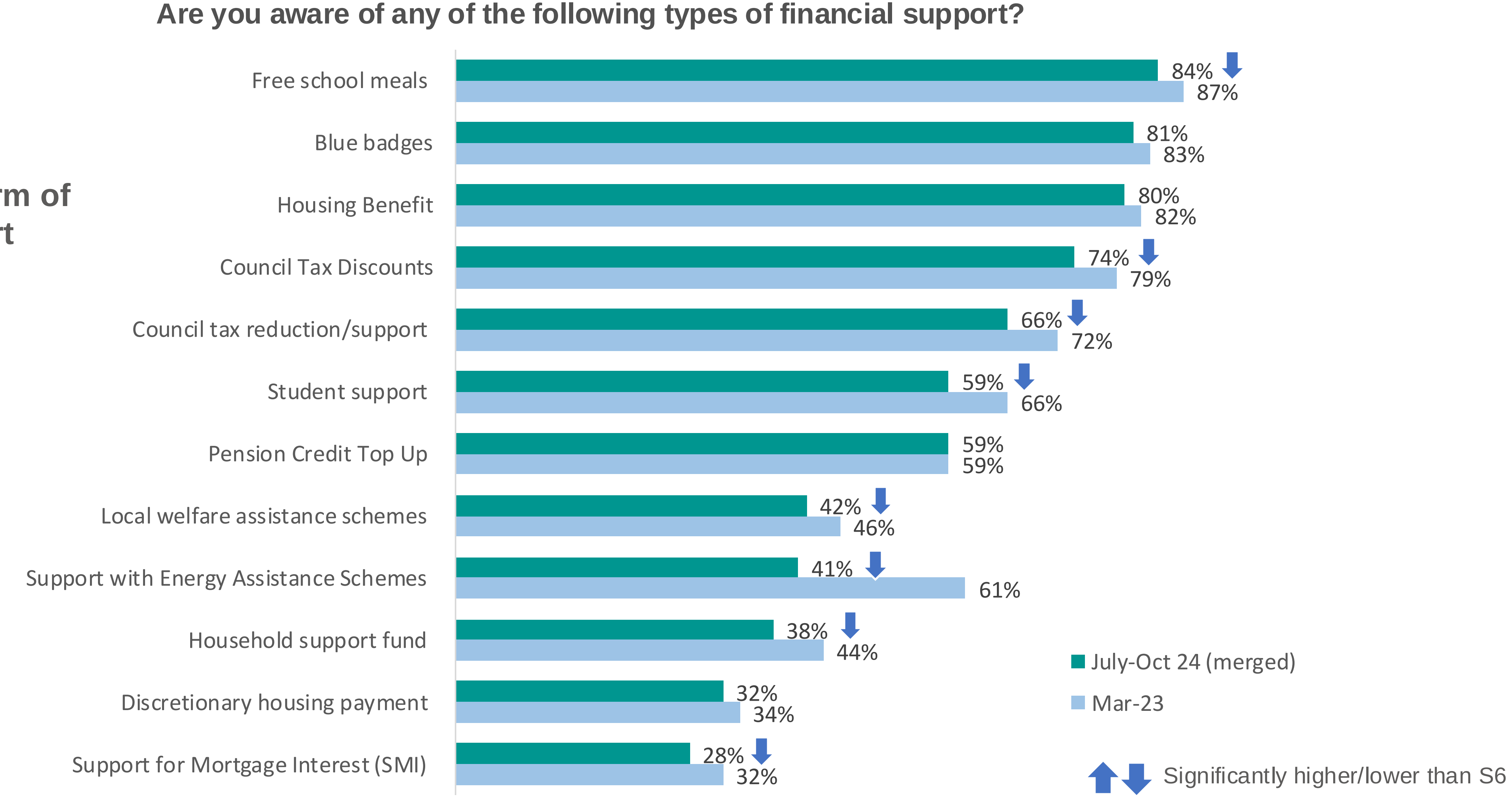


FS2. Which of the below reasons best describe why you or anyone in your household do not claim any of these? Unweighted base: 1052 (All who do not claim financial support)
Only codes above 3% shown

Most forms of financial support are known by GM respondents, with some fluctuations since this question was last asked in March 2023. However, awareness of several forms of financial support have fallen significantly since just over 18 months ago in March 2023 (this includes Council Tax Reduction and Support with Energy Assistance)

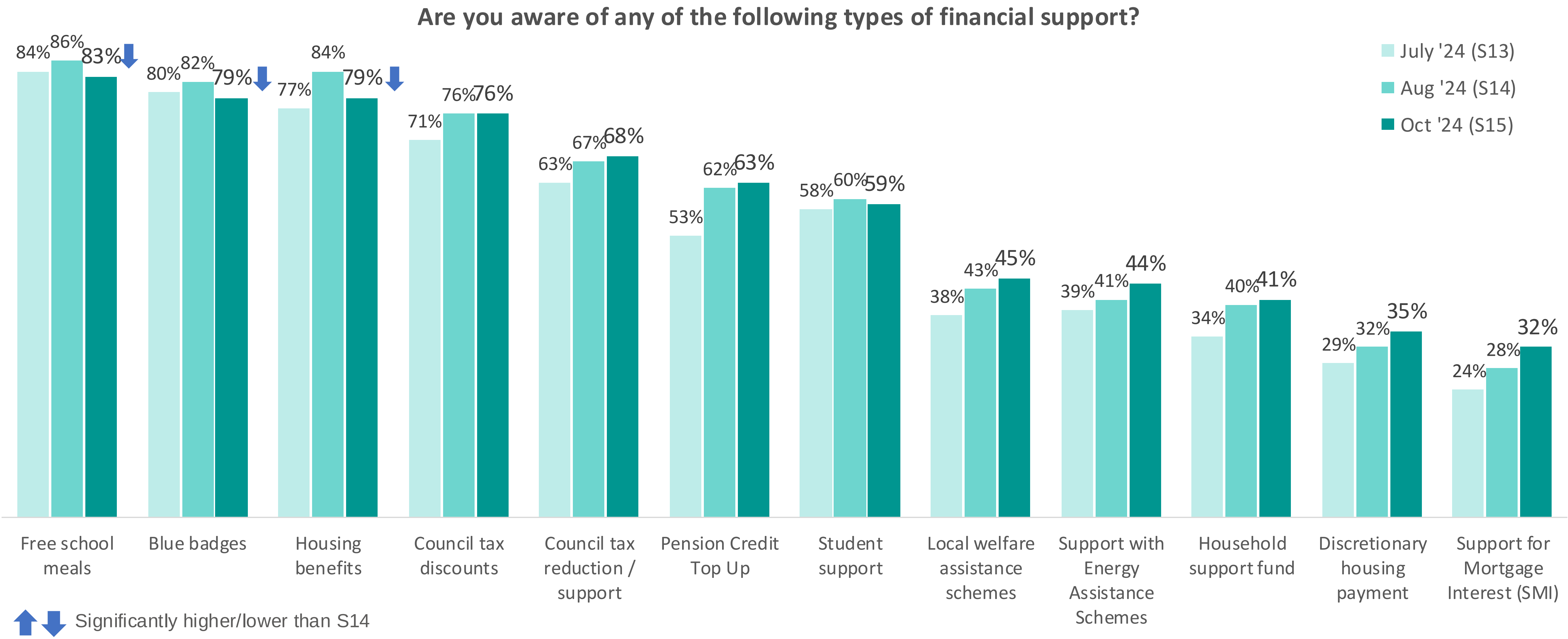
96%

are aware of any form of financial support



CL21. The following question asks about income maximisation. Are you aware of any of the following types of financial support?
Base: Survey 6, 1767; Surveys 13-15, 4539 (All respondents)

