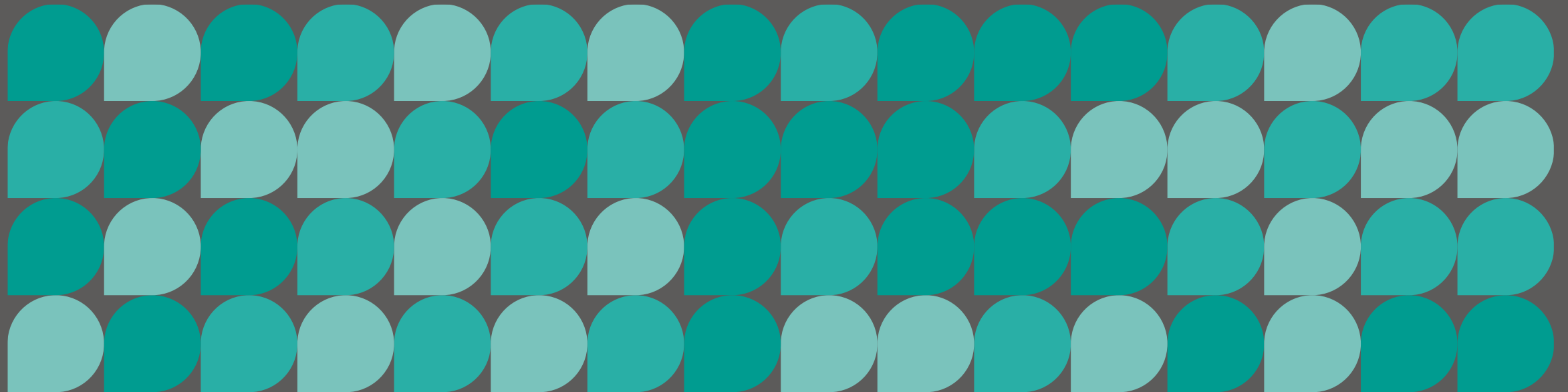


Greater Manchester Residents' Survey

Survey 4

October 2022

Fieldwork conducted 20th October – 3rd November



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Introduction and methodology

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Background

- This report presents summary findings for a survey carried out in October/November 2022, alongside those from surveys in February, April and September. This research study of Greater Manchester residents was conducted amongst a representative sample of 1636 residents from across all ten of the city region's local authority areas, between 20th October and 3rd November .
 - These surveys build upon the work of the GMCA Covid-19 Tracker conducted between December 2020 and December 2021, by also looking at the key pillars of the wider Greater Manchester Strategy and its vision for a fairer, greener and more prosperous city region. The most recent fourth survey aims to build upon the findings from Survey 1, 2 and 3, to continue informing approaches and monitoring impacts in particular for:
 - tackling food and fuel poverty
 - ensuring digital inclusion for all
 - the rising cost of living (introduced at survey 3)
 - The information within this report builds up findings on these three areas of insight, as the fourth survey in a series that will continue on a bi-monthly basis. The focus of this report is to start to look at the results of the most recent fieldwork in relation to the previous surveys in this series as well as the most recent benchmarking data from the ONS where available. The survey 4 results should be treated as indicative rather than conclusive - i.e. they are best used as indicators to open up further dialogue. Upon completion of the 2022 surveys, after survey 5 in December, it will be possible to analyse data collected across the whole year, in more depth and focusing on smaller sections of the Greater Manchester population. To help with these insights, the decision has been made to provide data for the sections listed above using the following approach:
 - tackling food and fuel poverty has been shown with the spring data (survey 1+2) merged, and then survey 3 and 4 shown separately
 - ensuring digital inclusion for all has been shown with the spring data (survey 1+2) merged, and then survey 3 and 4 also merged
 - the rising cost of living and Covid-19 sections have been shown with all four surveys separated
 - This has been done to allow more stable and robust sample sizes for sub-group analysis.
 - This research continues to provide a growing base of evidence to highlight potential trends and indicators which the Combined Authority, individual local authorities and Greater Manchester partners can begin to respond to and explore in greater detail. Overall, these regular ongoing insights are designed to help inform a range of stakeholders across Greater Manchester so that they have as much information as possible about where to target support, communications and engagement activities, and resources to improve the lives of those living within Greater Manchester.
-

Methodology and sample

Methodology

- Between February and November 2022, BMG Research undertook four surveys, all comprising of circa.1,500 residents from across Greater Manchester. This included an intended sample of 750 online panel respondents, 250 telephone respondents, and a trial of 500 online ‘river sampled’ respondents (those who responded to adverts, offers and invitations to take part in the surveys).
- The mix of using majority web-sampling with a smaller telephone element was selected so that a representative and robust sample of Greater Manchester residents could be sourced within budget.
- The telephone element of this sample was included so that those without internet access could take part in the survey. This was particularly important for the questions on digital inclusion. However, because of the constraints of the sample, please be aware that insights based on the telephone data are less robust because of the smaller base size.
- Each survey was designed to take 15 minutes on average for respondents to complete; however, due to the emotive nature of the topics covered, interviews by telephone tend to take longer than this.
- Quotas were set to ensure the sample broadly reflected the profile of respondents by gender, age, ethnicity and disability, with further consideration for wider protected and key characteristics.
- Weights have been applied to the data gathered to ensure the sample matches the population profile by age, gender and locality, and to ensure consistency between individual surveys.
- Drawing on learnings from surveys 1 and 2, BMG increased the number of invitations and revised their targeting for the ‘river sampling’ approach in survey 3 and 4. This proved effective, particularly in reaching potential respondents at off-peak times to capture the working population outside of core hours. In both survey 3 and 4, the river sample exceeded its target and accounted for 35% of the survey 4, and thereby providing a significant contribution to the size, and therefore robustness, of the overall sample of the survey.

Sample breakdown

Sample info (all fieldwork within 2022)

Survey	1	2	3	4
FW start	9 Feb	25 March	1 Sept	20 Oct
FW end	25 Feb	11 April	24 Sept	3 Nov
Total respondents	1385	1467	1677	1636
Web respondents	762 (55%)	794 (54%)	785 (47%)	791 (48%)
Phone respondents	250 (18%)	250 (17%)	235 (14%)	270 (17%)
River sampling	373 (27%)	423 (29%)	657 (39%)	575 (35%)

Key demographics (before weighting applied)

Male	597	593	739	666
Female	761	843	906	970
16-24	113	96	123	170
25-44	413	421	455	503
45-64	484	538	525	565
65+	375	412	574	398
White	1201	1314	1503	1405
Within racially minoritised communities	166	137	159	208

Report contents and guidance

Report contents & guidance

The report presents a range of tables and charts with accompanying narrative to highlight the key findings from each section of the survey among the sample from this edition of the survey (1,636), which are presented alongside findings for surveys 1 (1,385 respondents), 2 (1,465 respondents), and 3 (1,656 respondents). In the Food Security section a ‘merged’ sample (2,852 respondents) from both survey 1 and 2 is used, whilst the Digital Inclusion section also utilises a ‘merged’ telephone sample, which totalled 505 respondents for surveys 3 and 4.

Where relevant, demographic and other population characteristics are also reported. These differences are only highlighted where they are significantly different statistically (at the 95% level of confidence) compared with the ‘total’ figures (i.e. the Greater Manchester average). The merged samples have been used in order to show a more robust representation of the metrics regarding food security and digital inclusion.

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

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

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

Finally, and with regards to a key point of language, it should be noted that this report uses the term ‘from within racially minoritised’ to refer to people and communities experiencing racial inequality (the term recognises that individuals have been minoritised through social processes rather than just existing as distinct minorities, 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 survey findings for specific ethnic groups, and recognise that this does not allow full and detailed insight to be gained into the experiences of minoritised ethnic groups. However, as more surveys are conducted and a larger overall sample size is available this more detailed breakdown will become available.

Cost of Living

Key findings

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Overview

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Cost of Living – key findings (1/2)

Survey 3 conducted in September 2022 introduced (for the first time) a major focus on the current cost of living crisis. This has remained the case in survey 4 so that, where applicable, changes can be tracked over time. Questions also mirror those that have been asked in Great Britain (GB) by the Office for National Statistics so that benchmarking can be undertaken.

OVERALL IMPACTS AND CONCERNS ABOUT COST OF LIVING

- The impacts of the cost of living crisis are reaching far beyond ‘disadvantaged’ parts of our population: 4 in 5 (82%) Greater Manchester (GM) respondents say their cost of living has increased over the past month and a similar proportion (80%) are worried about the rising costs of living. GM results are broadly in line with GB, though more GM residents report being “very worried” (over a third (34%) compared to 28% of GB respondents). This is a drop since September (when 39% of GM residents were “very worried”, compared to 32% in Great Britain) but the results continue to show that concern is widespread.
- Some parts of the population are more likely to be worried about their costs of living than others. Whilst 81% of the population as a whole report being worried, this figure is higher among parents of children under 5 (89%), disabled respondents (86%) and those aged 25-34 (88%).

FINANCIAL SITUATION AND BORROWING

- A third (33%) of GM households have borrowed more money or used more credit in the past month, compared with this time last year. This remains substantially higher than the GB figure of 20%, but does represent a small decline from 35% of GM respondents in September. The most common ways of borrowing are credit cards (51%), loans from friends and family (44%), or bank overdrafts (33%).
- Almost half of GM households would be unable to pay an unexpected but necessary expense of £850, suggesting many could now be substantially impacted, for example, by rapidly rising interest rates - 41% of GM households would not be able to afford to do so (compared to 43% in September), compared to 30% of GB households.
- A third (34%) of GM homeowners are already finding it difficult to pay their mortgage, whilst almost half (47%) of renters are having difficulties with rent payments.

Cost of Living – key findings (2/2)

ENERGY COSTS

- With fieldwork beginning shortly after the implementation of the Energy Price Guarantee, energy costs remain one of the most significant aspects of hardship. Over half of residents say they are having difficulty being able to afford their energy costs (57%) - GM's results are significantly higher than the GB average (43%). The GM figure is even higher for disabled people and parents of children under 5 (72% in both instances).
- Of those with a pre-payment meter – which was nearly a quarter of all respondents to the survey - almost half (49%) say keeping their meter topped up and connected is a daily concern.
- Almost half (46%) of respondents with an energy supplier are satisfied with the messages sent by their energy supplier to help reassure customers. Less than 1 in 3 (28%) are satisfied with their energy supplier offering to pause or reduce debt repayments if customers are having financial difficulties.
- Over a third (35%) of respondents have contacted someone for support with paying their energy bills. 13% of GM respondents have contacted their energy supplier, with over half (57%) satisfied with the support they received.

MORTGAGE AND RENT COSTS

- Over 1 in 10 (15%) of GM residents with a mortgage say they're behind on mortgage payments, while almost 1 in 4 (23%) of renters say they are behind on rent payments.
- A third of home owners in Greater Manchester who pay mortgage costs say it is difficult to afford these costs, whilst almost half of renters say it is difficult to afford their rent. This is a higher level of reported difficulty than currently seen in GB surveys: 34% of GM mortgage holders report it is 'very' or 'somewhat' difficult to afford their mortgage payments (24% in Great Britain); whilst 47% of GM renters report it is 'very' or 'somewhat' difficult to afford their rental payments (43% GB).

WORK SITUATION

- As a result of rising costs of living, respondents in Greater Manchester are more likely than those across Great Britain to be working more hours than usual (31% vs 18%), looking for another job or a promotion (26% vs 20%), and working more than one job (13% vs 4%)

WELLBEING

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

Approach and sample – Cost of living

Approach

This report presents summary findings for survey 4 of the 2022 research study of a representative sample of the Greater Manchester population. The information within this section provides the findings on the cost of living questions. This survey is the second time questions on cost of living have been asked, and as such, we have tracked data where possible with survey 3. The ambition is to have more tracked data in future surveys by repeating these questions at least once more in December. This means that the sample will become larger and more robust and greater analysis of sub-groups will be possible.

Please note that some questions have had their wording or answers options adjusted and comparisons with survey 3 findings may therefore not always be possible. This has been done to reflect changes to the ONS' Opinions and Lifestyle Survey, in order to be able to compare and benchmark data.

Whilst some of these questions have been asked in Survey 3, these results should be treated as indicative rather than conclusive at this stage – they are used best as indicators to open up further dialogue.

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

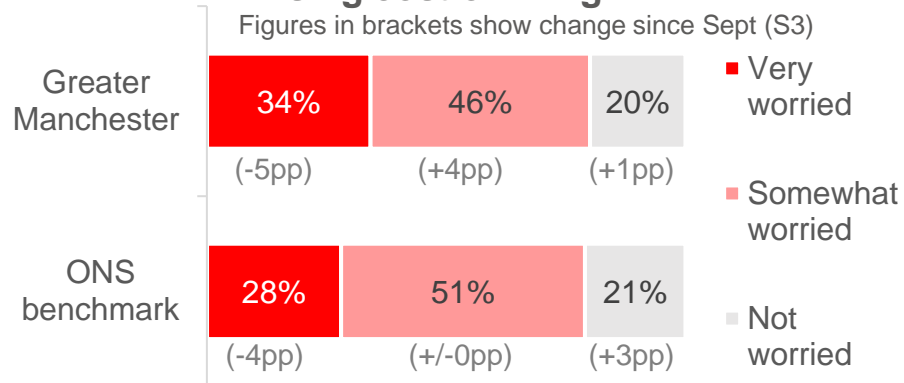
Where possible, data in the Cost of Living section has been compared against the latest survey results from the ONS' Opinions and Lifestyle Survey in Great Britain. Fieldwork for this survey in Great Britain is completed fortnightly and so comparisons of the GM survey (fieldwork 20 October – 3 November) have been compared to the ONS results from fieldwork conducted between 12 – 23 October 2022.

Sample breakdown

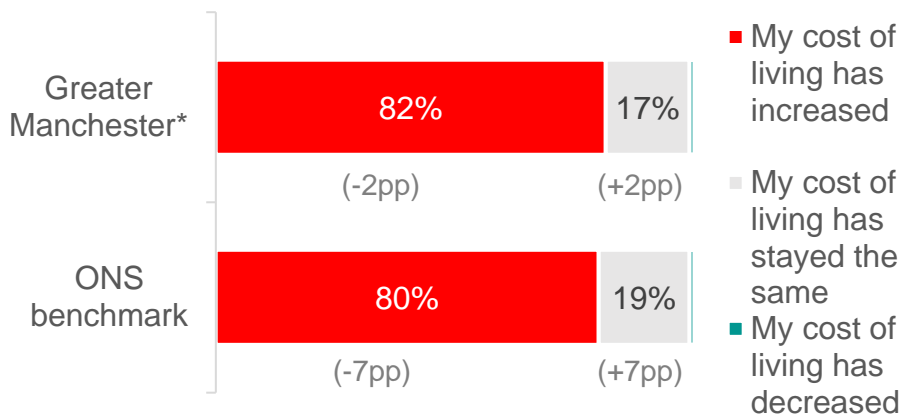
	September (S3)	October (S4)
Fieldwork start	1 st September	20 th October
Fieldwork end	21 st September	3 rd November
Total respondents	1677	1636

Summary: Cost of living – worry levels and impacts

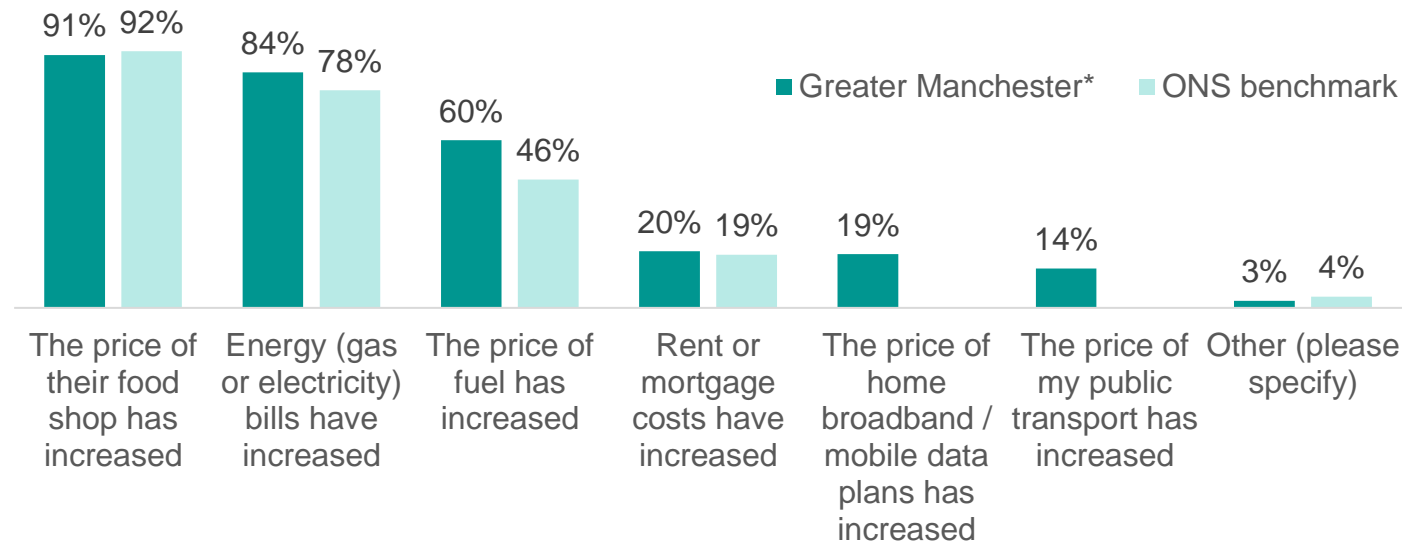
Respondents in Greater Manchester are more likely than those across Great Britain to be very worried about the rising cost of living



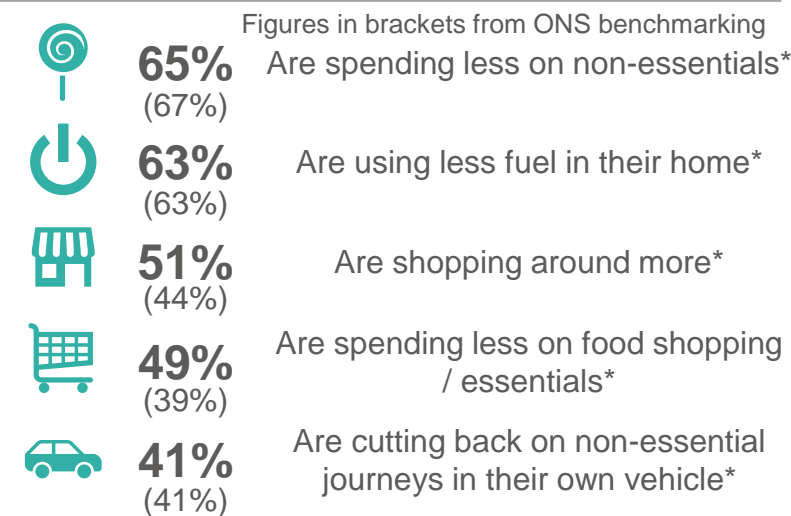
...and 4 in 5 say their cost of living has increased over the past month



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



33%
vs. 20% in ONS benchmarking
say they have had to borrow more money or use more credit than usual in the last month, compared to a year ago

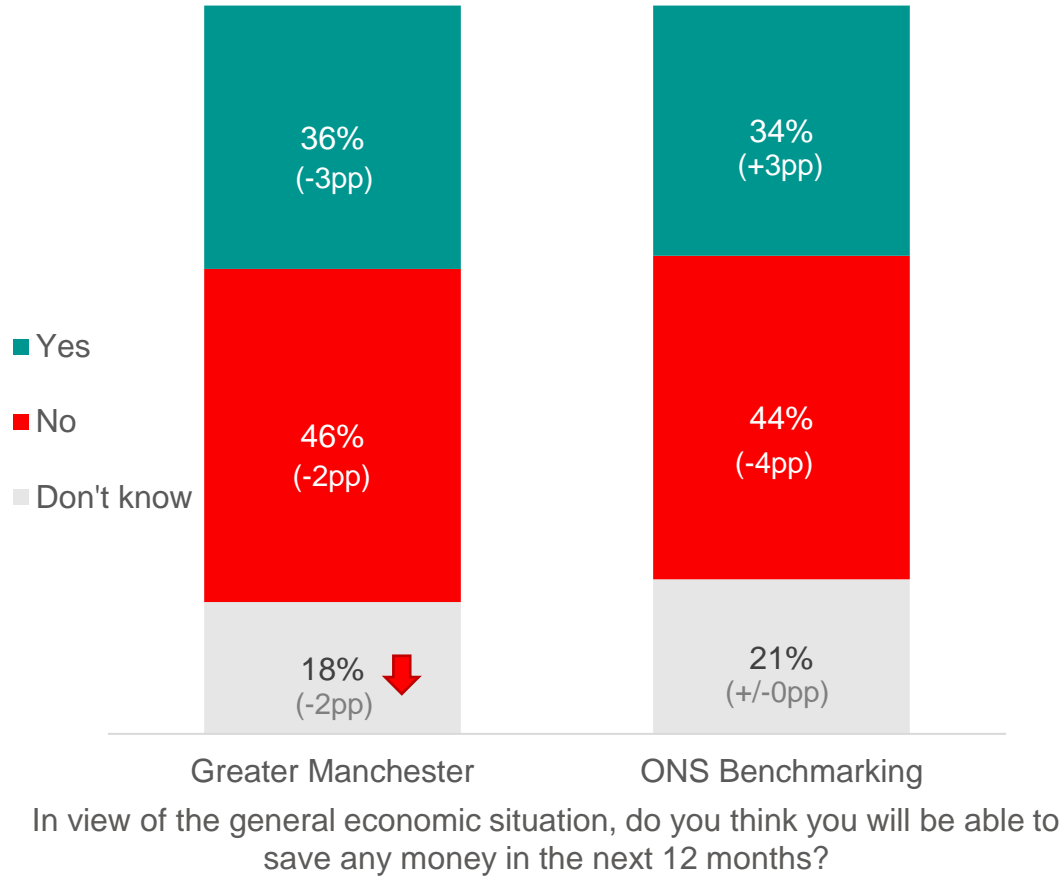


All data is from Survey 4 only. ONS data was published on 23rd October 2022. Unweighted base: 1,636 (All respondents)