Looking at awareness of financial support over the last three surveys, awareness of free school meals, blue badges and housing benefits has fallen significantly since August. However, awareness still sits at around 4 in 5 for these types of financial support



CL21. The following question asks about income maximisation. Are you aware of any of the following types of financial support?
Base: S13, 1540; S14, 1482; S15, 1517 (All respondents)

Digital inclusion

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

Unweighted base: 756 (Face to face respondents S13+S14+S15)

Digital inclusion – context

Sampling

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

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

Merged Findings

For this report, we have merged findings for survey 15 (October 2024) with those from survey 14 (August 2024) and survey 13 (July 2024) to provide a robust sample size for sub-group analysis. All three surveys have used a face-to-face interview approach.

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

** Base sizes: Survey 13 (250), Survey 14 (240), Survey 15 (266)*

---

*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 13+14+15 combined data*)

- Since May, over a third (36%) of respondents have said that their household experiences some form of digital exclusion. This is in line with the proportion that was seen in surveys 10-12 (36%). Interviews are now conducted face-to-face, whereas previously they were telephone based
- It appears that the proportion of respondents experiencing any form of digital exclusion overall has remained stable, however, there have been increases in digital exclusion amongst 16–24-year-olds, those 75+ and disabled respondents. Methodological change is, however, likely to be impacting this data - this is because those who are recruited to take part in telephone research are often recruited through online methods, meaning there was a lesser chance in historical GM surveys of recruiting who are digitally excluded vs. our current approach of face-to-face interviewing on the doorstep
  - 73% of those aged 75+ now say they have experienced one or more aspect of digital exclusion, compared to 70% in surveys 10-12
  - 59% of disabled respondents report experiencing at least one form of digital exclusion, rising from 56% in surveys 10-12
  - 32% of 16–24-year-olds now say they have experienced one or more aspect of digital exclusion, higher than the 27% reported in surveys 10-12
- The extent / nature of this digital exclusion can be expressed by reviewing whether respondents have issues relating only to one aspect of exclusion or many (from a list** including: consistent/reliable internet connection; suitable devices; affordability; digital skills; access to support). 9% of Greater Manchester households have experienced a single aspect of digital exclusion. A similar proportion (10%) have experienced all 5 aspects of digital exclusion

CONFIDENCE USING DIGITAL SERVICES (survey 13+14+15 combined data)

- 22% of respondents say either they (17%) or someone in their household (13%) is not confident using digital services online – in line with July's results
  - Subgroup analysis based on responses combined from S13-15 continue to show confidence is lacking amongst older cohorts aged 75+ (71%) and disabled respondents (40%)

** Base sizes: Survey 13 (250), Survey 14 (240), Survey 15, 266*

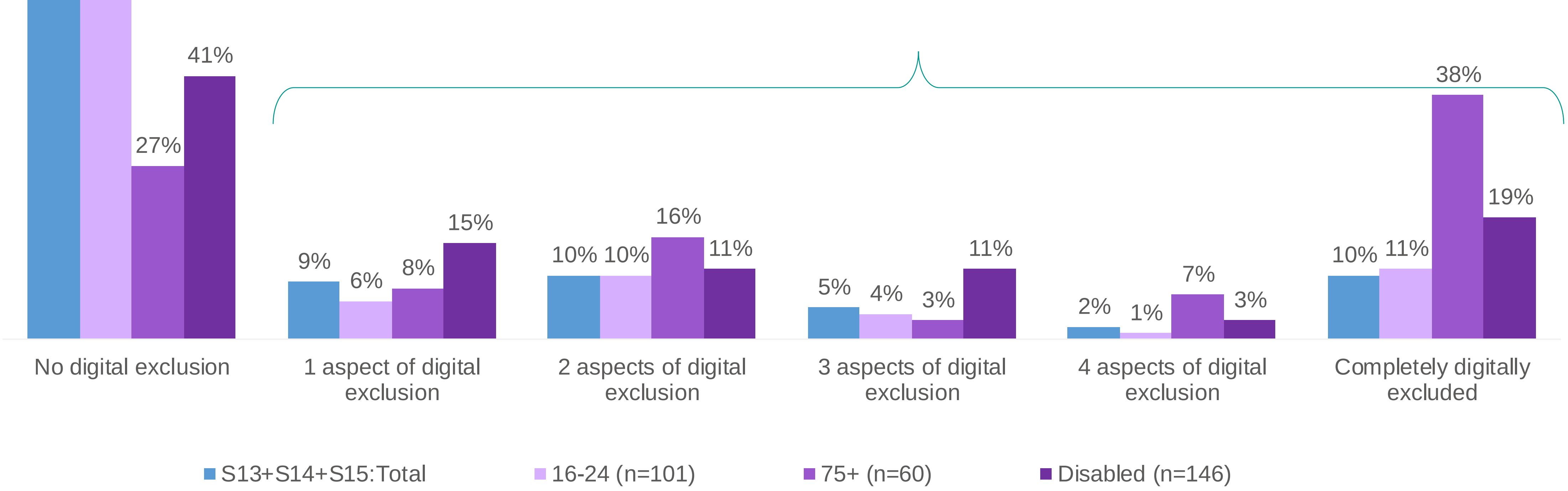
***The five aspects of digital exclusion relate to: (I) consistent and reliable access to an internet connection at home; (II) to devices that allow access to the internet; (III) affording access to the internet; (IV) skills needed to access and use digital services online; (IV) support needed to access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

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

Number of aspects of digital exclusion experienced (July - October 2024)