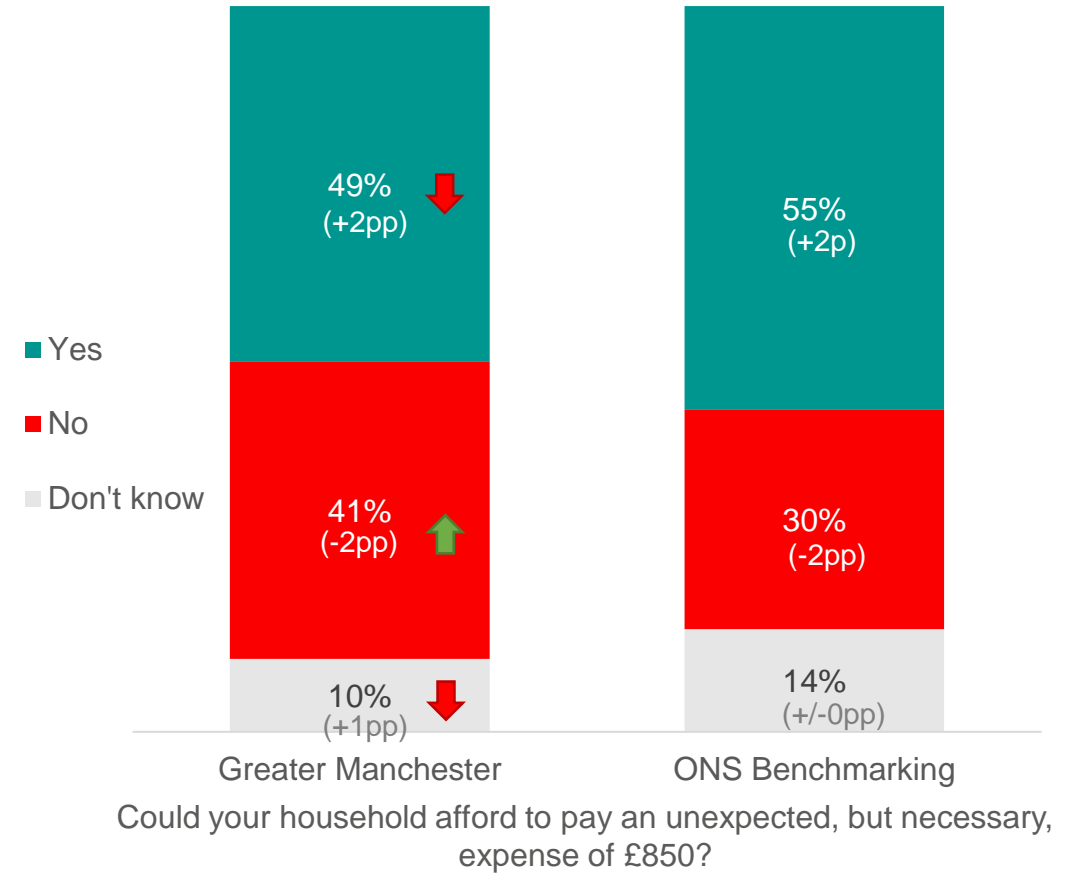
*ONS question wording has slightly changed between GM Residents' Surveys 3 and 4. In order to remain comparable with the ONS data, GM wording has also been updated

Summary: Financial security – ability to save money and meet unexpected expenses

Almost half of respondents in Greater Manchester do not think they **will be able to save money** in the next 12 months



Two in five respondents in Greater Manchester say they **would not be able to afford** an unexpected, but necessary, expense of £850, significantly higher than ONS benchmarking



↑ ↓ Significantly higher/lower than the ONS Benchmark

Summary: Financial security – energy and housing

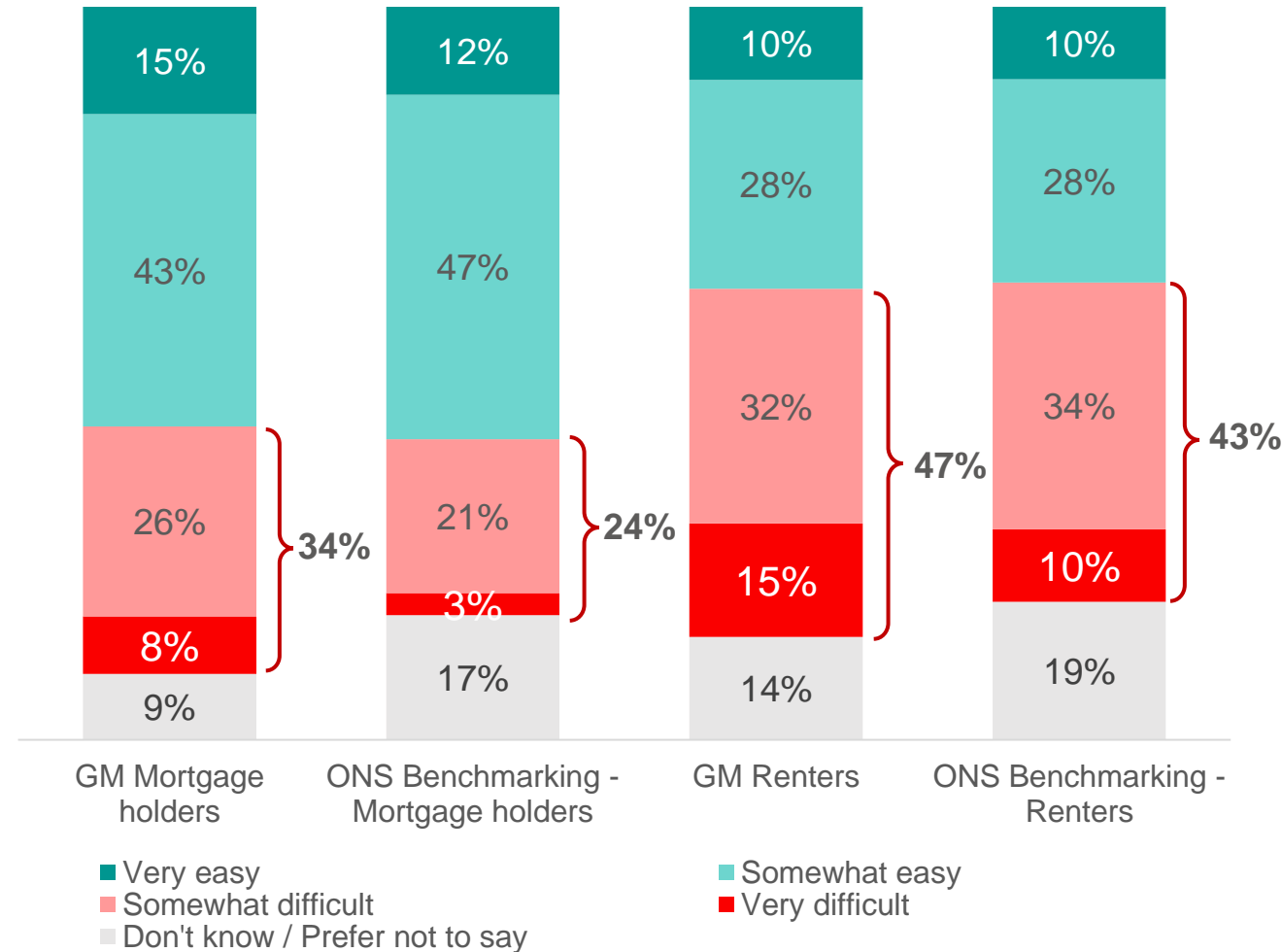
More than half of respondents say it is **difficult** to afford their energy costs*



Figures in brackets show change since Sept (S3)

- Very easy
- Somewhat easy
- Somewhat difficult
- Very difficult
- Don't know / Prefer not to say

A third of home owners in Greater Manchester who pay mortgage costs say it is **difficult** to afford these costs, whilst almost half of renters say it is **difficult** to afford their rent



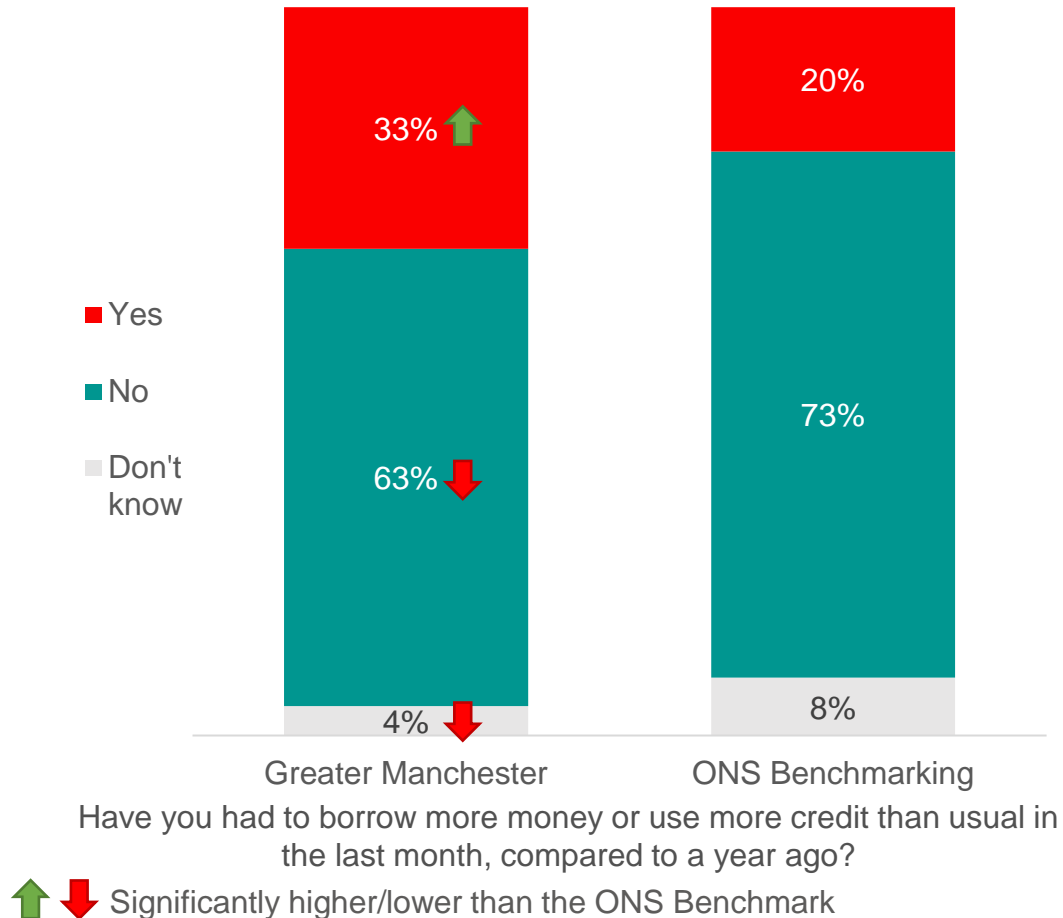
- Very easy
- Somewhat easy
- Somewhat difficult
- Very difficult
- Don't know / Prefer not to say

All data is from Survey 4 only. ONS data was published on 23rd October 2022. Unweighted base: 1,636 (All respondents); 485 (Home owners who pay mortgage); 493 (Renters)

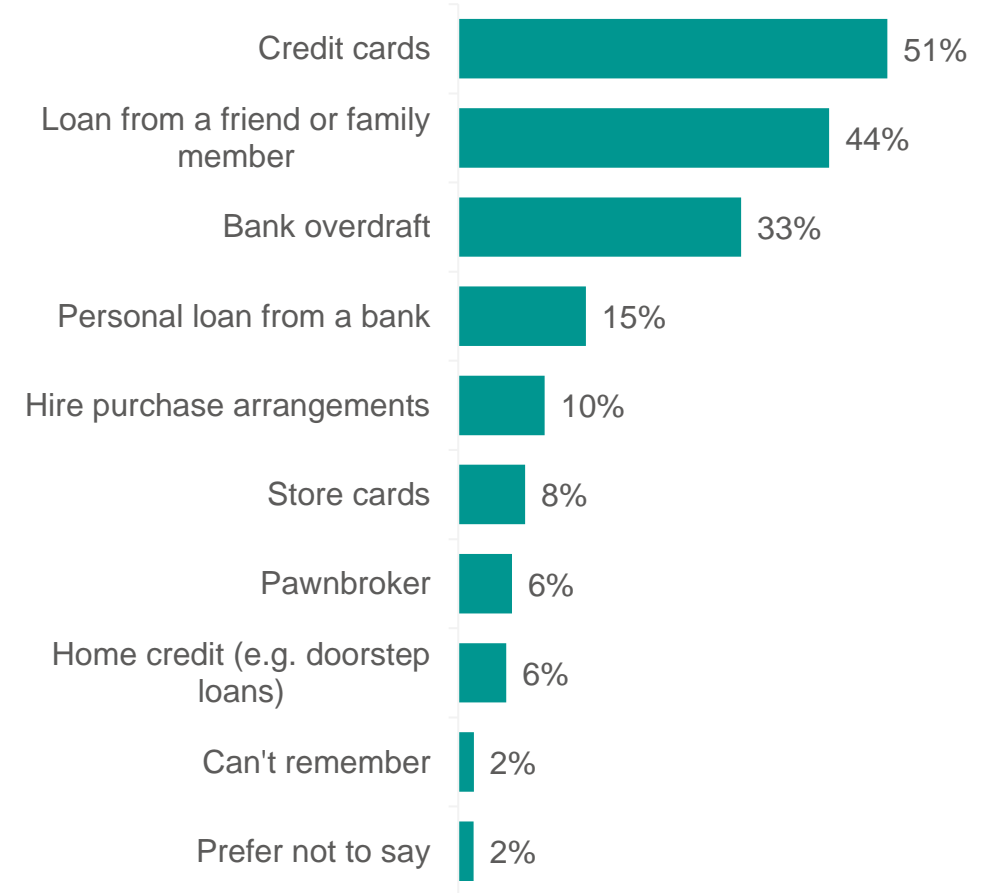
*GM Residents' Tracker question wording has slightly changed between S3 and S4

Summary: Financial security – borrowing money and credit

A third of Greater Manchester respondents have had to **borrow more money** in the past month than they did at the same time last year

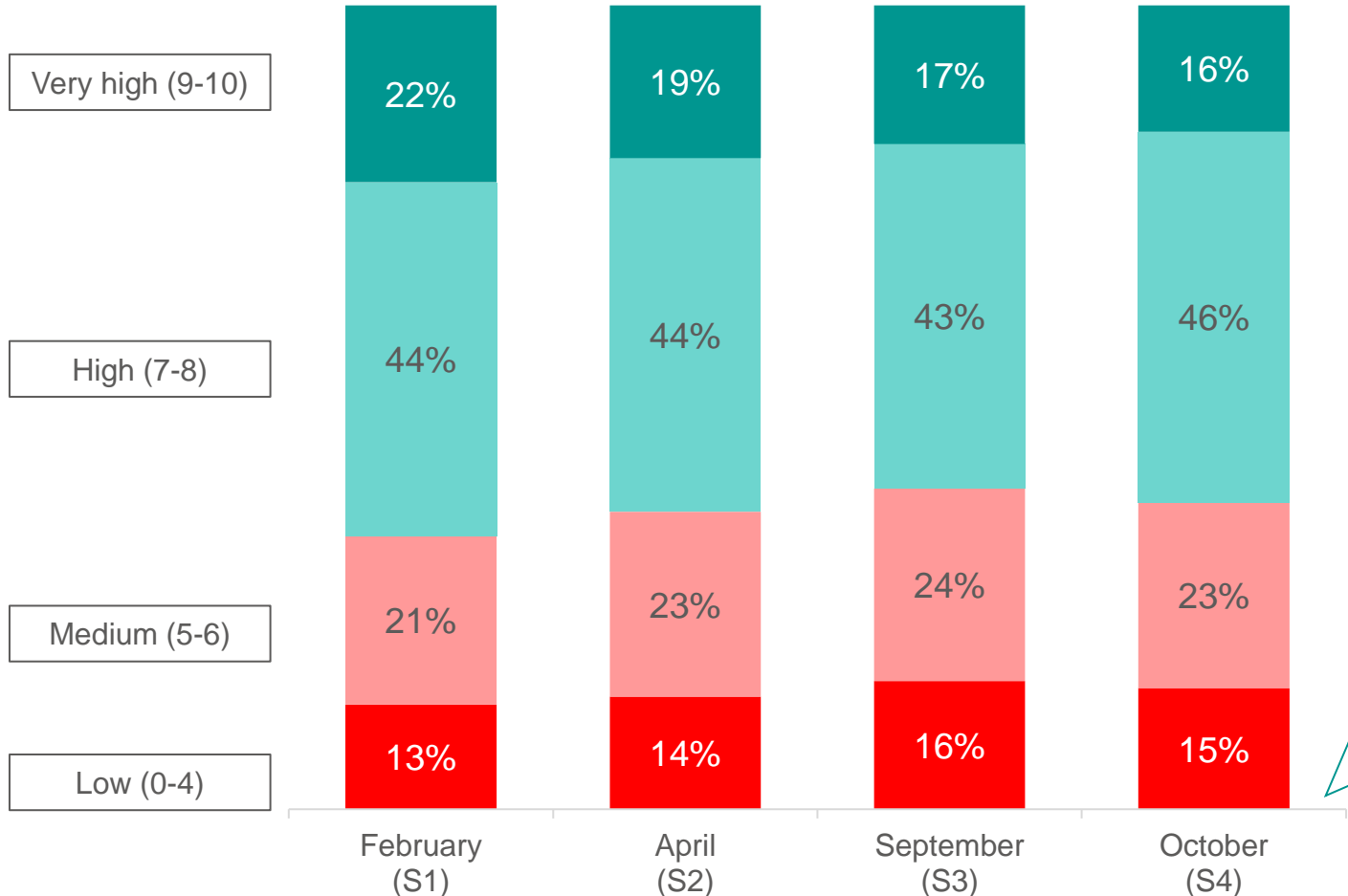


We asked respondents to indicate which of the following places they have borrowed money or used credit from. Respondents could tick all options that applied to them. Of those who have borrowed money or used credit, half have **used credit cards** (51%), over two fifths have **loaned from friends and family** (44%), and a third have utilised their **bank overdraft** (33%)



The proportion of respondents who say they have very high **life satisfaction** has remained stable since September (16% vs. 17%). Those with lower life satisfaction continue to include disabled respondents and those in financially precarious situations

How satisfied are you with your life nowadays?