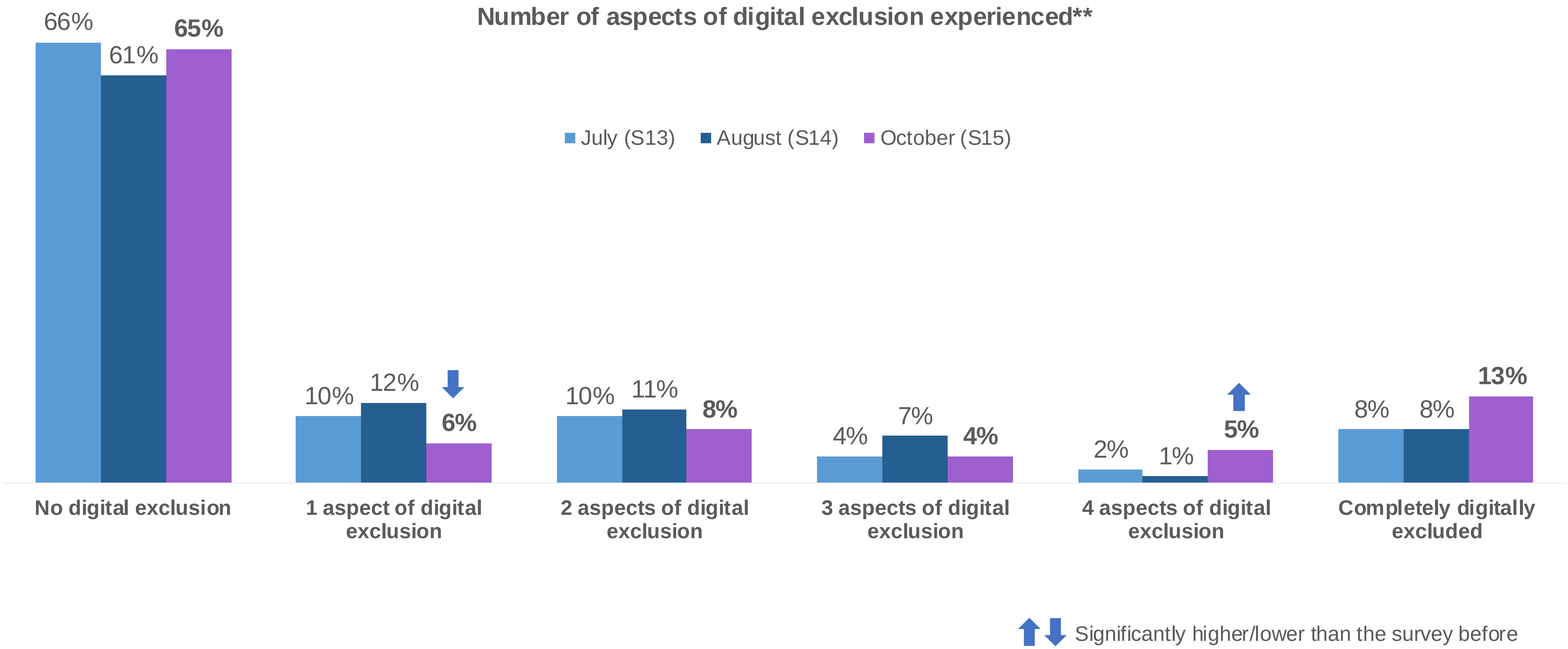
1 or more aspect of digital exclusion ...

Total	16-24	75+	Disabled
36%	32%	73%	59%



DI11. How often…? Unweighted base: 756 (Face to face respondents) Prefer not to say not shown. Question in was asked as a grid, between "you" and "others in your household". The data on this slide shows the percentages of households where there is someone (either you or others) who has said they are digitally excluded. *Aspects of digital exclusion = consistent and reliable access to an internet connection at home; to devices that allow access to the internet; affording access to the internet; skills needed to access and use digital services online; support needed to access and use digital services online

Wave-on-wave trends: October shows a significant increase in those who experience 4 aspects of digital inclusion compared to August, and an increase of 5pp in those who experience complete digital exclusion



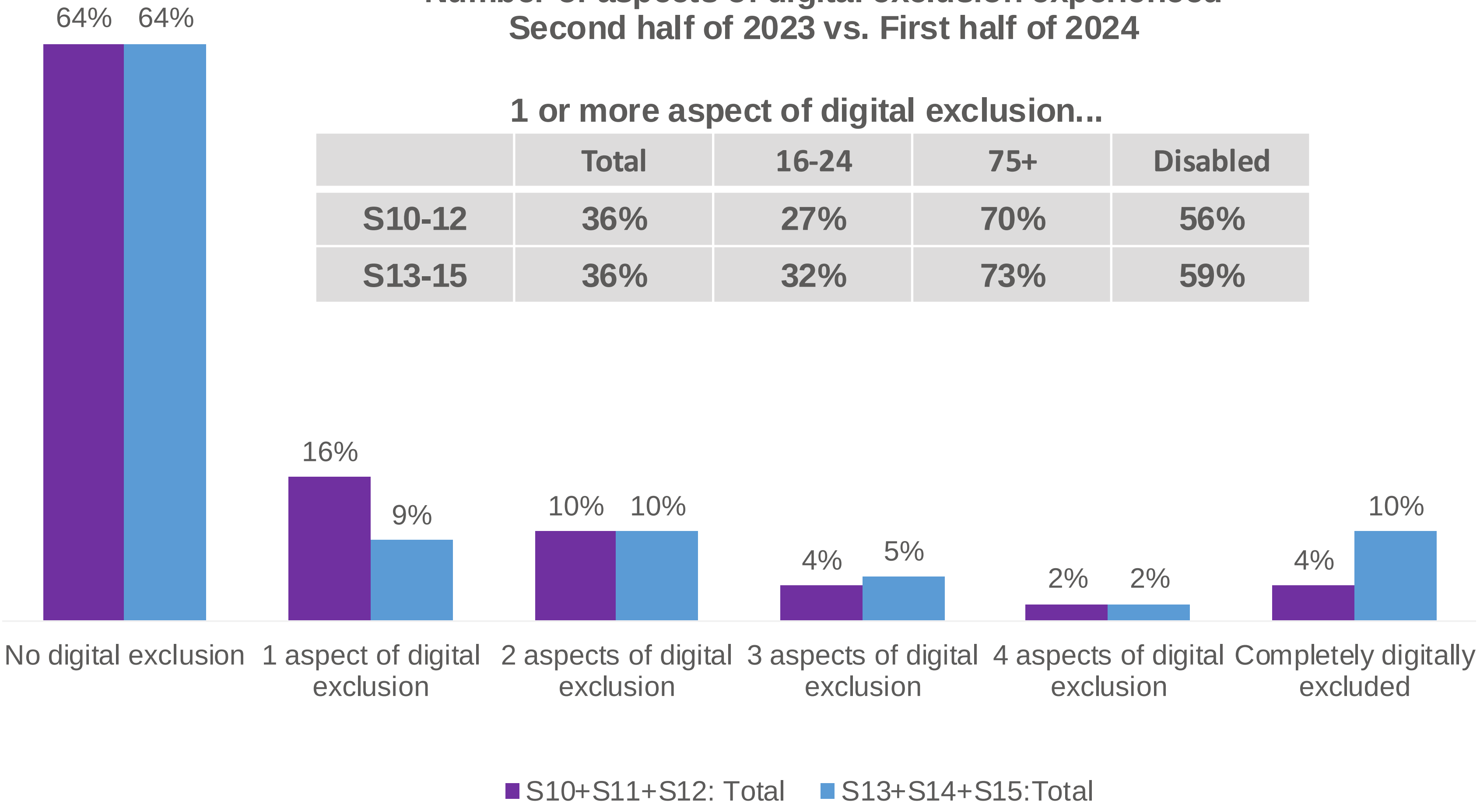
Unweighted base: S13+S14+15, 740; Survey 13, 250; Survey 14, 240, Survey 15; 266 (Face to Face Respondents) **Aspects of digital exclusion = consistent and reliable access to an internet connection at home; to devices that allow access to the internet; affording access to the internet; skills needed to access and use digital services online; support needed to access and use digital services online

Trend over time: It appears that the proportion of respondents experiencing any form of digital exclusion overall has remained stable, however, there have been increases in digital exclusion amongst 16-24 year olds, those 75+ and disabled respondents. Methodological change is likely to be impacting this data*.