% with 'low' life satisfaction higher compared to GM average (15%) among (survey 4)*:

Demographics

- Disabled respondents (29%) including those who have mental ill health (41%), or a mobility disability (29%); or other disability (35%)
- 45-54-year-olds (25%)

Individual and/or family circumstance

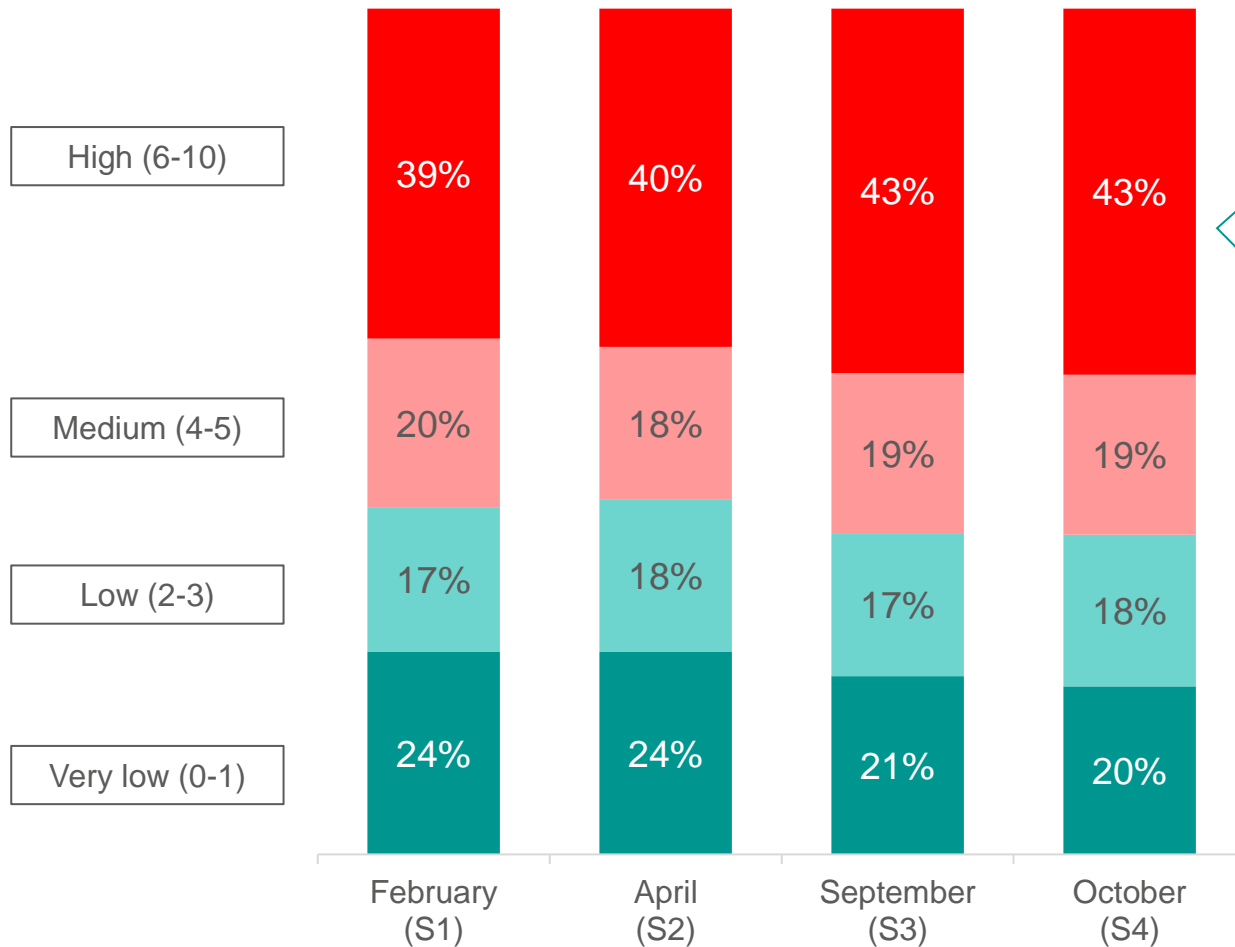
- Those not in work due to ill health or disability (52%)
- Those who have not eaten the whole day for lack of money (35%)
- Those who have not cut the size or skipped a meal (31%) or have had someone else in their household do so (28%)
- Those earning up to £15,599 (27%)
- Those who find it difficult to afford rent or mortgage (27%)
- Those who have had a pre-payment meter for more than a year (26%)
- Self-employed people (25%)
- Those who are renting (25%)
- Those who have had to borrow money or use more credit in the last month (25%)

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

*Groups with a base size below 50 are not included

Over two fifths (43%) of respondents say they **feel highly anxious**, which is a similar proportion to September, but a higher figure than in the spring. Disabled respondents (including those with mental ill health) and those whose first language is not English are more likely to feel anxious

How anxious did you feel yesterday?



% who felt 'highly anxious' higher compared to GM average (43%) among (survey 4)*:

Demographics:

- Disabled respondents (58%), including those with mental ill health (74%), a mobility disability (52%); another type of disability (55%) Parents of children under 5 (61%)
- Bisexual respondents (60%)
- Those with caring responsibilities (56%)
- 25-34-year-olds (55%)

Individual and/or family circumstance

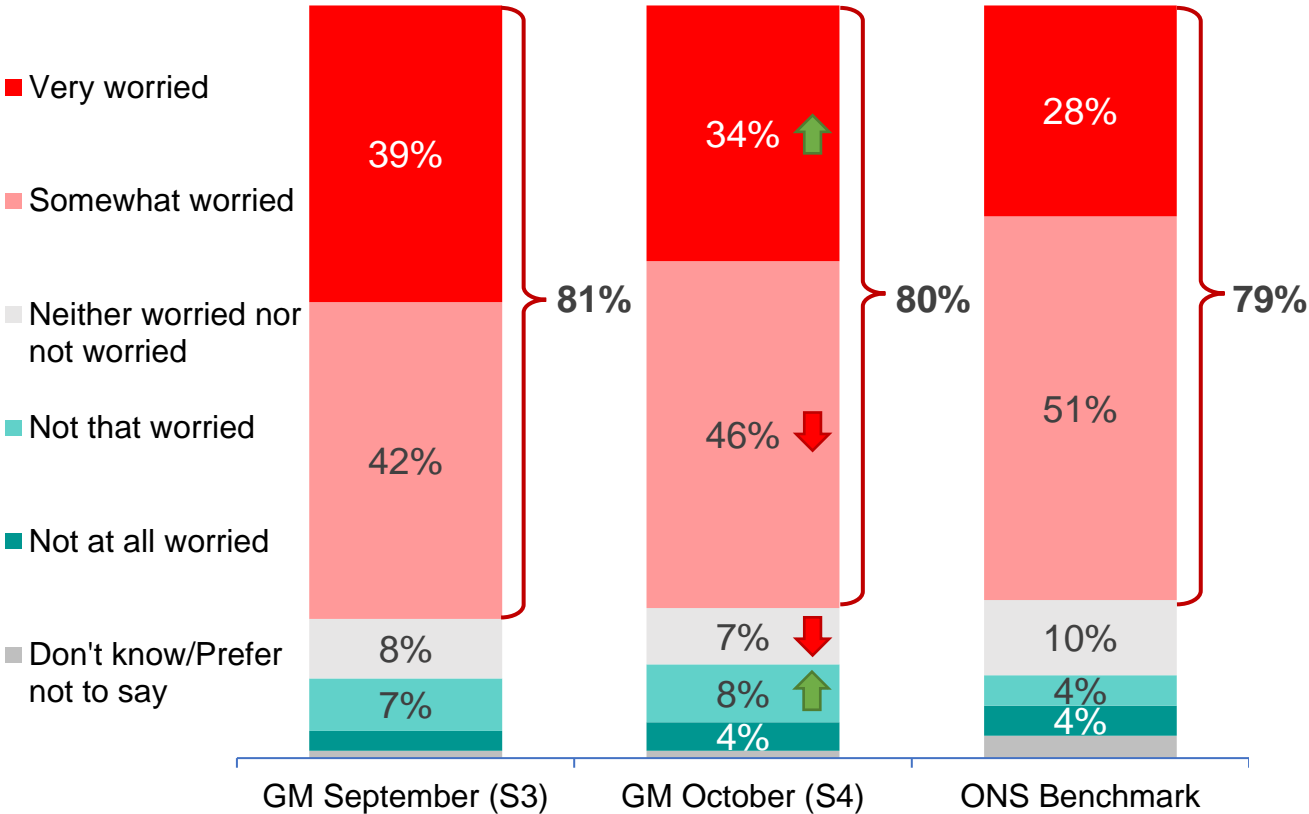
- Those who have had someone in their household not eaten all day for lack of money (75%); or have done so themselves (67%)
- Those who have someone in their household who have cut the size of or skipped a meal (68%); or have done so themselves (63%)
- Those who are not in work due to ill health or disability (64%)
- Homemakers (60%)
- Those with a pre-payment meter in their home (59%)
- Those who are worried about Covid-19 (58%)
- Those who have had to borrow more or use more credit in the past month (57%)
- Those who are entitled to free school meals (56%)
- Those who find it difficult to afford rent or mortgage (55%)

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

*Groups with a base size below 50 are not included

4 in 5 (80%) respondents in Greater Manchester are **worried about the rising costs of living**, with a third (34%) very worried – the latter being significantly higher than the ONS benchmark – though this group has dropped significantly since September (39%)

Worried about rising costs of living



↑ ↓ Significantly higher/lower than the ONS Benchmark

% who are significantly more likely to feel very / somewhat worried compared to GM average (80%)*

Demographics

- Parents of children in college (93%)
- Disabled respondents (88%); those with mental ill health (90%); mobility disability (88%)
- Parents of children under 5 (89%)
- 25-34-year-olds (88%)

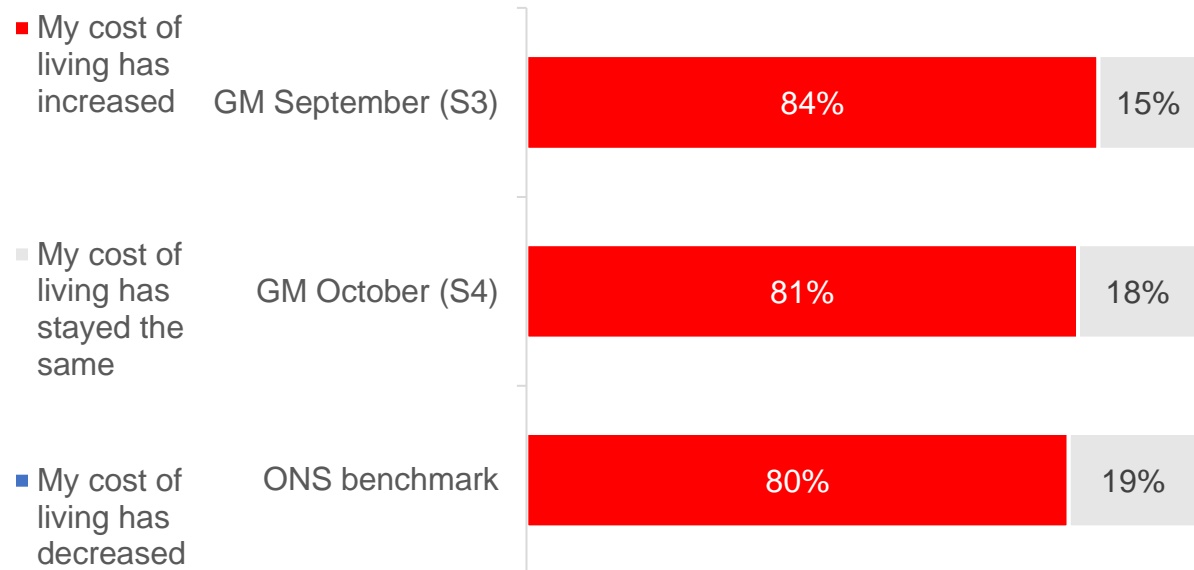
Individual and/or family circumstance

- Homemakers (96%)
- Those who have cut the size of or skipped a meal (94%)
- Those who have had to borrow more or use more credit in the last 12 months (93%)
- Those who find it difficult to afford rent or mortgage (93%)
- Those considering switching to a pre-payment meter (93%)
- Those who find it difficult to afford energy costs (92%)
- Those unable to save money in the next 12 months (92%)
- Those earning below the Real Living Wage (91%)
- Those worried about Covid-19 (90%)
- Those who have not eaten all day for lack of money (87%)
- Those whose children are entitled to free school meals (87%)

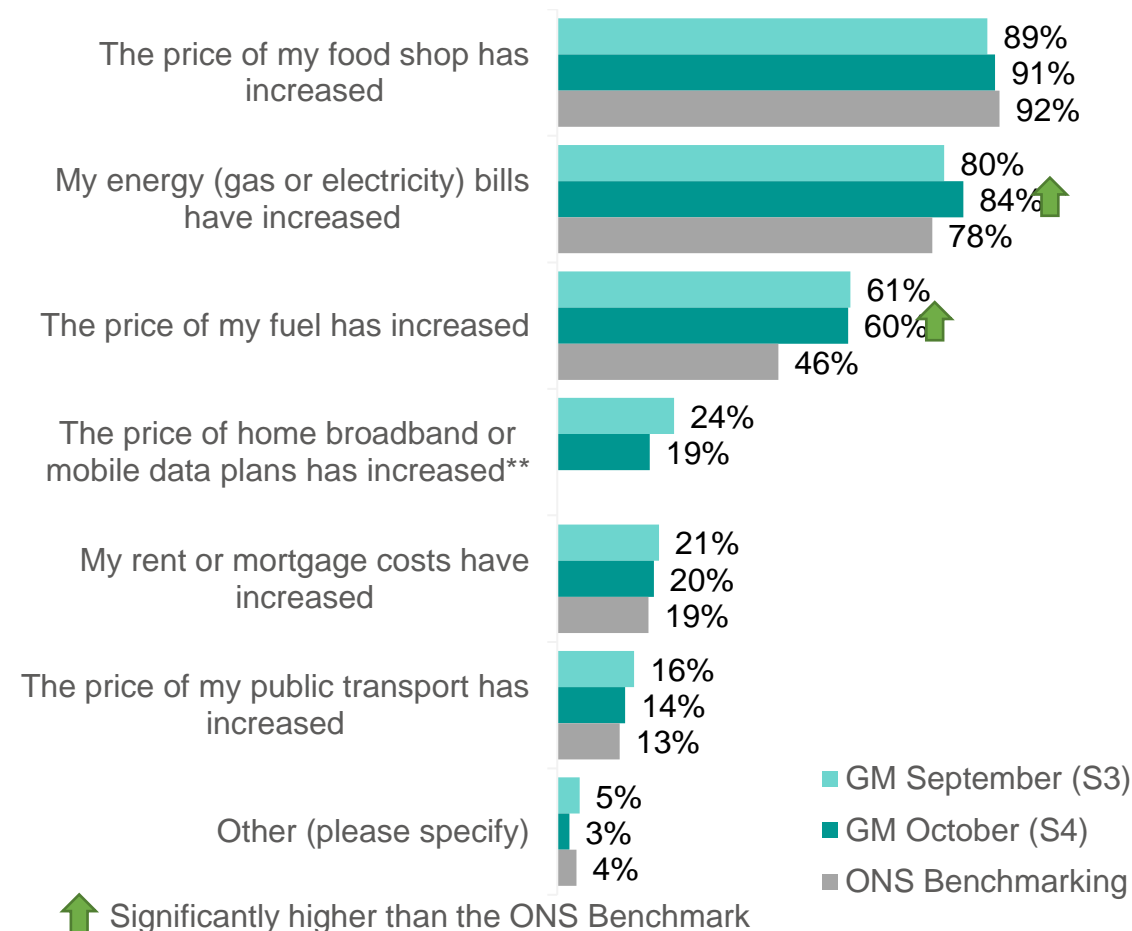
*Groups with a base size below 50 are not included

4 in 5 (81%) respondents say their **cost of living has increased in the last month, the same as the ONS Great Britain average (80%). Greater Manchester respondents are more likely than the Great Britain average to say that increases in energy bills (84% vs. 78%) and fuel (60% vs. 46%) have contributed to a rising cost of living**

Change in cost of living over the last month*



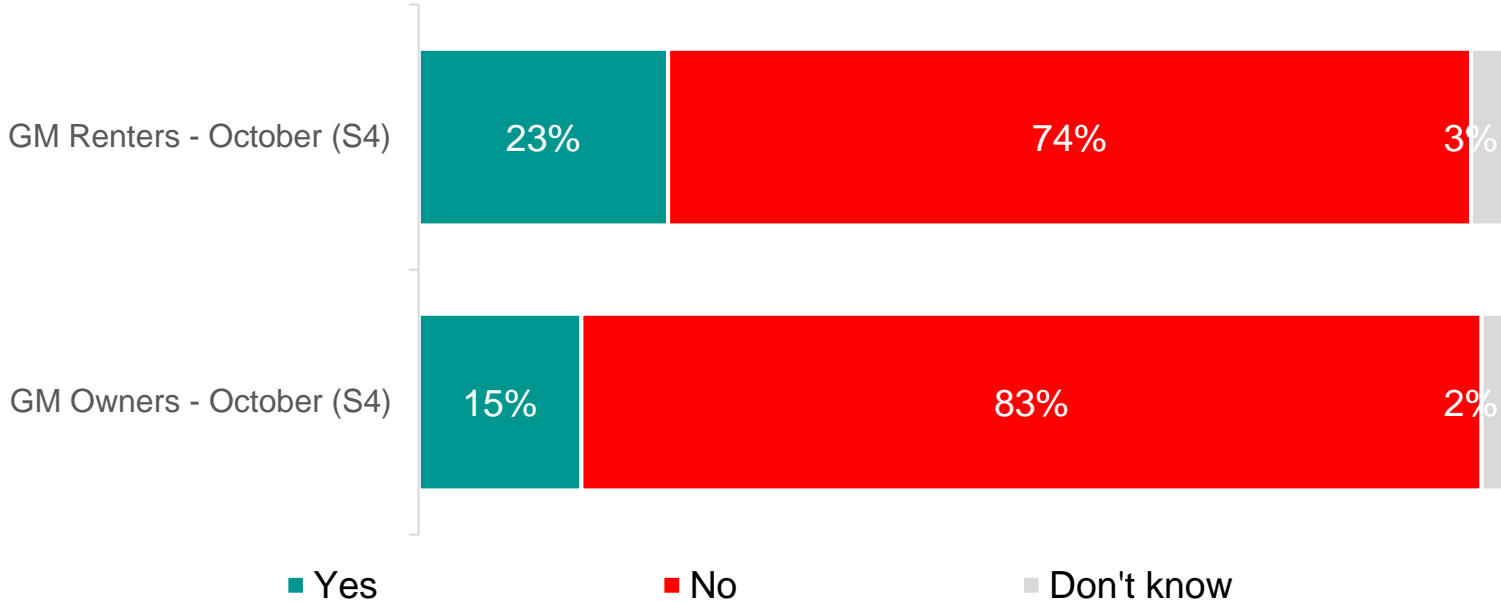
Reasons for increase in cost of living* (n=1,365)



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? Unweighted base: S3, 1677; S4, 1636 (All respondents); S3, 1432; S4, 1365 (All whose cost of living has increased) *ONS question wording has slightly changed between GM Residents' Surveys 3 and 4. In order to remain comparable with the ONS data, GM wording has also been updated. **Not asked in the ONS benchmarking

Nearly 1 in 4 (23%) of GM respondents say they're behind on their rent, whilst over 1 in 10 (15%) are behind on their mortgage payments

Are you behind on rent or mortgage payments?
Those whose rent/mortgage have increased*



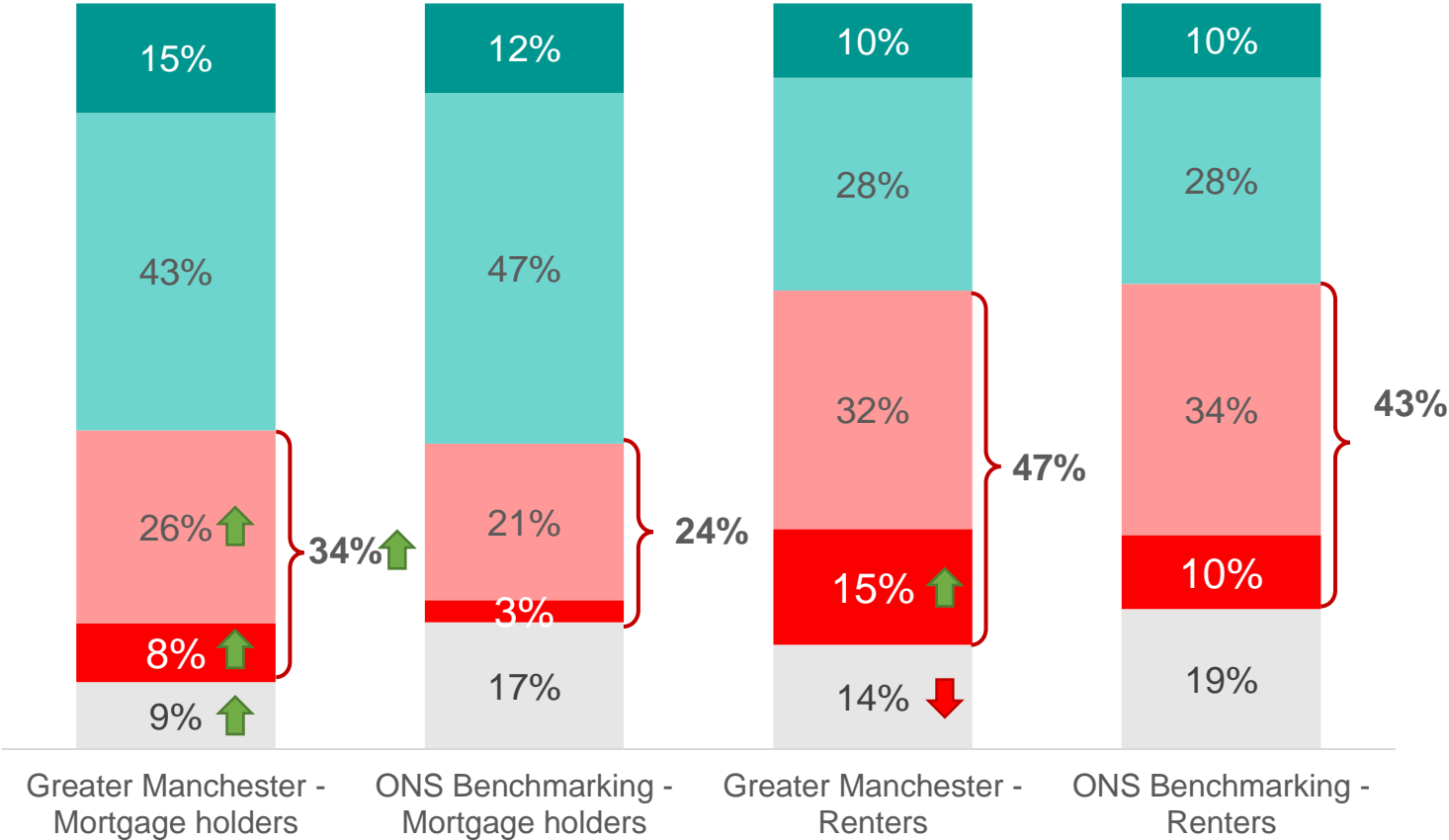
- % who are significantly more likely to be behind on their rent or mortgage payments compared to GM average (18%)**
- Those who have not eaten all day for lack of money (41%)
 - Those who have a pre-payment meter (39%)
 - Those whose are entitled to free school meals (38%)
 - Those with caring responsibilities (36%)
 - Those who have contacted someone for help with paying their energy bills (31%)
 - 16-24-year-olds (29%)

↑↓ Significantly higher/lower than the ONS Benchmark

CL6A. Are you behind on your rent or mortgage payments?
Unweighted base: 245 (All whose rent / mortgage have increased)

GM residents are more likely than the GB average to find it difficult to afford their mortgage payments (34% vs. 24%) or their rent (47% vs. 43%)

Ease of affording rent or mortgage payments

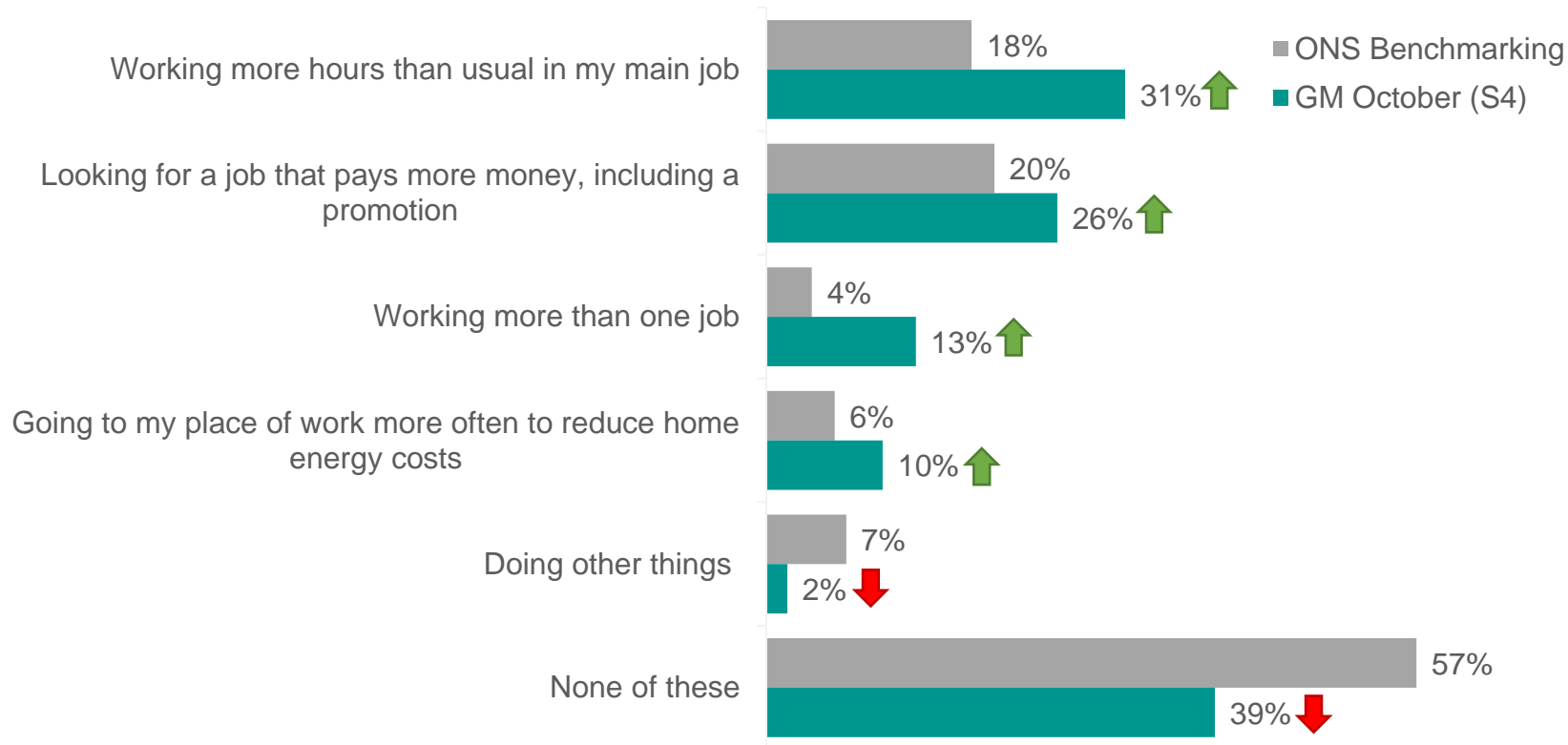


■ Very easy
 ■ Somewhat easy
 ■ Somewhat difficult
 ■ Very difficult
 ■ Don't know / Prefer not to say
↑ ↓ Significantly higher/lower than the ONS Benchmark

CL9. How easy or difficult is it to afford your...
 Unweighted base: 459 (Mortgage holders); Renters (438)

As a result of rising costs of living, respondents in Greater Manchester are more likely than those across Great Britain to be **working more hours than usual** (31% vs 18%), **looking for another job or a promotion** (26% vs 20%), and **working more than one job** (13% vs 4%)

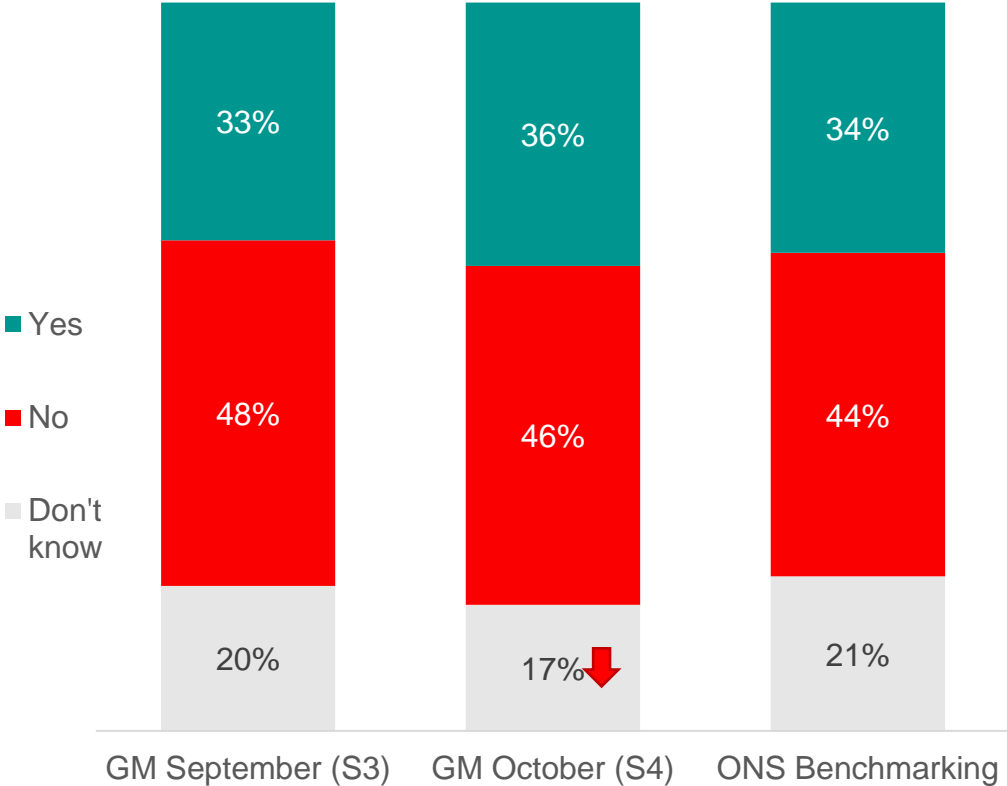
Which of the following are you doing at work as a result of the rising costs of living?



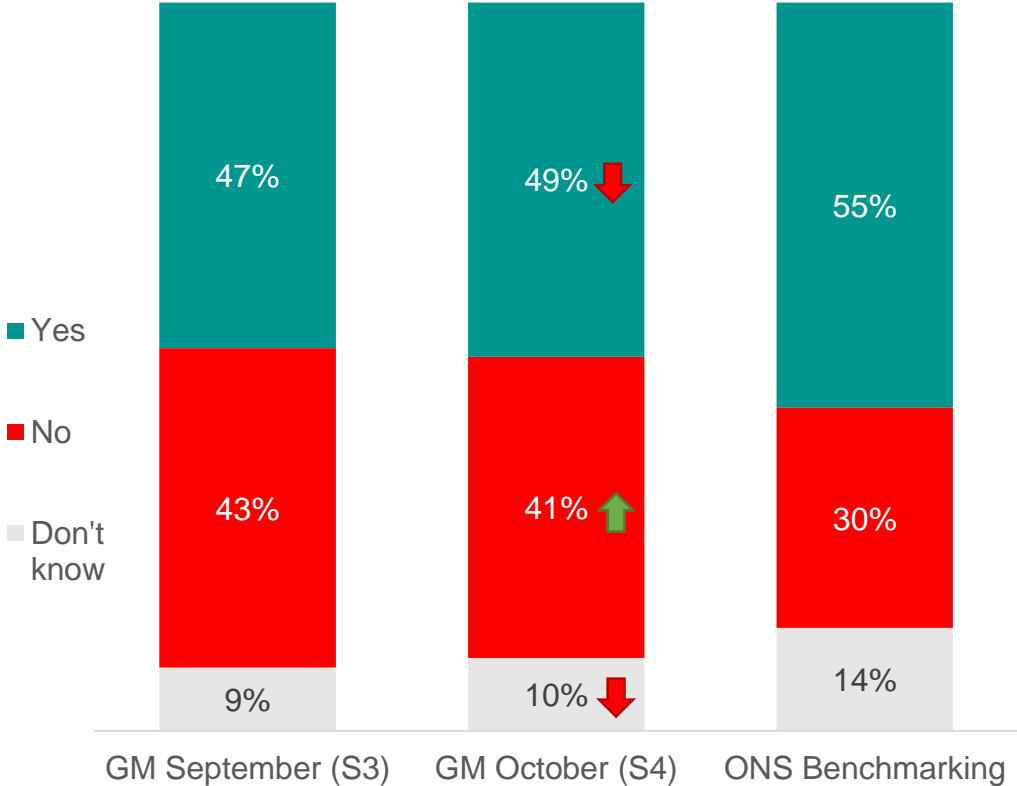
↑ ↓ Significantly higher/lower than the ONS Benchmark

Greater Manchester respondents are less likely than the ONS GB average to be able to **afford an unexpected expense** (49% able to afford vs. 55% able to afford). Around a third of respondents say they will be able to **save money over the next 12 months** (36%)

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



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

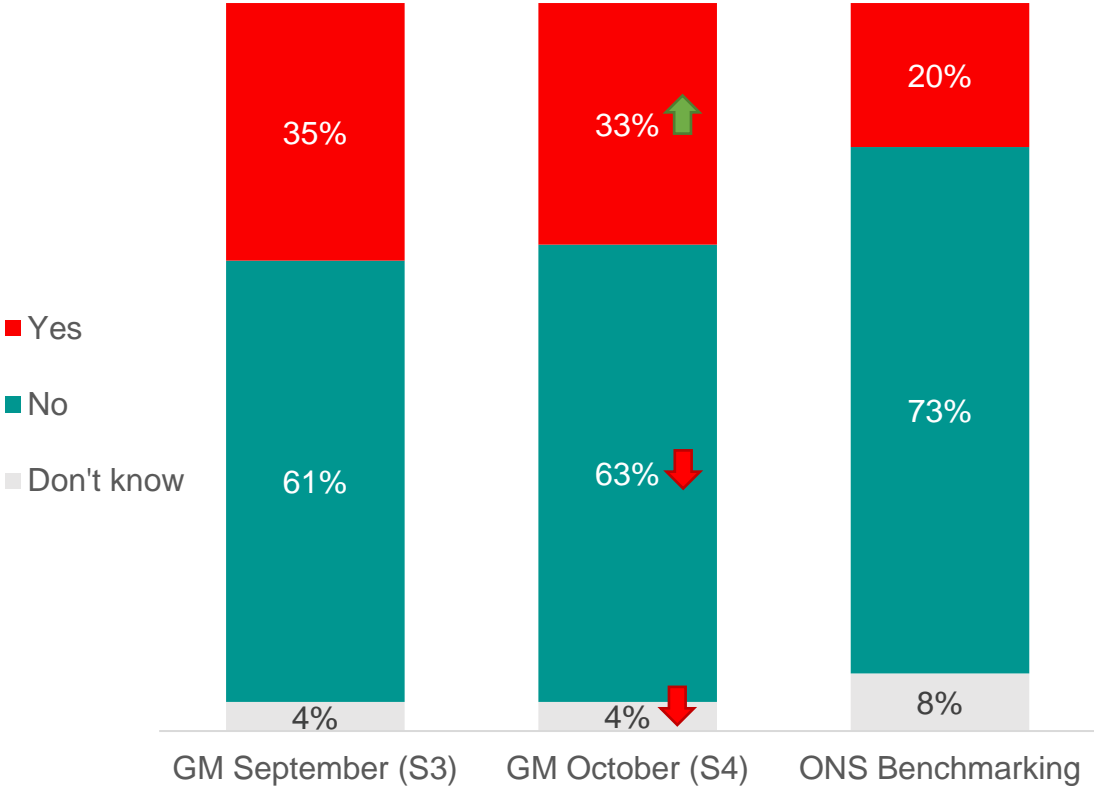


↑ ↓ Significantly higher/lower than the ONS Benchmark

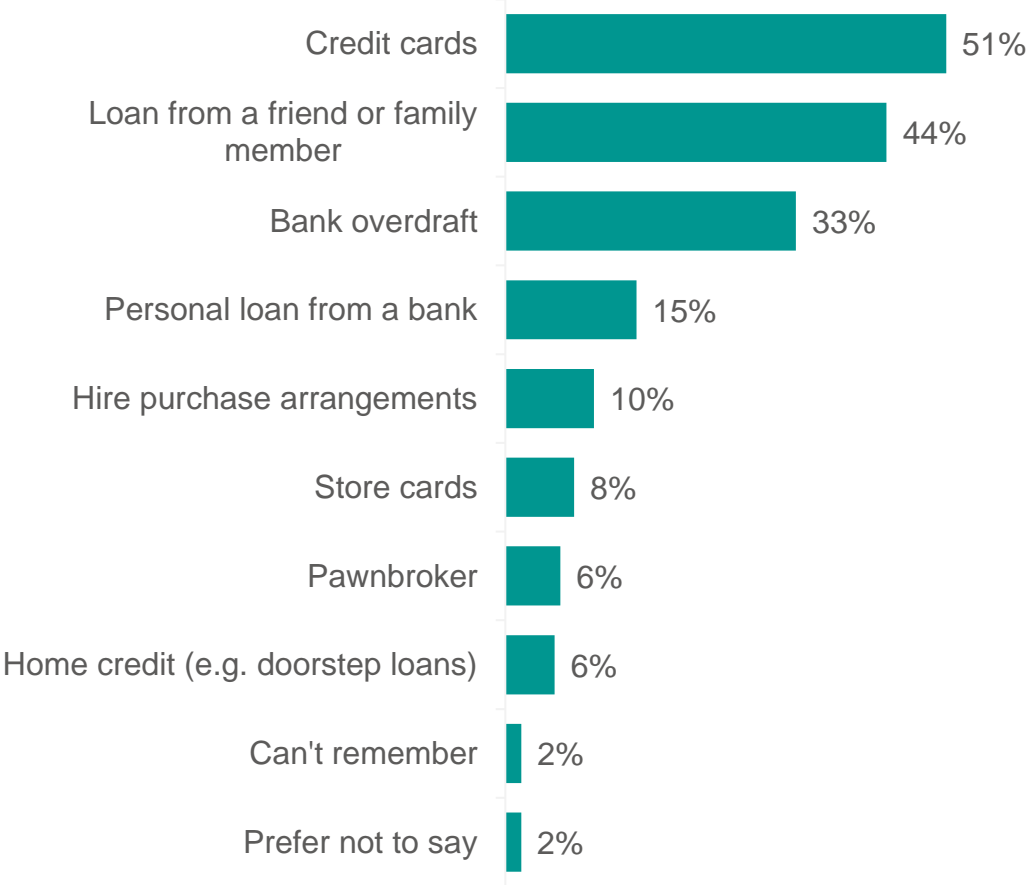
CL1. In view of the general economic situation, do you think you will be able to save any money in the next 12 months? CL3. Have you had to borrow more money or use more credit than usual in the last month, compared to a year ago? CL2. Could your household afford to pay an unexpected, but necessary, expense of £850? Unweighted base: Survey 3, 1677; Survey 4, 1636 (All respondents)

Compared with the GB average, Greater Manchester respondents are more likely to have borrowed more money in the past month than compared to the same time last year (33% vs. 20%). Of those who have done so, half have used credit cards (51%), followed by loans from friends and family (44%)

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



Which of the following places have you borrowed money or used credit from



↑ ↓ Significantly higher/lower than the ONS Benchmark

CL3. Have you had to borrow more money or use more credit than usual in the last month, compared to a year ago? CL3A. You said you have had to borrow more money or use more credit than usual in the last month compared to a year ago. Please select which of the following places you have borrowed this money or used credit from. Unweighted base: Survey 3, 1677; Survey 4, 1636 (All respondents). 515 (All who have borrowed more money or used more credit)