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
S10-12	**36%**	**27%**	**70%**	**56%**
S13-15	**36%**	**32%**	**73%**	**59%**



***Change in Methodology**

Survey 15-12 utilise a face-to-face methodology, while survey 11-10 use a telephone approach.

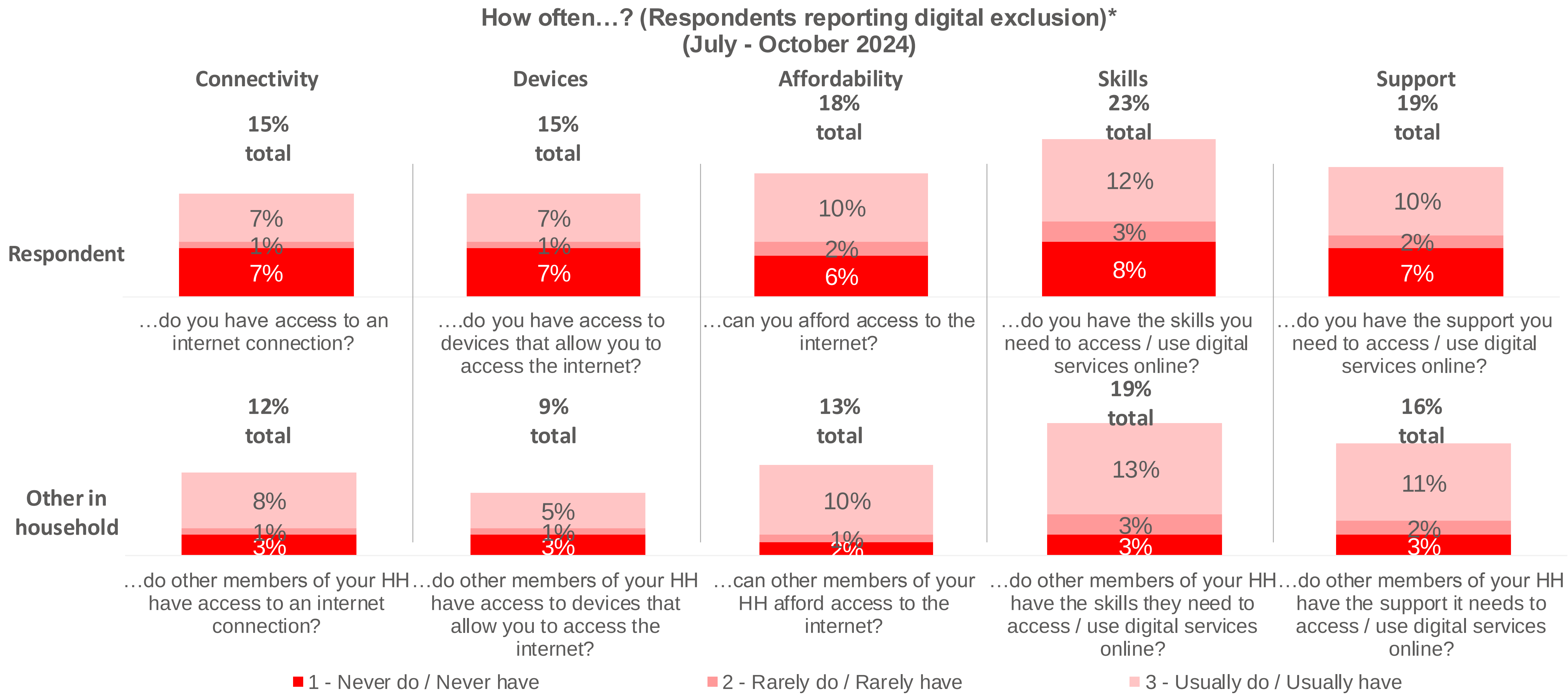
Changes in who we can talk to between the two approaches have impacted the results on this slide.

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

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

DI11. How often…? Unweighted base: S10-12 (760), S12-14 (756) (Face to Face respondents) Prefer not to say not shown. Question in S6 onwards was asked as a grid, between "you" and "others in your household". The data on this slide shows the percentages of households where there is someone (either you or others) who has said they are digitally excluded. Aspects of digital exclusion = consistent and reliable access to an internet connection at home; to devices that allow access to the internet; affording access to the internet; skills needed to access and use digital services online; support needed to access and use digital services online

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



DI_11. How often…? Unweighted base: 756; Survey 13, 250; Survey S14, 240, Survey 15, 266 (Face to face respondents) *Prefer not to say, 4, and 5 (Mostly do / have and Always do / have) not shown.

For another wave, those aged 75+ and disabled respondents continue consistently to be far more likely to lack access to enable "all" or "most" of the time, or the skills and support to do so. This is consistent with previous surveys and with the same time period last year (July – Oct 2023)

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

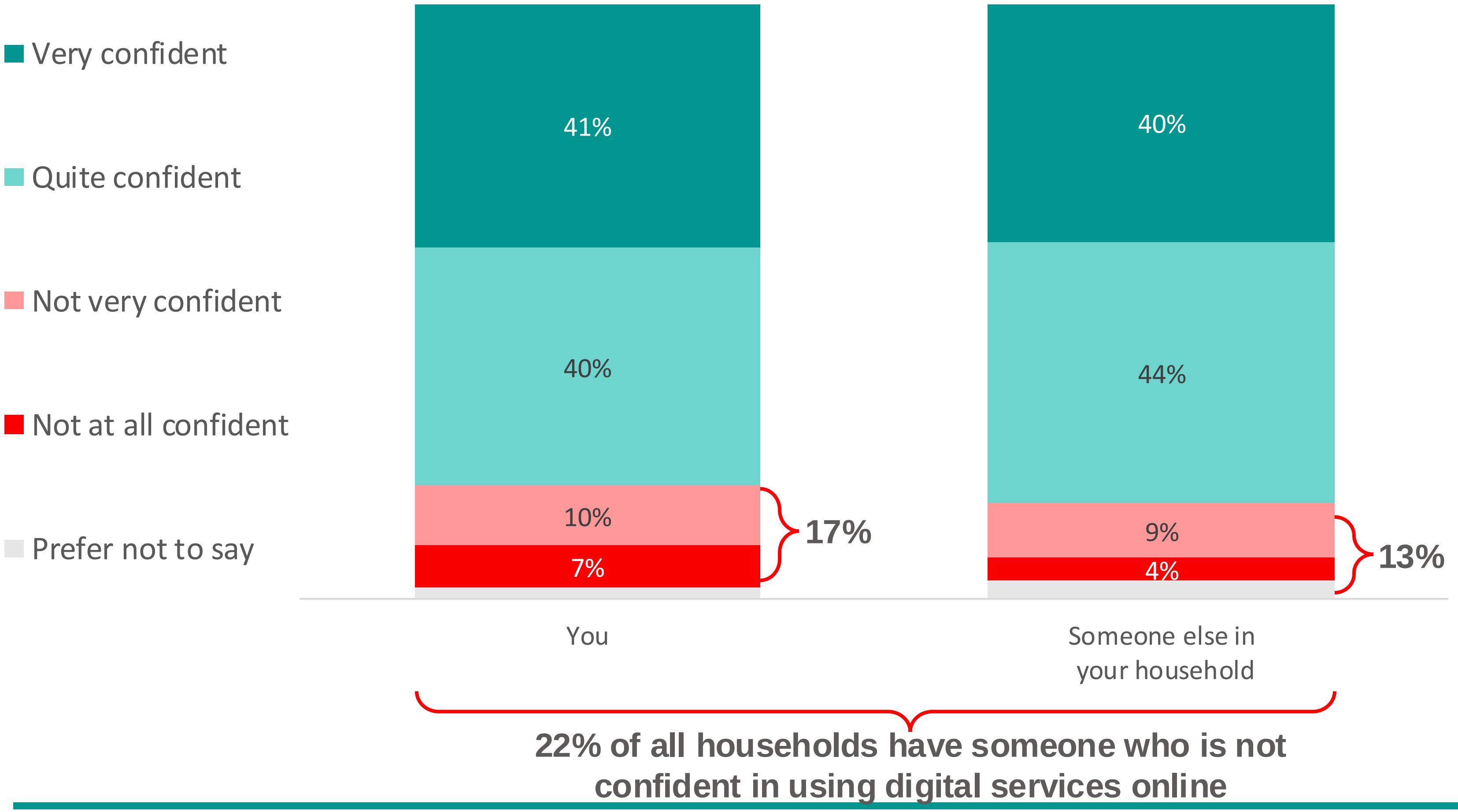
	Total	Aged 16-24 (n=101)	Aged 75+ (n=60)	Disabled respondents (n=146)
…have consistent and reliable access to an internet connection at home?	14%	10%	40% ↑	23% ↑
…have consistent and reliable access to devices that allow access to the internet and use digital services online?	13%	12%	48% ↑	26% ↑
…can afford access to the internet?	17%	12%	46% ↑	36% ↑
…have the skills they need to access and use digital services online?	18%	13%	62% ↑	36% ↑
…have support needed to access and use digital services online?	16%	10%	52% ↑	31% ↑