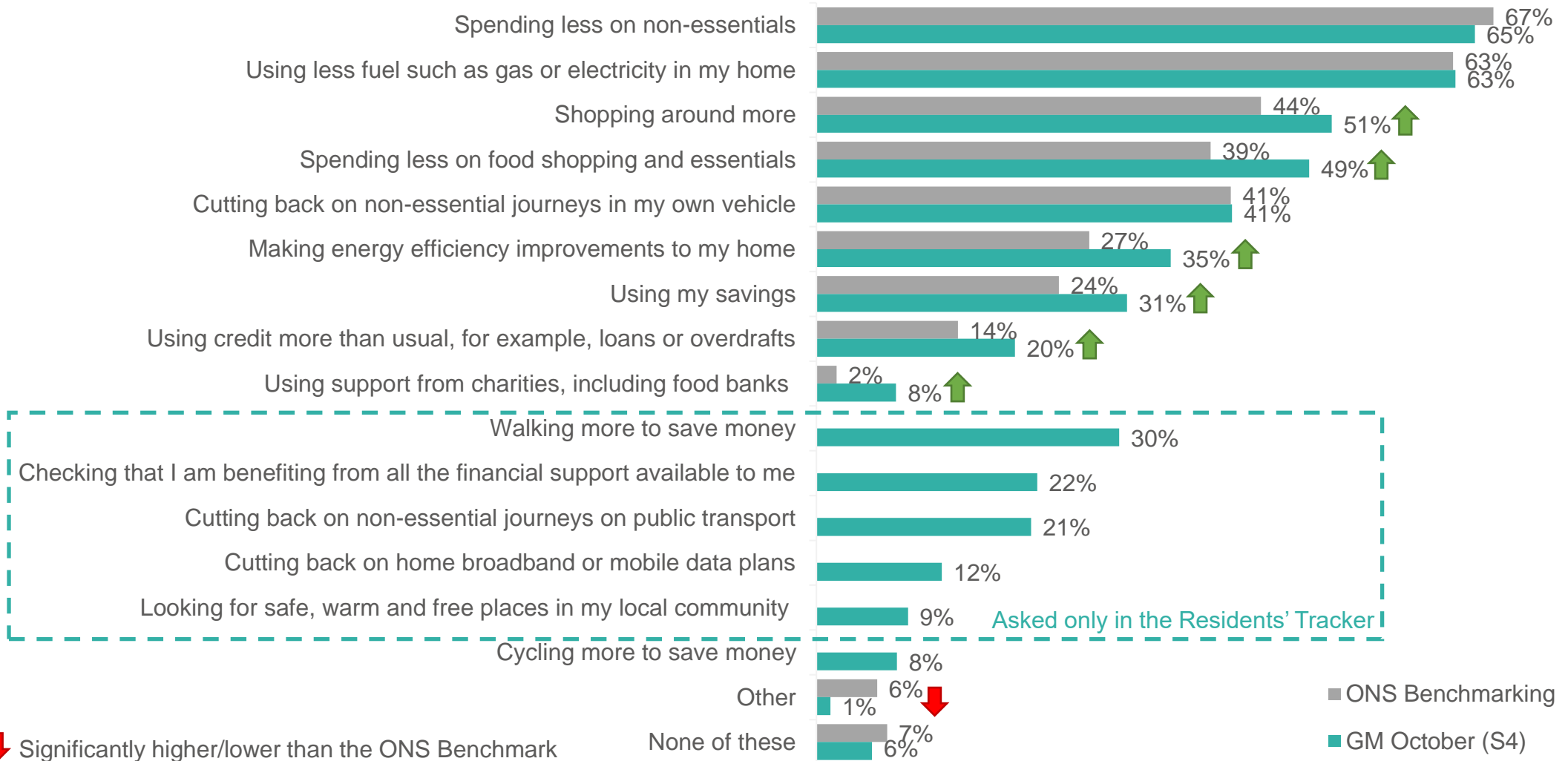
Parents of younger children, respondents from within racially minoritised communities and lower-income backgrounds are more likely to **have borrowed more/used more credit than the same time a year ago**

Cannot afford an unexpected but necessary expense of £850*	Borrowed more or used more credit in the past month compared to a year ago*
<p>Greater Manchester average: 41%</p> <ul style="list-style-type: none"> • Disabled respondents (61%); including those with mental ill health (77%), mobility disability (59%) • Parents of children under 5 (57%) • Parents of children in primary school (53%) <p>Individual and/or family circumstance</p> <ul style="list-style-type: none"> • Those not in work due to ill health or disability (83%) • Those who have cut the size of or skipped a meal (76%); or someone else in the household has (65%) • Those who have not eaten all day for lack of money (74%); nor has someone else in their household (59%) • Those who find it difficult to afford rent or mortgage (71%) • Those who have had to borrow more or use more credit in the last month (68%) • Those who are renting (68%) • Those earning up to £15,599 (64%) • Those whose children are entitled to free school meals (61%) • Those who find it difficult to afford their energy costs (59%) • Homemakers (59%) • Those who have a pre-payment meter (55%); including those who have had it for more than 12 months (57%) • Those unlikely to get neither the flu nor Covid-19 vaccine (57%) • Those earning below the Real Living Wage (57%) • Those considering switching to a pre-payment meter (55%) 	<p>Greater Manchester average: 33%</p> <ul style="list-style-type: none"> • Parents of children in primary school (51%) • Disabled respondents (58%); including those with mental ill health (55%); a mobility disability (59%); another type of disability (56%) • Parents with children under 5 (54%); 5-15 (46%) • Muslim respondents (50%) • Bisexual respondents (49%) • Those within racially minoritised communities (48%); including Asian respondents (47%) • 25-34-year-olds (47%) • Those whose first language is not English (47%) <p>Individual and/or family circumstance</p> <ul style="list-style-type: none"> • Those who have not eaten all day for lack of money (62%); or have had someone else in their household do so (59%) • Those who have cut the size of or skipped a meal (62%); or someone else in the household has (58%) • Those who have considered switching to a pre-payment meter (60%) • Those who find it difficult to afford rent and mortgage (60%) • Those entitled to free school meals (58%) • Those who have contacted more than one organisation for advice and support with paying their energy bills in the last 3 months (56%) • Those with no access to the internet (51%) • Those not in work due to ill health or disability (47%) • Those who are renting (46%)

CL3. Have you had to borrow more money or use more credit than usual in the last month, compared to a year ago? CL2. Could your household afford to pay an unexpected, but necessary, expense of £850? Unweighted base: 1636 (All respondents) *Groups with a base size below 50 are not included

Respondents in Greater Manchester are more likely than the ONS GB average to be **shopping around more (51% vs 44%), using their savings (31% vs 24%) and spending less on food shopping and essentials (49% vs 39%), as a result of the rising cost of living**

Actions taken due to rise in cost of living*

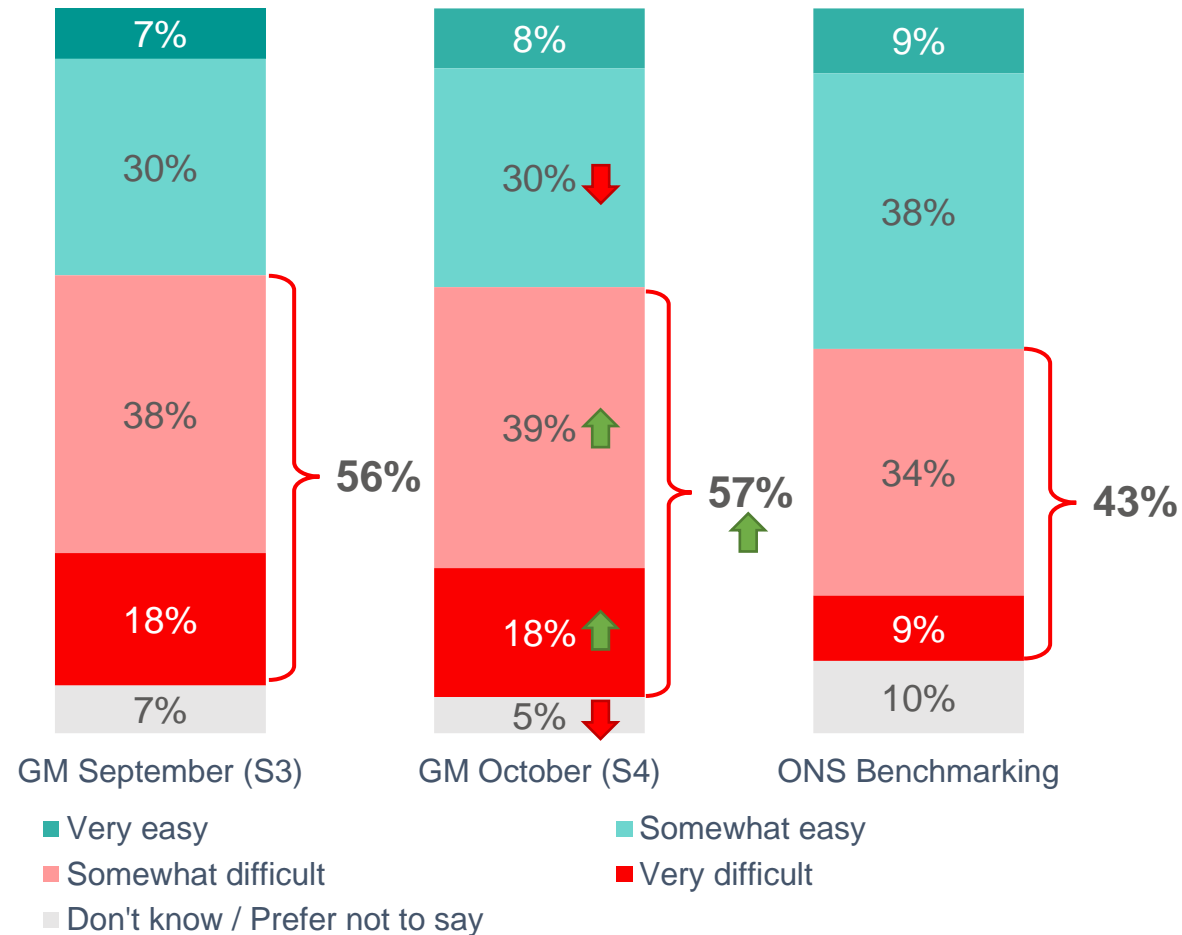


CL7. Which of these, if any, are you doing because of the increases in the cost of living?

Unweighted base: Survey 4, 1636 (All respondents) *ONS question wording has slightly changed between GM Residents' Surveys 3 and 4. In order to remain comparable with the ONS data, GM wording has also been updated

Almost 3 in 5 (57%) say they are having **difficulty being able to afford their energy costs**, significantly higher than the GB average (43%). Parents and disabled respondents are among those more likely to find it difficult

Ease of affording energy costs



↑ ↓ Significantly higher/lower than the ONS Benchmark

% who are significantly more likely to find it very/somewhat difficult to afford their energy costs compared to GM average (57%)*

Demographics

- Disabled respondents (72%); mental ill health (79%); with a mobility disability (69%); or other disability (71%)
- Parents of children under 5 (72%)

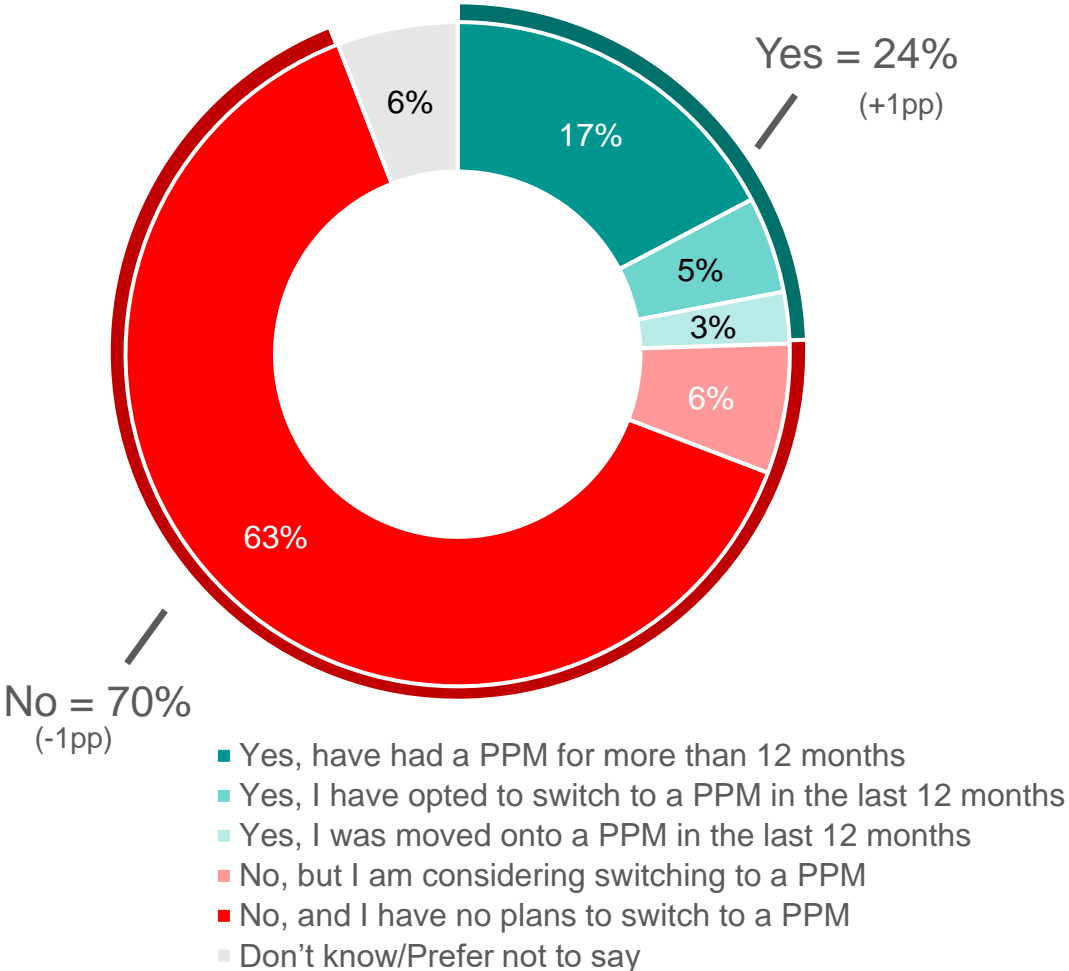
Individual and/or family circumstance

- Those who find it difficult to afford their mortgage (94%)
- Those who have cut the size or skipped a meal (85%); or have someone else in the household has done so (80%)
- Those who have not eaten the whole day for lack of money (81%); nor has someone else in their household (78%)
- Those considering switching to a pre-payment meter (80%)
- Those who have had to borrow more or use more credit in the past month (78%)
- Those not in work due to ill health or disability (78%)
- Those whose children are entitled to free school meals (74%)
- Those unable to save money in the next 12 months (74%)
- Those earning up to £15,599 (74%)
- Those earning below the Real Living Wage (72%)
- Homemakers (71%)

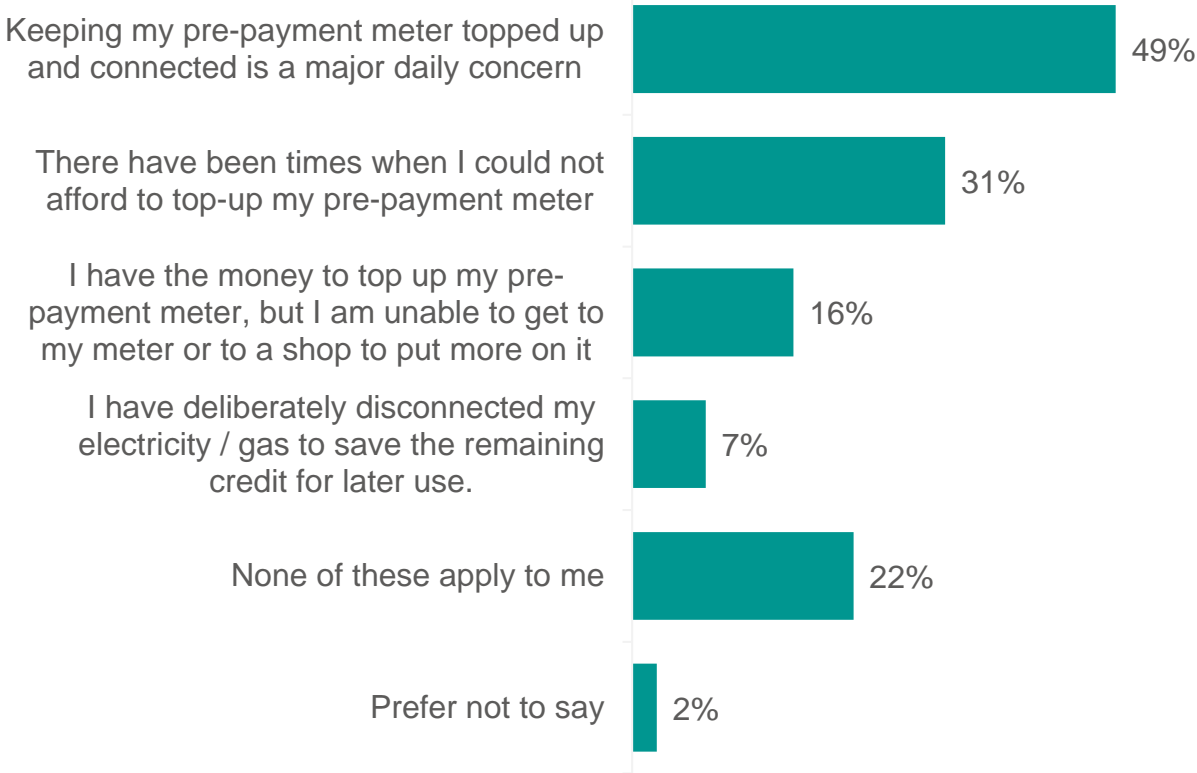
*Groups with a base size below 50 are not included

As in September, around a quarter of respondents to the Residents' Survey reported being on a pre-payment meter (PPM) (24%), with 8% having moved onto a PPM in the last 12 months. Almost half of those with a meter (49%) say they are concerned about keeping it topped up and connected on a daily basis, with almost 1 in 3 (31%) saying they have been unable to top-up their PPM at times

Do you have a pre-payment meter? (PPM)



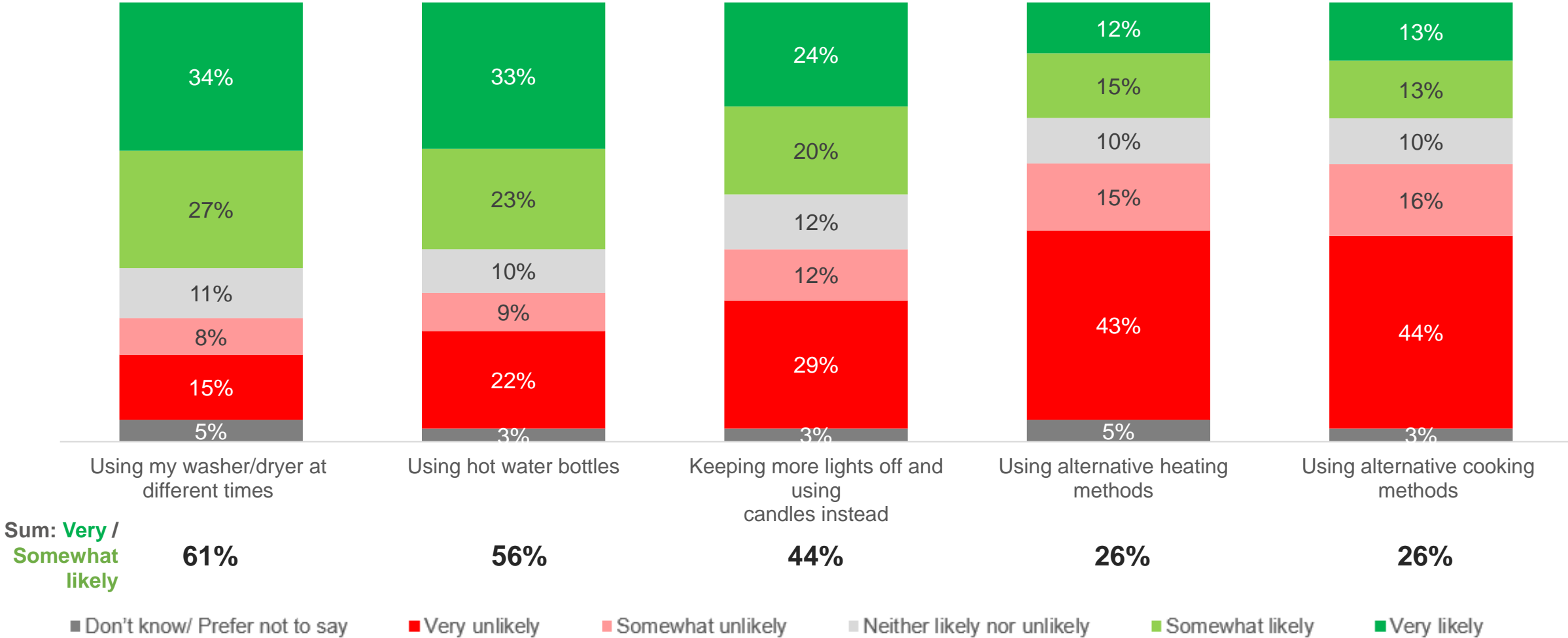
Of those with a pre-payment meter, any of these happened in the past month? (n=345)



CL8. Do you have a prepayment meter (pay-as-you-go meter) in your current home? CL8A. Citizens Advice are reporting that across the UK many energy customers with a prepayment meter are having to go without pay-as-you-go power (known as self-disconnection). Thinking about your use of your pre-payment meter, please select whether any of the following have happened to you in the last month? Unweighted base: Survey 3, 1677; Survey 4, 1636 (All respondents); 345 (All with a pre-payment meter)

Over half of respondents say they are likely to **use their washer/dryer at different times to save on energy costs** (61%) and to **use hot water bottles** (56%). Respondents are less likely to consider using alternative heating methods (26%) or cooking methods (26%)