↑↓ Significantly higher/lower than total

DI_11. How often…? Unweighted base: 756; Survey 13, 250; Survey 14, 240; Survey 15, 266 (Face to face respondents)

Approaching one-fifth of respondents (17%) say they are not confident using digital services online, with over 1 in 10 (13%) saying others in their household are not confident". In combination this equates to a fifth (22%) of households with someone lacking confidence. Those aged 65+ and living alone are more likely to not be confident

How confident are you in using digital services online? (July – October 2024)



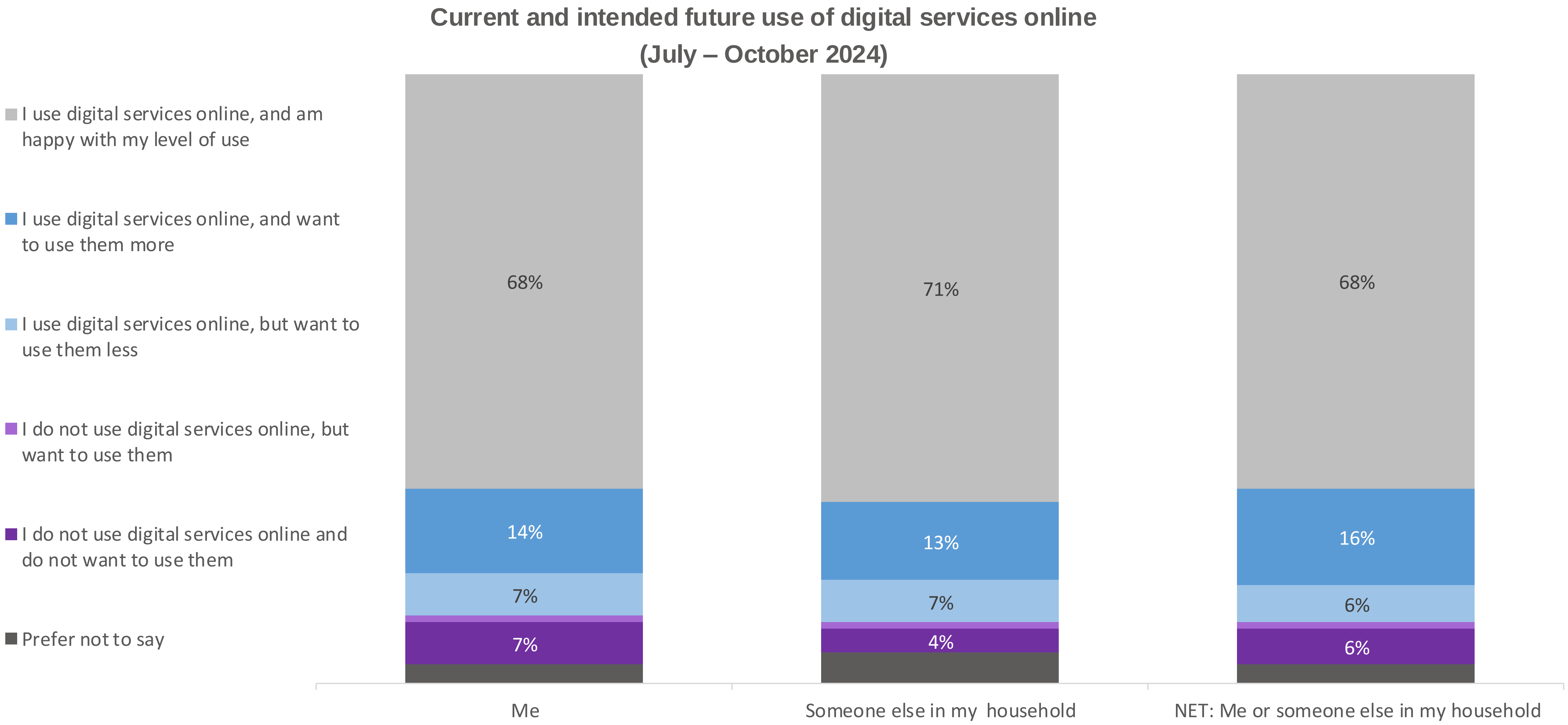
Respondents or someone in their household in the telephone sample more likely to be not very/not at all confident in using digital services online (vs. 22% GM average):

Demographics:

- Those aged 75+ (71%)
- Retired respondents (53%)
- Those aged 65+ in single person households (61%)
- Disabled respondents (40%) including those with a mobility disability (54%)
- Those with low levels of happiness (35%)

DI10. Overall, how confident is your household in using the digital services online that it needs and wants?
Unweighted base: 756, Survey 13, 250; Survey S14, 240, Survey 15, 266 (Face to face respondents)

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



DI8. How would you describe your current and future intended use of digital services online?
Unweighted base: 756; Survey 13, 250; Survey S14, 240; Survey 15, 266 (Face to face respondents)

Appendix 1

More detail on changes in survey methodology

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

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

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

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

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

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

Significance Testing and statistical difference – technical note

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

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

- The sample size included in each wave of the survey has differed (see the 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%.

Sample information

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

Key demographics (before weighting applied)

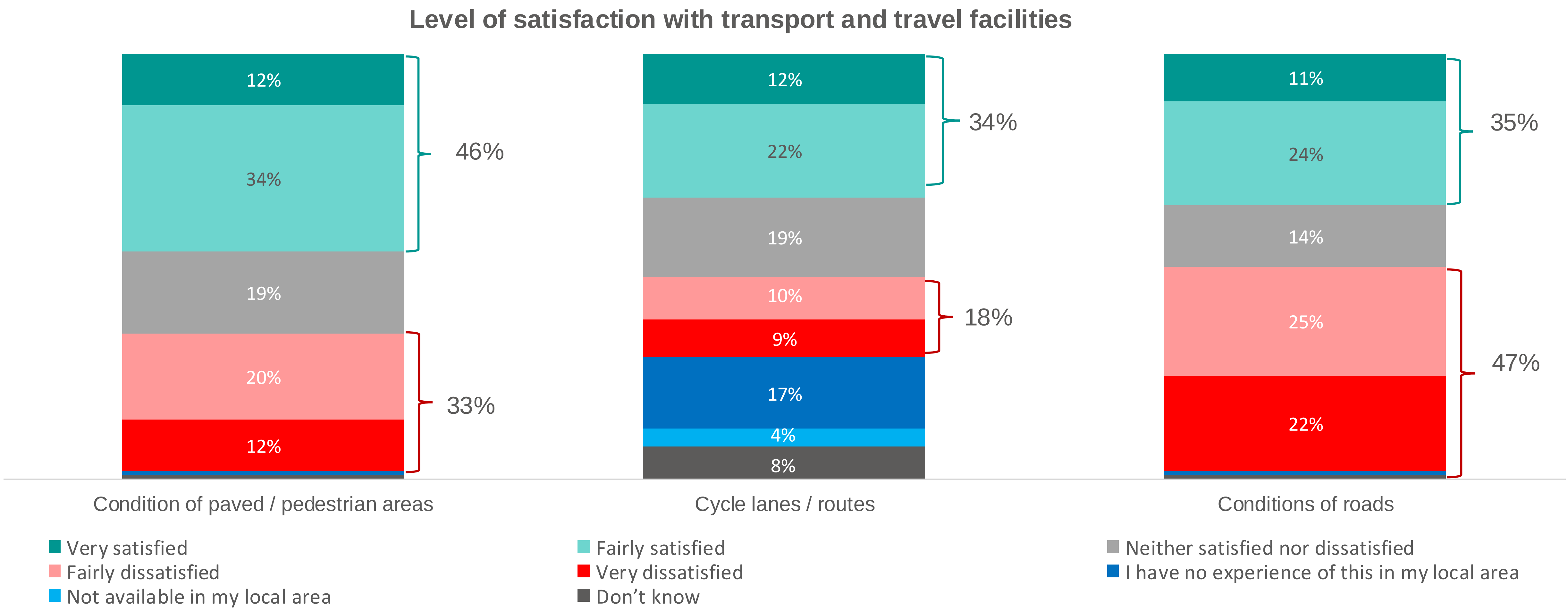
Survey	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Male	597	593	739	666	686	782	657	701	680	664	673	678	657	598	668
Female	761	843	906	970	784	964	831	877	852	840	766	843	856	866	823
16-24	113	96	123	170	111	114	133	146	123	139	150	138	139	156	141
25-44	413	421	455	503	440	483	487	457	412	460	405	531	543	451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

Appendix 2

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

LA7. Thinking about where you live, how satisfied or dissatisfied are you with your experience of the following in your local area?
Unweighted base: All respondents Survey 15, 1517

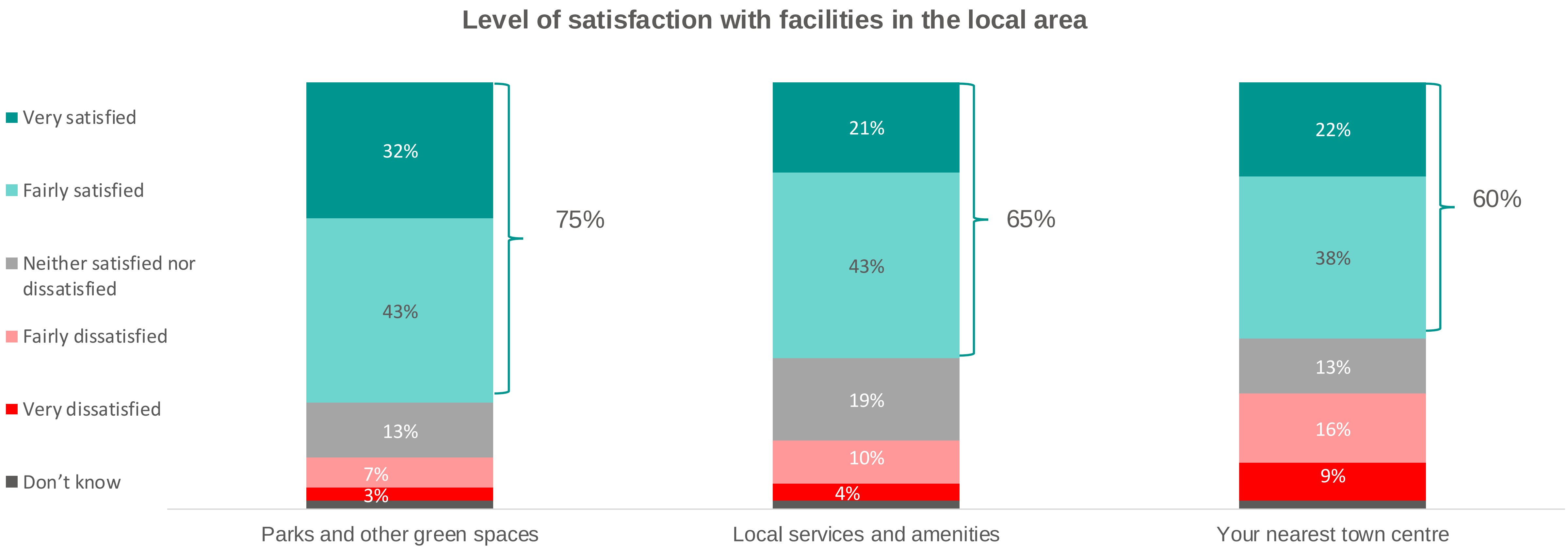
Dissatisfaction with the condition of the roads continues to make up almost half of the respondents (47%), while dissatisfaction with condition of paved / pedestrian areas makes up over a third of respondents (33%)



Figures in brackets show change since July (S13)

LA7. Thinking about where you live, how satisfied or dissatisfied are you with your experience of the following in your local area?
Unweighted base: All respondents Survey 15, 1517

Satisfaction with parks and other green spaces, local services and amenities and their nearest town centres are in line with August, with no significant variation