Likelihood of doing the following because of the rising cost of living

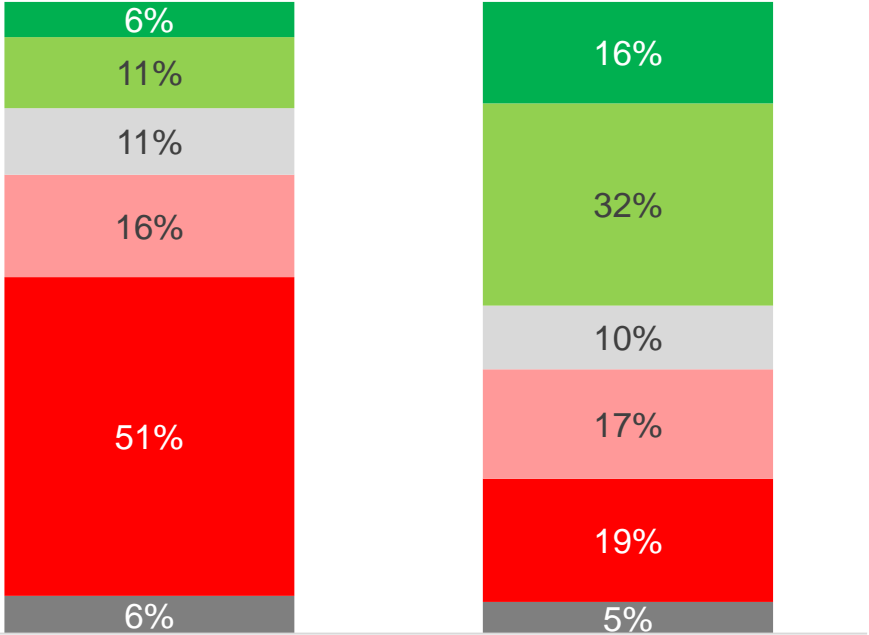


CL15B. How likely or unlikely are you to consider doing any of the following because of the rising cost of living?
Unweighted base: 1636 (All respondents)

Those who do not already own an electric blanket or a portable heater are very unlikely to buy one in response to the rising cost of living. Half (48%) of electric blanket owners who don't currently use theirs are likely to start using it, compared to a third (34%) of portable heater owners

Likelihood of doing the following because of the rising cost of living

For those who don't own or rarely use an electric blanket



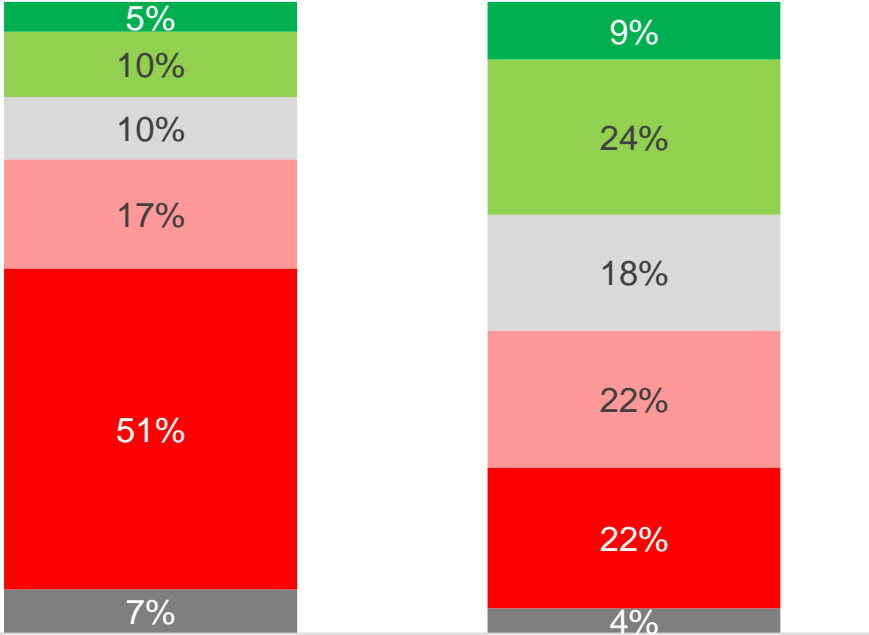
Buying an electric blanket for your bed

Using an electric blanket you already own but don't normally use

17%

48%

For those who don't own or rarely use a portable heater



Buying a portable heater

Using a portable heater that you already own but don't normally use

15%

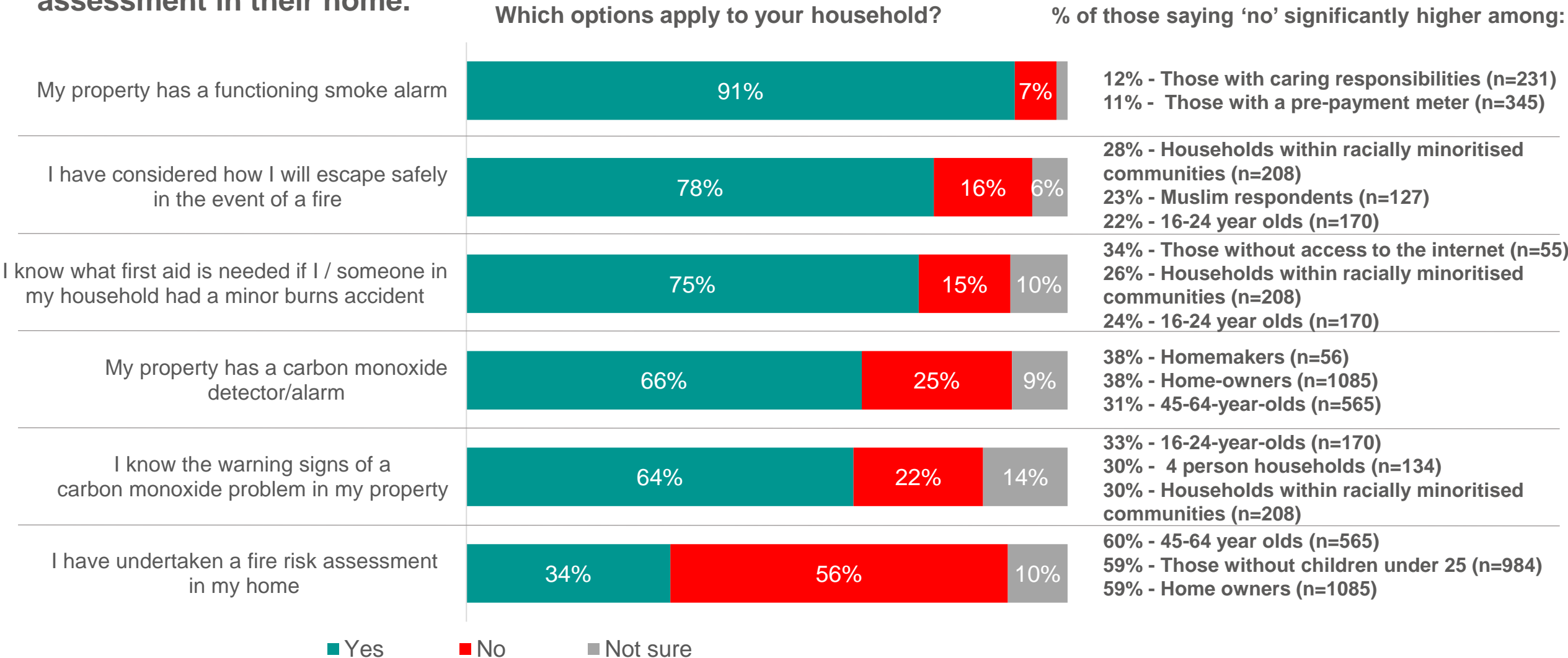
34%

Sum: Very / Somewhat likely

■ Don't know/ Prefer not to say ■ Very unlikely ■ Somewhat unlikely ■ Neither likely nor unlikely ■ Somewhat likely ■ Very likely

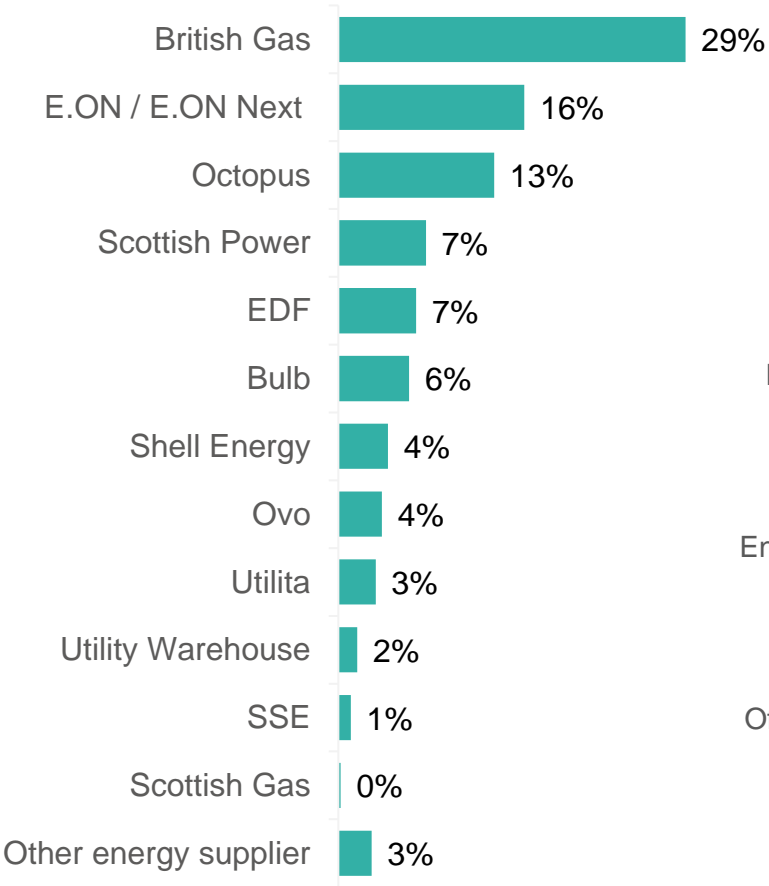
CL15B. How likely or unlikely are you to consider doing any of the following because of the rising cost of living?
 Unweighted base: 1207 (All who do not own an electric blanket); 166 (All who own but don't use an electric blanket); 806 (All who do not own a portable heater); 382 (All who own but don't use a portable heater)

The vast majority (91%) of respondents have a functioning smoke alarm in their home. However, this was less true amongst some household types and demographics (including households within racially minoritised communities). Across the sample as a whole, over half (56%) have not undertaken a fire risk assessment in their home.



British Gas is the most common (29%) energy supplier for Greater Manchester residents. Satisfaction with energy suppliers is highest for reassuring messages. Over 2 in 5 (43%) are satisfied with their energy suppliers' helping consumers find information on reducing their energy bills

Who is your energy supplier?



Satisfaction with your energy supplier

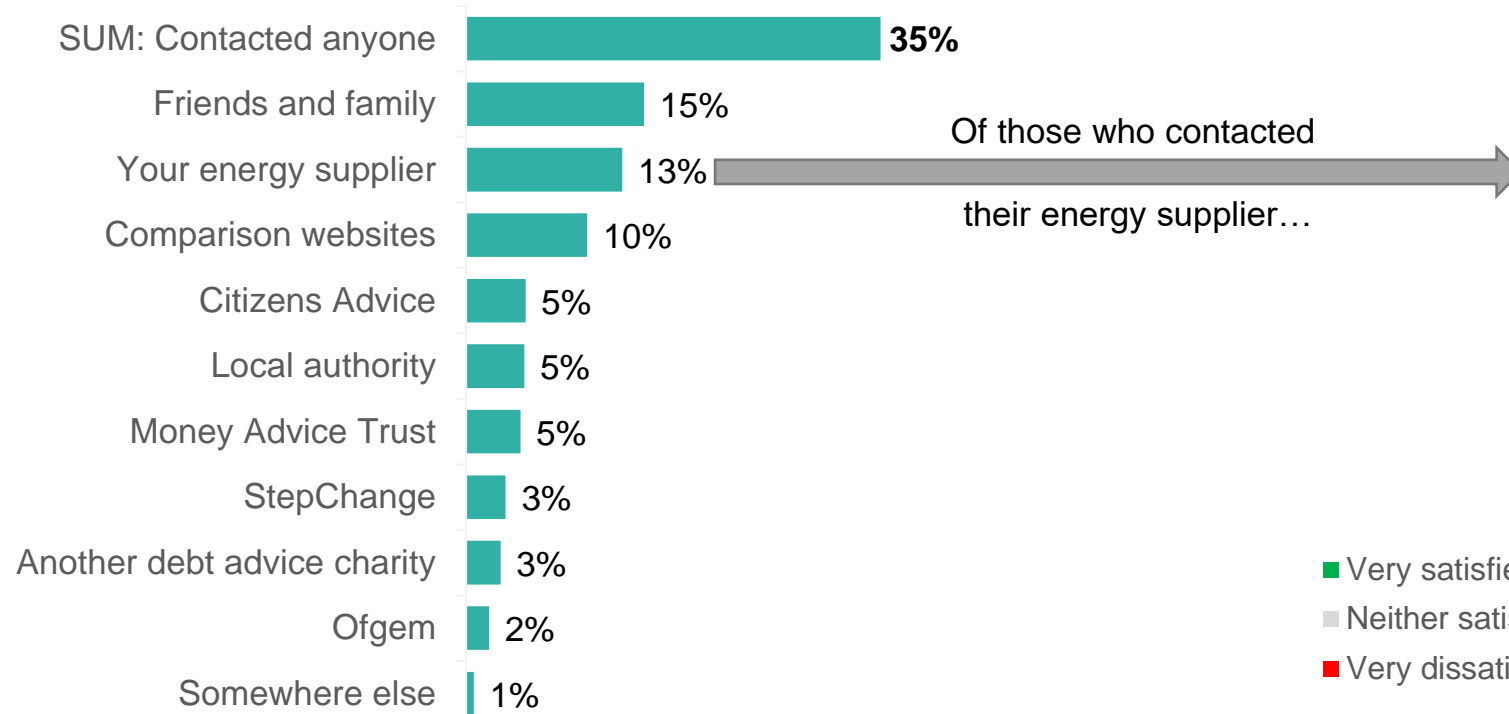


■ Very satisfied
 ■ Somewhat satisfied
 ■ Neither satisfied nor dissatisfied
■ Somewhat dissatisfied
 ■ Very dissatisfied
 ■ Don't know / Prefer not to say

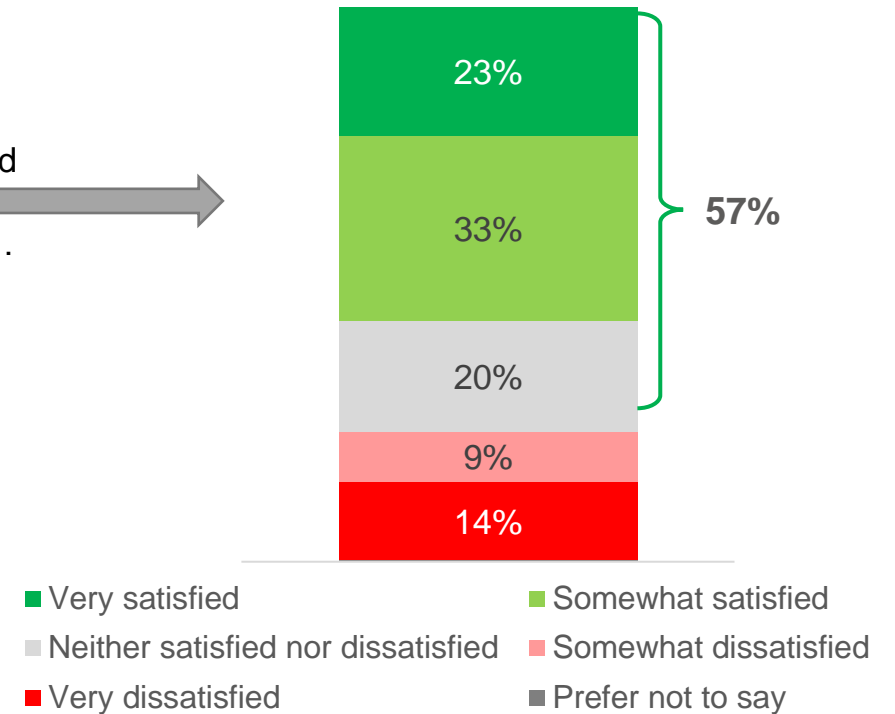
CL17. Who is your energy supplier? CL18. How satisfied or dissatisfied are you with your current energy supplier on the following issues?
 Unweighted base: 1636 (All respondents); 1540 (All with an energy supplier); 333 (All with a pre-payment meter) *Question was asked only to those on a pre-payment meter

Around a third (35%) of respondents have contacted someone for advice on paying their energy bills in the past 3 months. Of the 13% who chose to approach their energy supplier for advice, almost 3 in 5 were satisfied with their support

Contacting any of the following for support with energy bills in the past 3 months



Satisfaction with support from energy supplier



% who are significantly more likely to have contacted anyone for support with their energy bills compared to GM average (35%)

- Those who have opted to switch to a pre-payment meter in the last 12 months (77%)
- Those with no access to the internet (67%)
- Those who have not eaten all day for lack of money (66%), or have someone else in their household done so (71%)

Food security

Key findings

Approach and sample

Introduction to the food security score

Overview of food security

Past 12 months activity

page 34

page 35

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pages 37-40

pages 41-44

Food security – key findings

- **EXTENT OF FOOD INSECURITY ACROSS GM (%):** 40% of all respondents who answered the most recent GM Residents' Survey had a food security level classified either as 'low' or 'very low' – and have therefore experienced food insecurity in the last twelve months.
- **EXTENT OF FOOD INSECURITY ACROSS GM (NUMBER OF HOUSEHOLDS AFFECTED):** Assuming that this sample is representative of the Greater Manchester population, this is equivalent to approximately 470,000 households across the conurbation reporting some experience of food insecurity during the last 12 months ('low' or 'very low' food insecurity).
- **TRENDS SINCE SEPTEMBER:** The issue of food security has been explored in detail in previous surveys of the GM Residents' Survey. Comparing latest results with those from **September fieldwork**, food insecurity is shown to have remained stable (affecting 40% of households, compared to 42% of households in September).
- **HOUSEHOLDS WITH CHILDREN:** Food insecurity continues to impact disproportionately upon households with children (with 59% now reporting food insecurity at some point in the last year). This has increased since September (56%), and since original benchmarking in the spring (a merged sampled of February and April data, at 51%).
- **HOUSEHOLDS WITHOUT CHILDREN:** Overall food insecurity for households without children has dropped from 34% in September to 30% in October. However, it is important to note that levels of 'very low food security' have remained the same since the previous month (20% in September vs. 19% in October). Those not in work due to ill health or disability (64%), aged 16-24 (56%), those within a racialised minority community (50%) and disabled respondents (46%) are significantly more likely to have experienced food insecurity.

Approach and sample – Food security

Approach

This report presents summary findings for survey 1 & 2, survey 3 and survey 4 of the 2022 research study of a representative sample of the Greater Manchester population. In this section the sample for the first two surveys, both conducted in spring 2022, has been merged and compared to the results from survey 3 and survey 4.