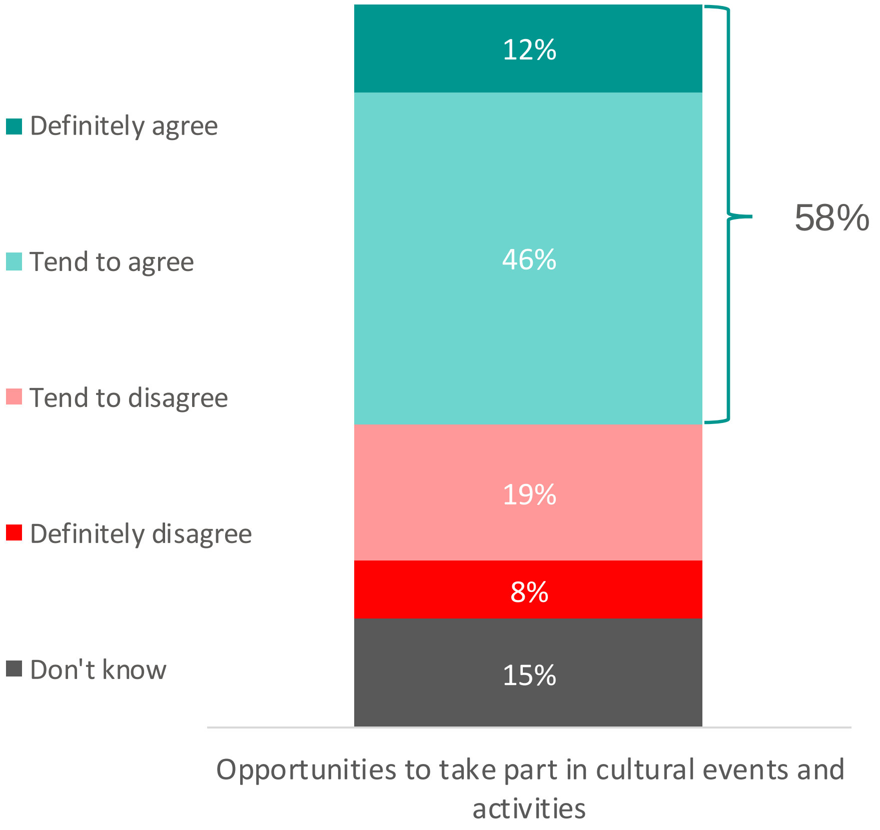


Figures in brackets show change since July (S13)

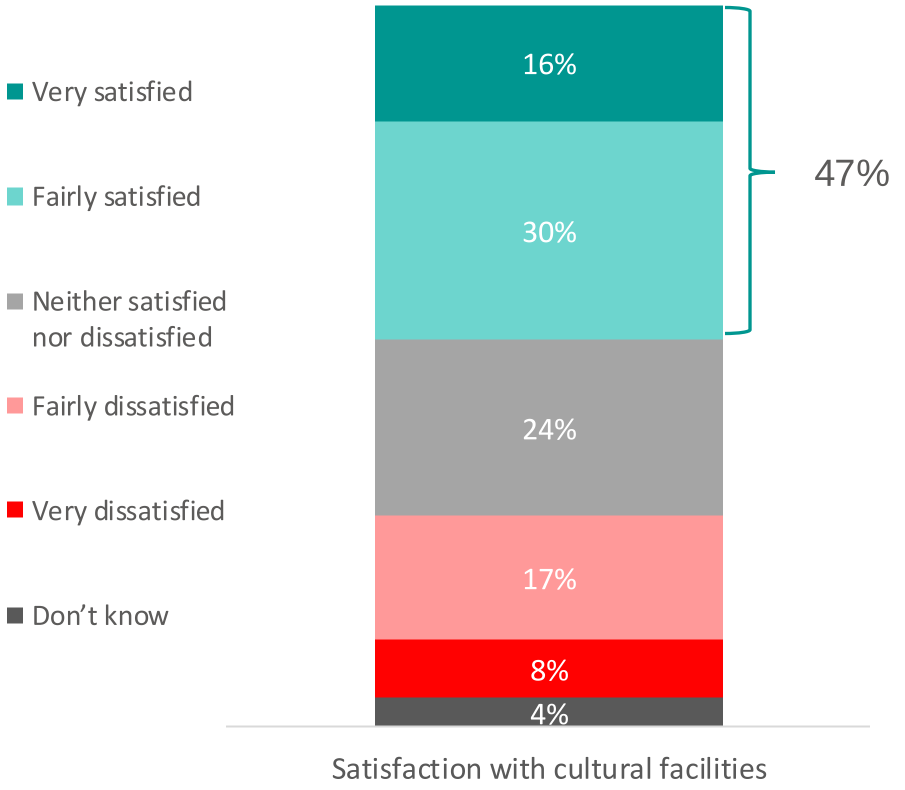
LA4. Generally, how satisfied or dissatisfied are you with…? Unweighted base: Survey 13, 1540; Survey 14, 1482 (All responses)

Almost 3 in 5 (58%) agree there are opportunities to take part in cultural events and activities in their local area. Almost half (47%) are satisfied with cultural facilities available, such as museums, theatres and events

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



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

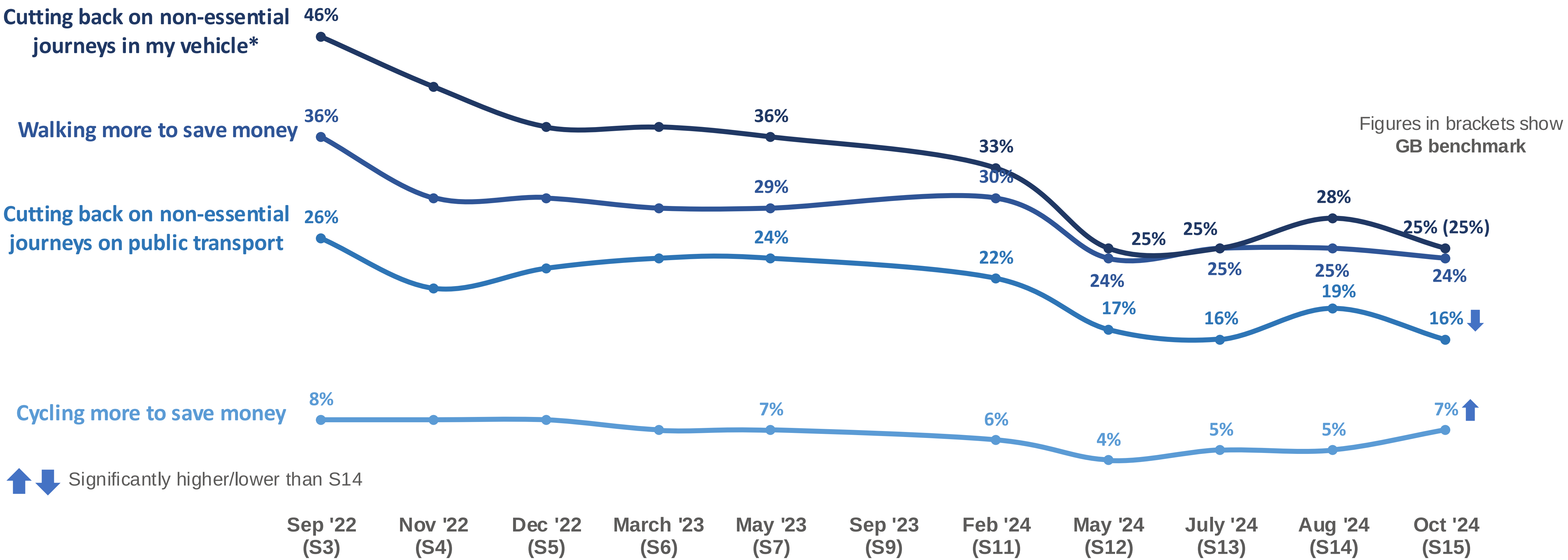


Figures in brackets show change since August (S14)