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

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

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

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

Sample breakdown

Sample info

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

	September	October
FW start	1 September 2022	20 October 2022
FW end	30 September 2022	3 November 2022
Total respondents	1677	1636
Sample used in FS score	1442	1366
Live with children u18	400	419
Do not live with children u18	1042	947

The food security score

Approach

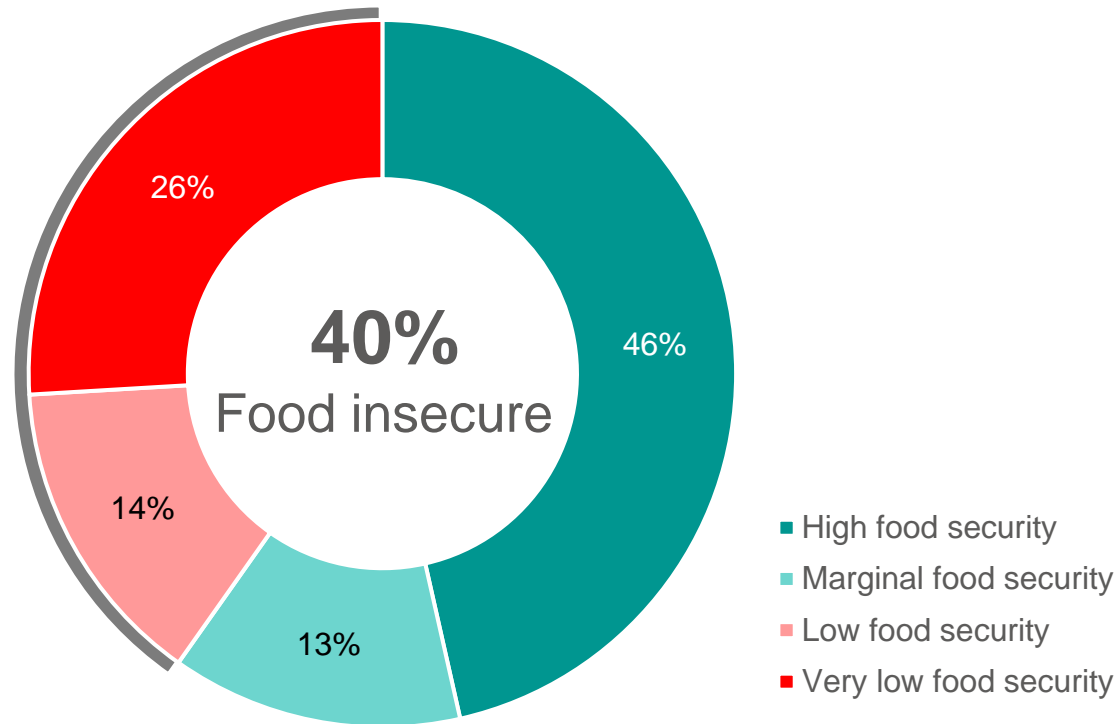
- As mentioned on the previous slide, this food security score is based on an adapted version of the score used by the USDA.
- As part of the residents' survey, respondents were asked questions relating to food security.
 - All respondents: Questions B2 (statements 1-3), B3 (all statements), AD1a, AD1b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

Food security score

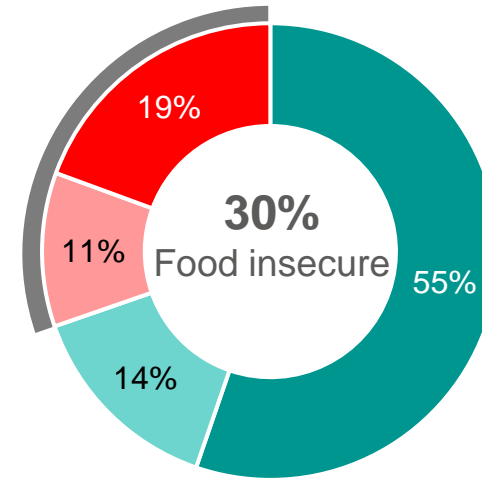
Total points	Household with children	SUM: Food secure/ insecure	Total points	Household with children	SUM: Food secure/ insecure
0	High food security	Food secure	0	High food security	Food secure
1	Marginal food security		1	Marginal food security	
2			2		
3	Low food security	Food insecure	3	Low food security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

Summary: Food security in October (survey 4)

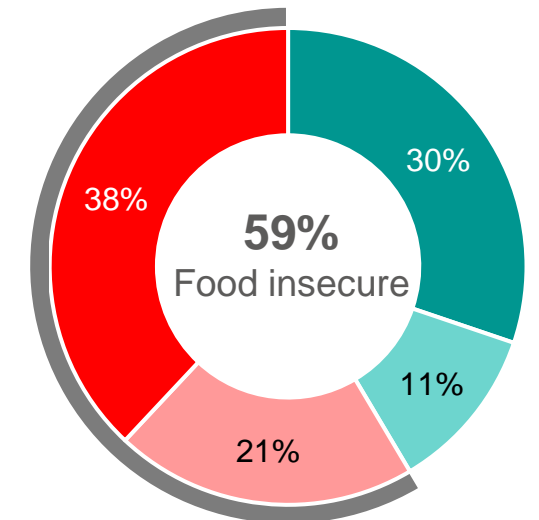
Food security – GM overall (n=1366)



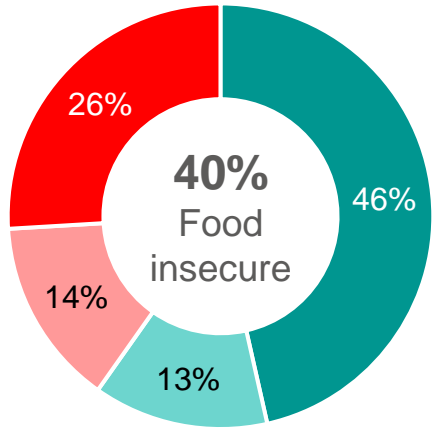
Households without children (n=864)



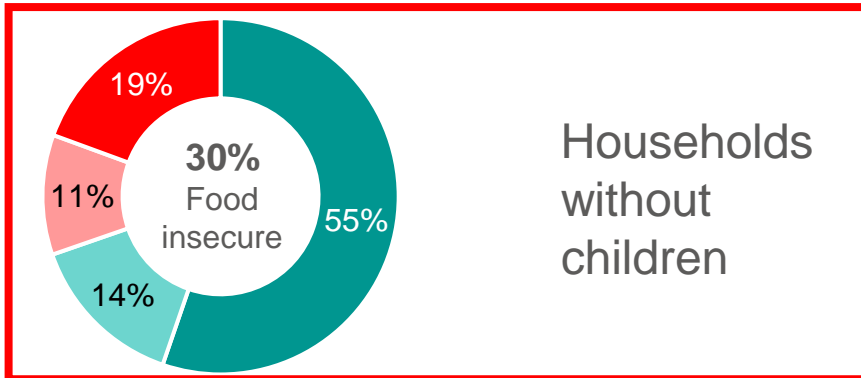
Households with children (n=467)



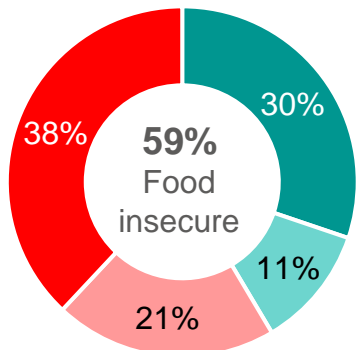
Summary: Food security in October (survey 4) – Households without children



Greater Manchester overall



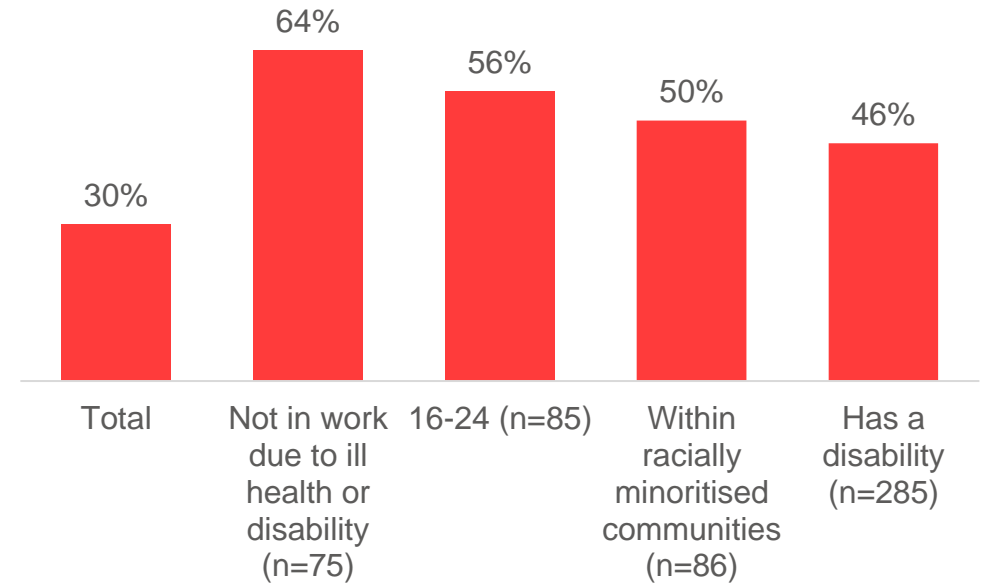
Households without children



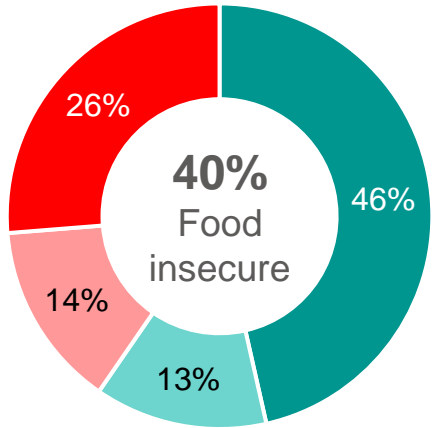
Households with children

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

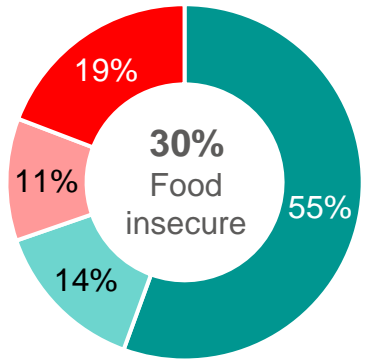
% food insecurity higher among...



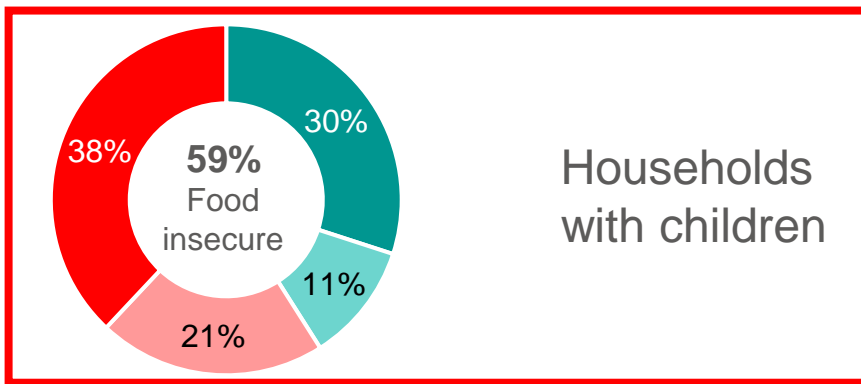
Summary: Food security in October (survey 4) – Households with children



Greater Manchester overall



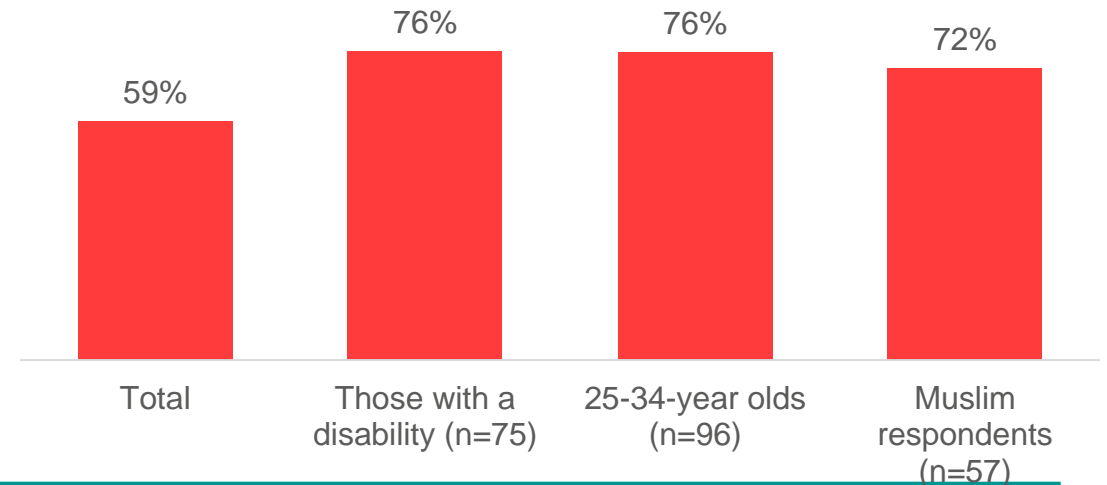
Households without children



Households with children

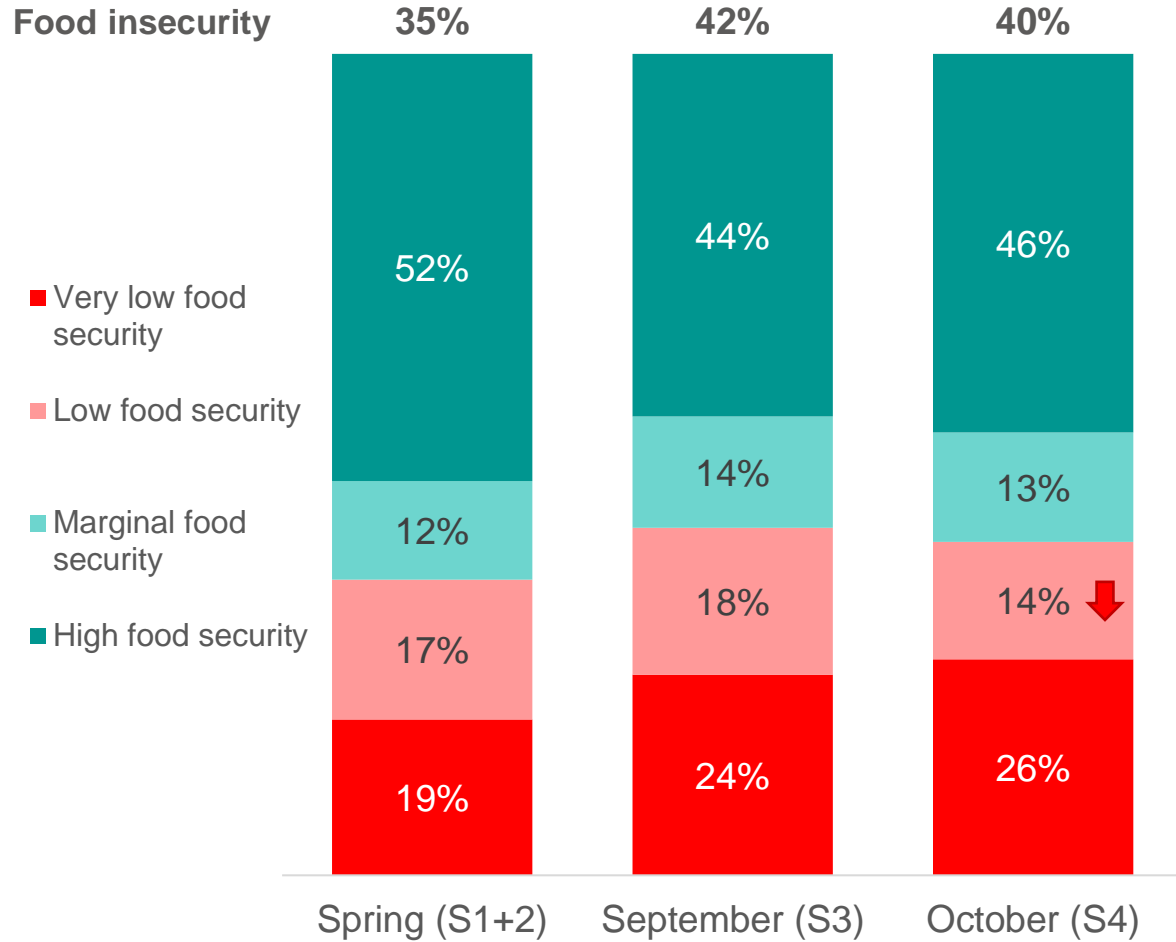
- High food security
- Marginal food security
- Low food security
- Very low food security

% food insecurity higher among...

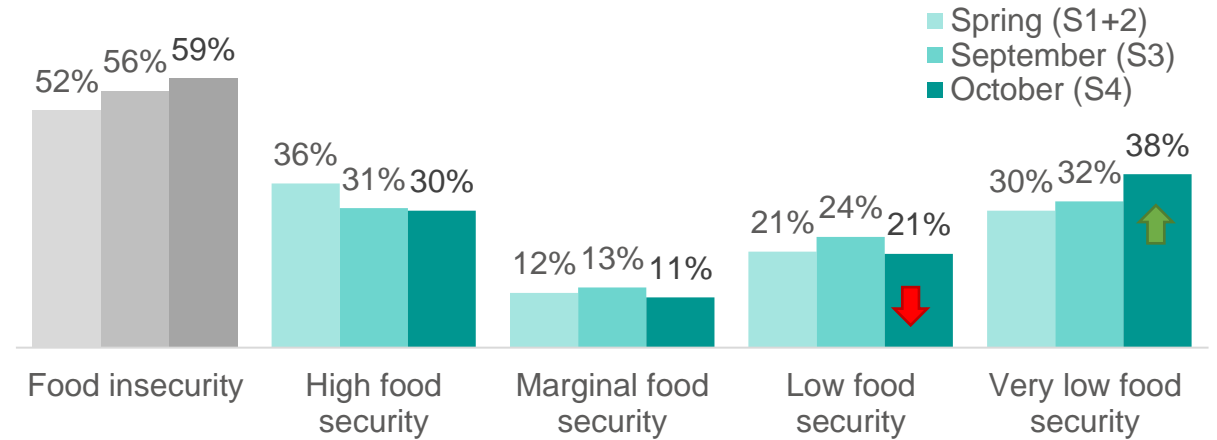


Summary: Food security – spring (survey 1+2), September (survey 3) and October (survey 4) comparison

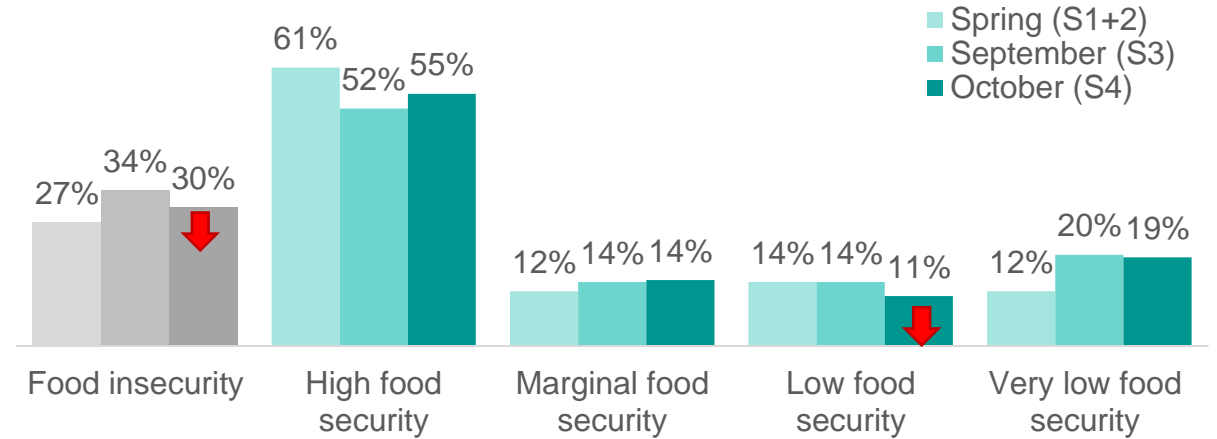
Food security – Overall



Food security – Households with children



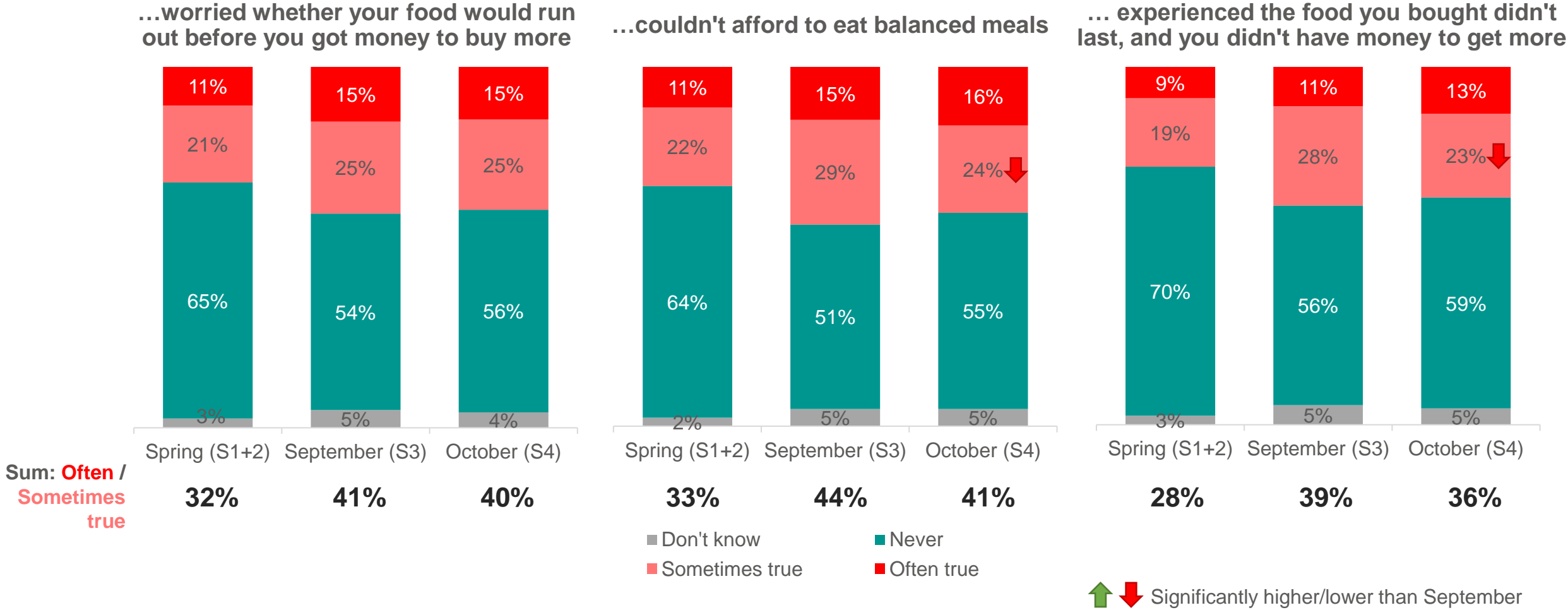
Food security – Households without children



↑ ↓ Significantly higher/lower than September

The proportion of respondents who are **worried about their food running out** (41% to 40%) has not changed significantly since September. Those who **couldn't afford balanced meals** and whose **food didn't last and couldn't afford more** often has decreased since last wave (29% to 24% and 28% to 23%).