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 S15, 1517

As a result of cost-of-living increases, around 9 in 10 respondents said they continue to take actions to save money (87%). More people are cycling more to save money this wave, whilst fewer are cutting back on non-essential journeys on public transport

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

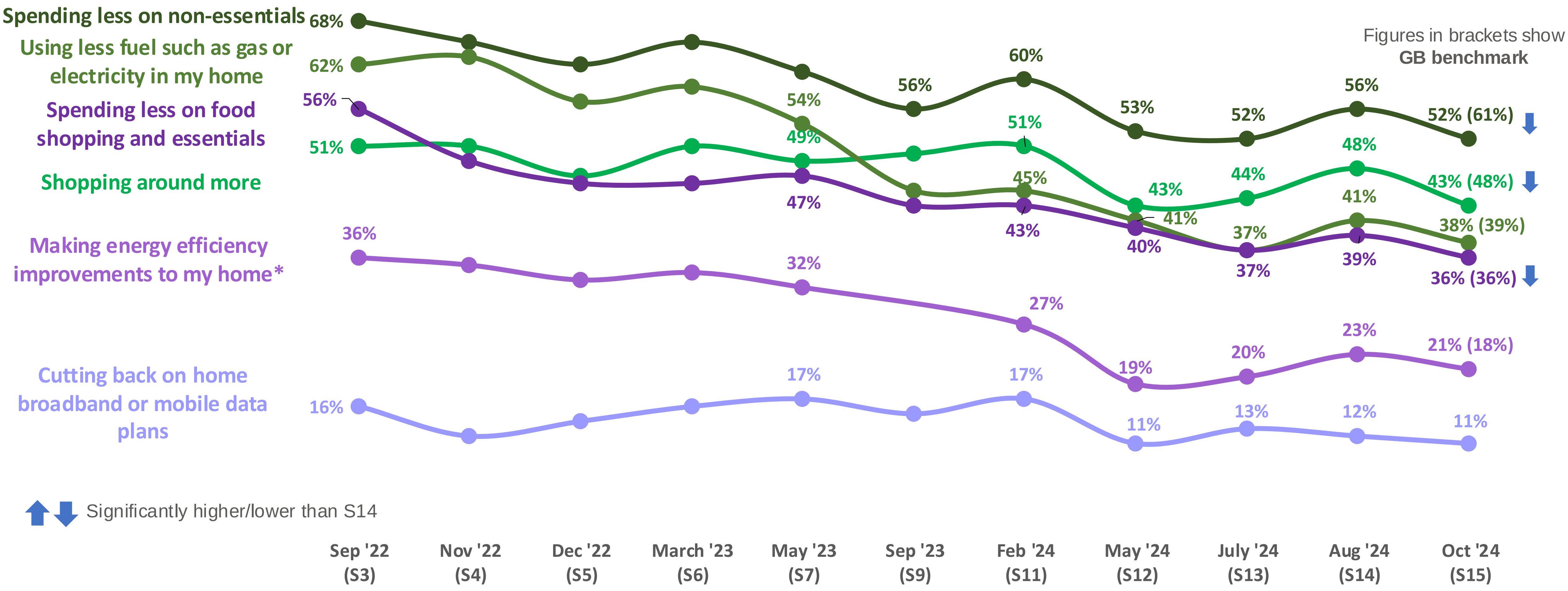


Data points shown wherever statement was included in fieldwork. Percentage figures included from May 2023 to provide a frameof reference - other specific % figures available on request

CL7. Which of these, if any, are you doing because of the increases in the cost of living? 1,517 (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.

Respondents are less likely to be spending less on non-essentials, on food shopping and essentials and shopping around more since August. All other actions have remained largely in line

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



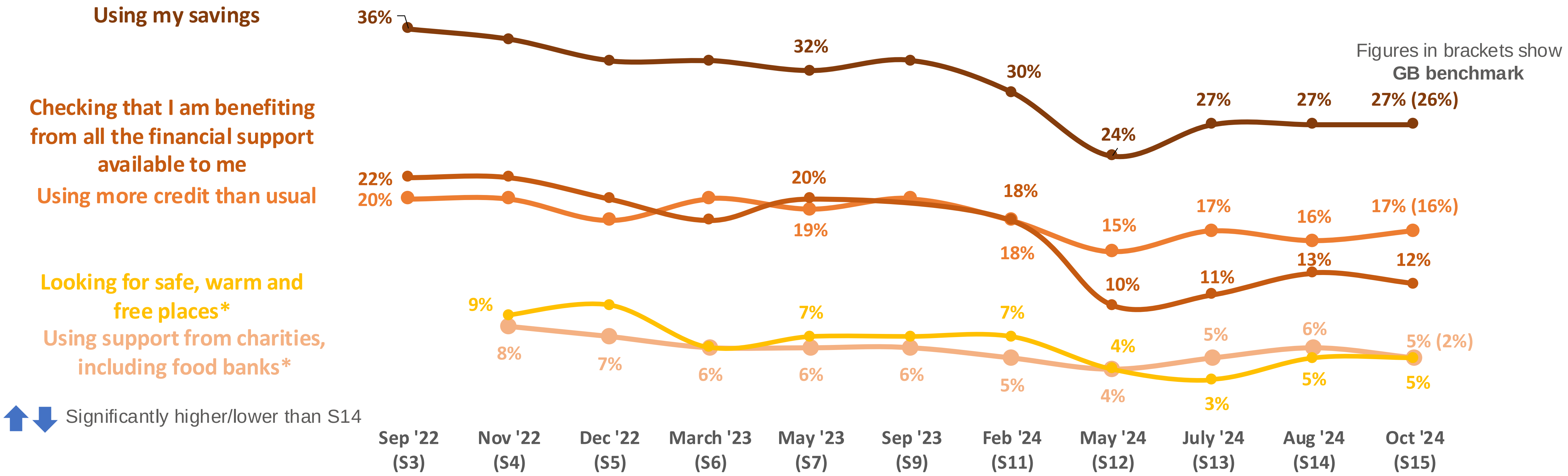
Data points shown wherever statement was included in fieldwork. Percentage figures included from May 2023 to provide a frameof reference - other specific % figures available on request

CL7. Which of these, if any, are you doing because of the increases in the cost of living? 1,517 (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.

A quarter of respondents are using their savings due to the increased cost of living – no change since August 2024. These measures are in line with previous surveys and 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 frameof reference - other specific % figures available on request

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

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

Carried out on behalf of Greater Manchester partners by

BMG

success decoded