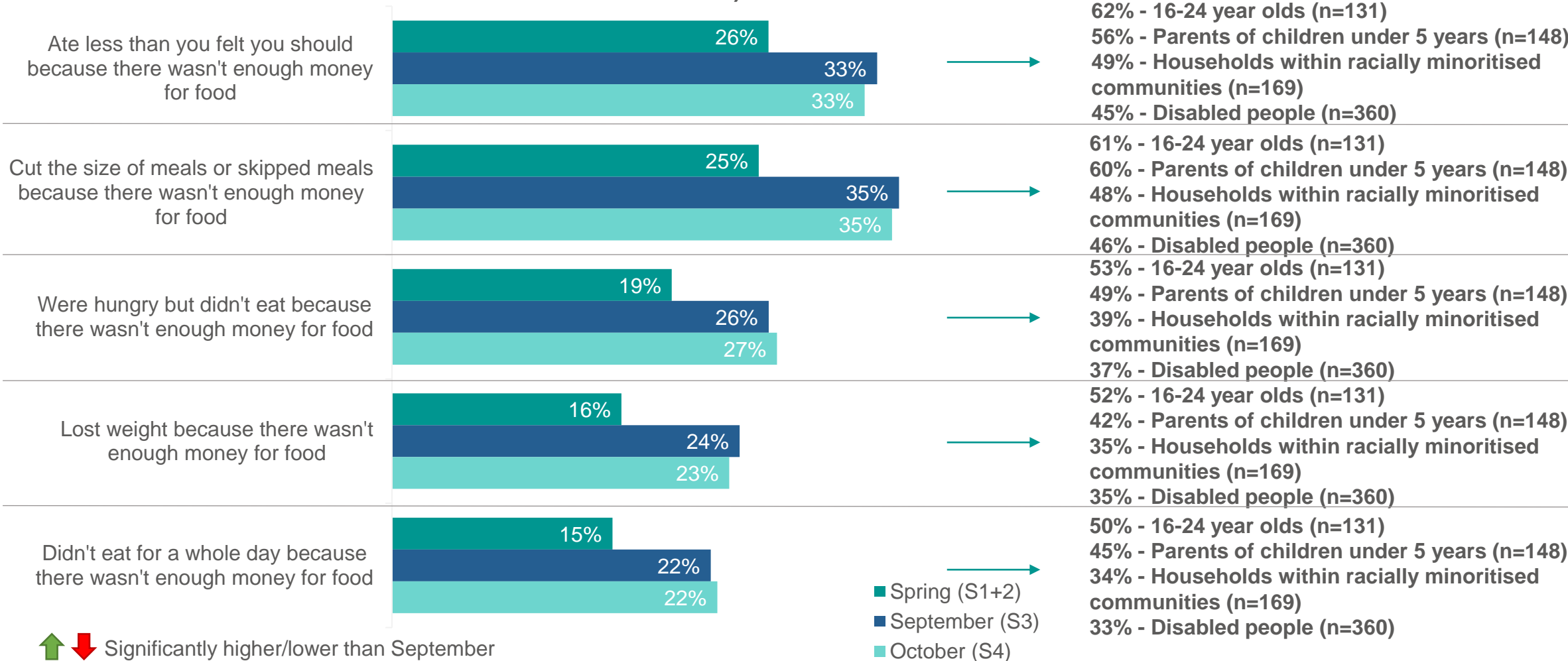
In the past twelve months, have you...?



B2. How true would you say the following statements are when applied to your household for the last 12 months?
 Unweighted base: Survey 1+2, 2840 (All respondents); Survey 3, 1442; Survey 4, 1366 (Online respondents)

The proportion of households in Greater Manchester having their **eating habits impacted in any way due to lack of money** has remained stable since September. Almost 1 in 4 respondents (22%) say they have not eaten for a whole day for lack of money for food

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



↑ ↓ Significantly higher/lower than September

■ Spring (S1+2)
 ■ September (S3)
 ■ October (S4)

Survey 4 significantly higher among*:

- 62% - 16-24 year olds (n=131)
- 56% - Parents of children under 5 years (n=148)
- 49% - Households within racially minoritised communities (n=169)
- 45% - Disabled people (n=360)

- 61% - 16-24 year olds (n=131)
- 60% - Parents of children under 5 years (n=148)
- 48% - Households within racially minoritised communities (n=169)
- 46% - Disabled people (n=360)

- 53% - 16-24 year olds (n=131)
- 49% - Parents of children under 5 years (n=148)
- 39% - Households within racially minoritised communities (n=169)
- 37% - Disabled people (n=360)

- 52% - 16-24 year olds (n=131)
- 42% - Parents of children under 5 years (n=148)
- 35% - Households within racially minoritised communities (n=169)
- 35% - Disabled people (n=360)

- 50% - 16-24 year olds (n=131)
- 45% - Parents of children under 5 years (n=148)
- 34% - Households within racially minoritised communities (n=169)
- 33% - Disabled people (n=360)

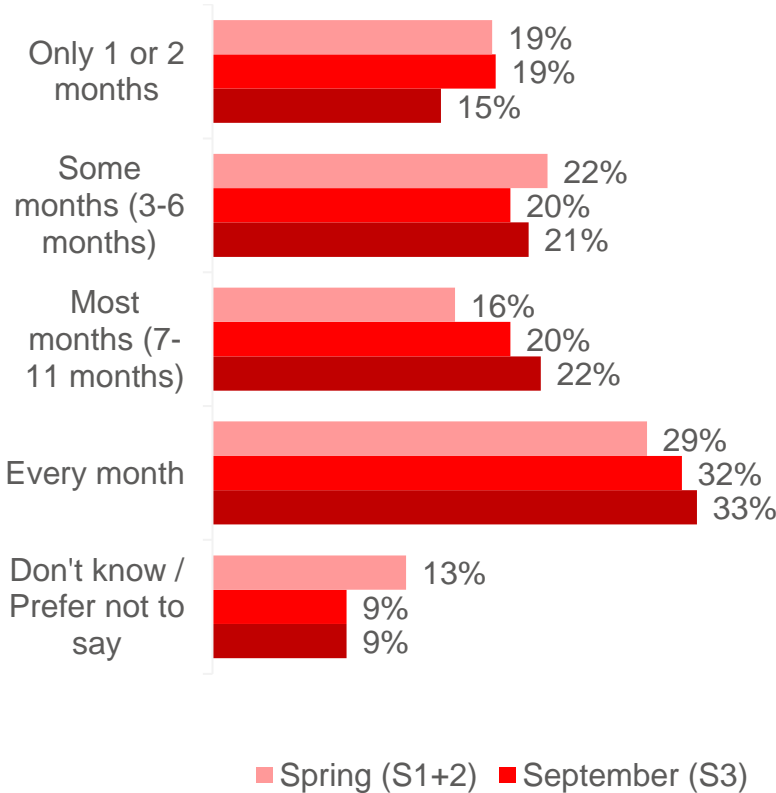
B3. In the past 12 months have any of the following happened to you or someone else in your household?
 Unweighted base: Survey 1+2, 2340; Survey 3, 1442; Survey 4, 1366 (Online respondents)

*Groups with a base size below 50 are not included

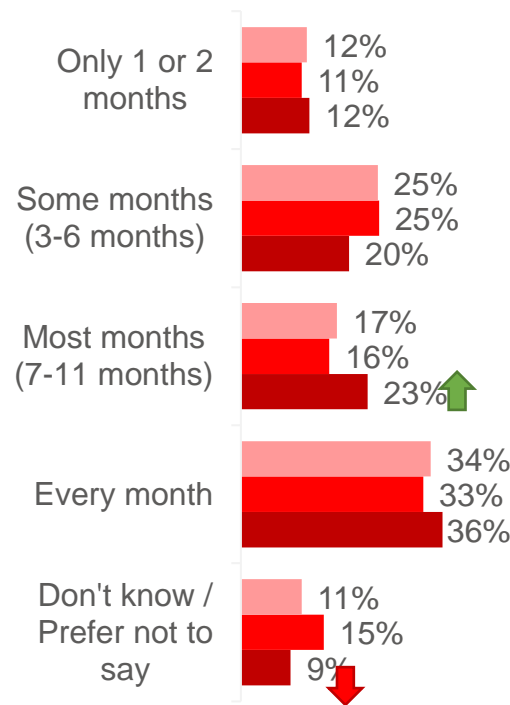
Around a third of respondents who are cutting the size of meals (33%) or who are not eating for a whole day (36%) are **having to do this every month. The proportion of respondents not eating for a whole day most months has increased significantly since September (23% vs. 16%)**

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

... cut the size of your meals or skip meals because there wasn't enough money for food? (35% of respondents, n=429)



... not eaten for a whole day because there wasn't enough money for food? (22% of respondents, n=299)



% cutting the size of their meals every month is significantly higher compared to average (33%) among...*

Demographics

- 45-64-year-olds (57%)
- Disabled respondents (43%); including a mobility disability (53%); mental ill health (44%)
- 1 person households (44%)
- British respondents (36%); White respondents (35%)

Individual and/or family circumstance

- Those not in work due to ill health or disability (64%)
- Those who have not eaten all day for lack of money (52%)
- Those earning up to £15,599 (46%)
- Those not in employment (40%)
- Those who have borrowed money or used more credit in the last month than they did last year (38%)
- Those who find it difficult to afford rent or mortgage (38%)

*Groups with a base size below 50 are not included

↑ ↓ Significantly higher/lower than the Greater Manchester Residents' survey 3

Food insecurity continues to have a range of impacts on families – however, respondents with children in their household are not significantly more or less likely than they were in September to be experiencing these impacts at home

In the last year...

	Spring S1+2	Sept S3	Oct S4
I relied on only a few kinds of low-cost food to feed the children in my household because I was running out of money to buy food	42%	36%	37%
I couldn't feed the children in my household a balanced meal, because I couldn't afford that	26%	25%	24%
I cut the size of any of the children's meals because there wasn't enough money for food	20%	17%	22%
The children in my household were not eating enough because I just couldn't afford enough food	20%	19%	21%
Any of my children were hungry but I just couldn't afford more food	21%	17%	21%
Any of my children skipped a meal because there wasn't enough money for food	17%	22%	22%
Any of my children did not eat for a whole day because there wasn't enough money for food	15%	17%	16%

Parts of the population significantly more likely to often rely on low-cost food to feed children compared to Survey 4 average (10%) include*:

- Individual and/or family circumstance**
- Those who have contacted more than one organisation for help with paying energy bills (21%)
 - Those renting from their local authority or council (19%)
 - Those who have a pre-payment meter (18%)
 - Those likely to get both the flu and Covid-19 vaccine this winter (13%)

*Unweighted base: 467 (Respondents with children in the house) Groups with a base size below 50 are not included

■ Often ■ Sometimes ■ Never

↑ ↓ Significantly higher/lower than the Greater Manchester Residents' September (S3)

Living safely and fairly with Covid-19

Key findings

[page 46](#)

Overview

[pages 47-48](#)

Covid-19 anxiety

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Vaccinations

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Covid-19 infections and lasting impacts

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Covid-19-safe behaviours

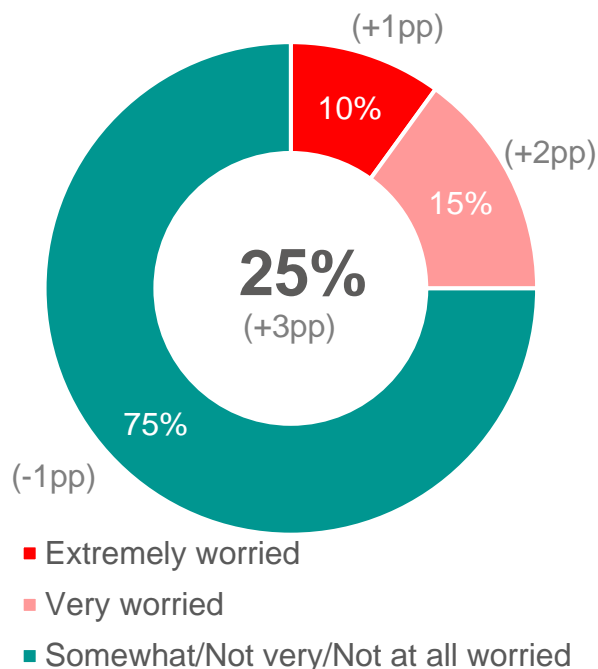
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Living safely and fairly with Covid-19 – key findings

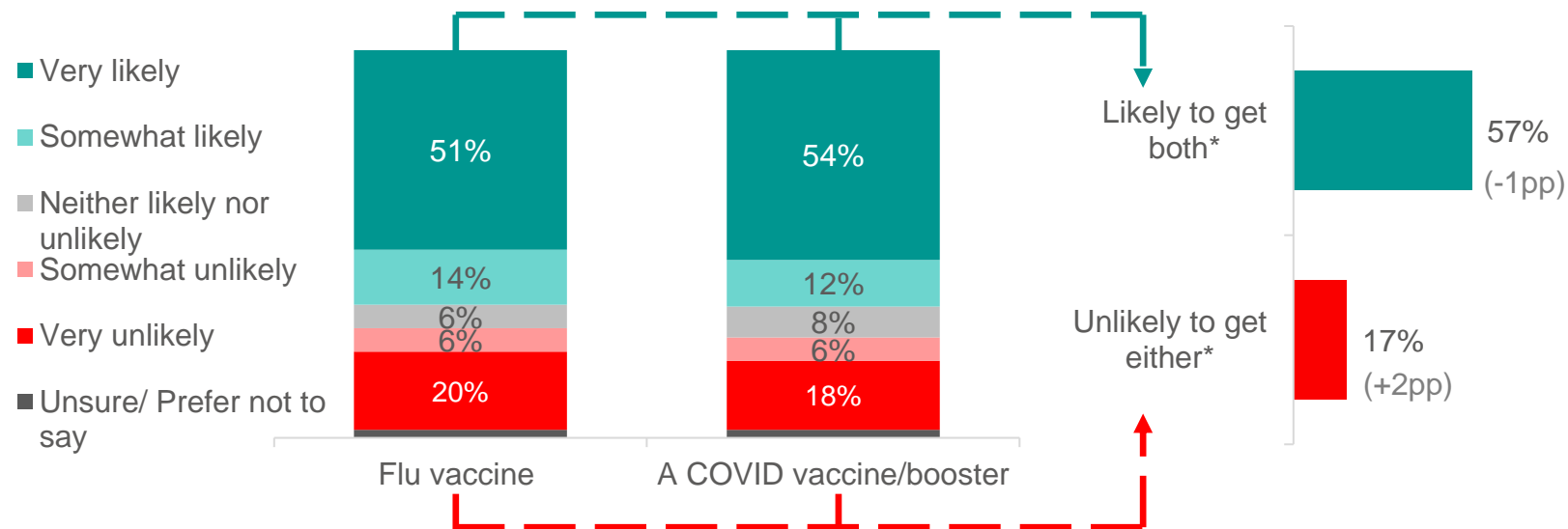
- **WORRIES / CONCERNS:** A quarter of respondents (25%) are still extremely or very worried about Covid-19 and its impacts. This is an increase from 22% in the previous survey.
 - **COVID-19 INFECTIONS:** Around 6 in 10 respondents (62%) say they have had coronavirus at some point – including half of respondents (53%) who had their infection confirmed by a positive test.
 - **LONG COVID:** Around four in ten respondents who have had coronavirus (42%) say they are still experiencing impacts as a direct result. The most common of these are enduring physical health impacts (experienced by over a quarter (27%) of those who have had Covid-19); 15% say they are still experiencing direct mental health impacts and 1 in 10 are experiencing financial impacts (10%).
 - **COVID-19-SAFE BEHAVIOURS:** Respondents remain just as likely as they were in September to be adopting most Covid-19 safe behaviours. 1 in 4 respondents are still wearing face coverings (25% in crowded spaces, 25% on public transport). More than three quarters still say they regularly wash or sanitise their hands (80%), or stay away from work if they feel unwell (79%). There has been a decline since September in the proportion of respondents opening windows and doors when inside with people from outside their household (39% cf. 48%), coinciding with the colder weather in Autumn.
 - **VACCINATIONS:** Similar proportions of respondents say they would get a Covid-19 vaccine or booster or a Flu vaccine if offered this winter – with around two in three very or somewhat likely to do so (66% Covid-19, 65% Flu) and around one in five very unlikely (18% Covid-19, 20% Flu). Likelihood of uptake has not changed since September.
-

Summary: Living safely and fairly with Covid-19 – worry levels and attitudes towards vaccines

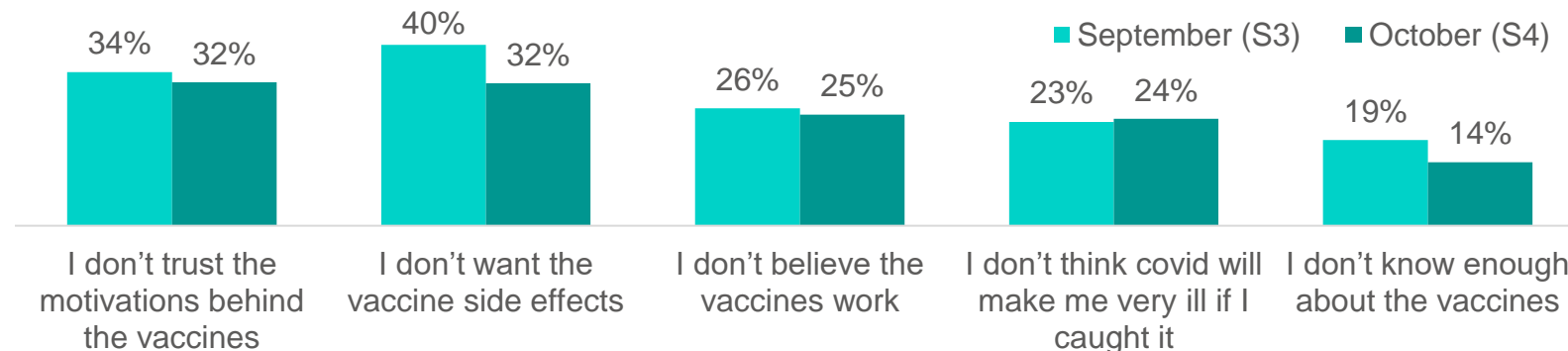
Overall, a quarter of respondents are still extremely or very worried about Covid-19 and its impacts



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



The most common reasons for not getting a Covid-19 vaccine are not wanting the vaccine side effects, and not trusting the motivations behind them (n=350)

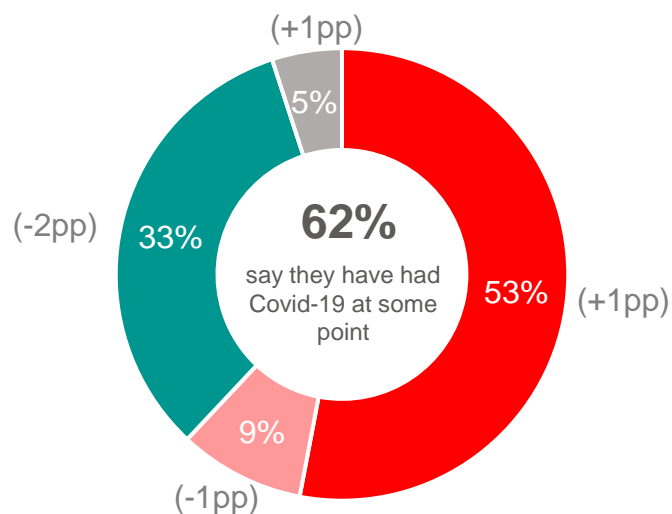


All data is from Survey 4 only. Unweighted base: 1,636 (All respondents)

* Likely to get both and unlikely to get either based on analysis of a combined % of "very" + "somewhat" likely/unlikely

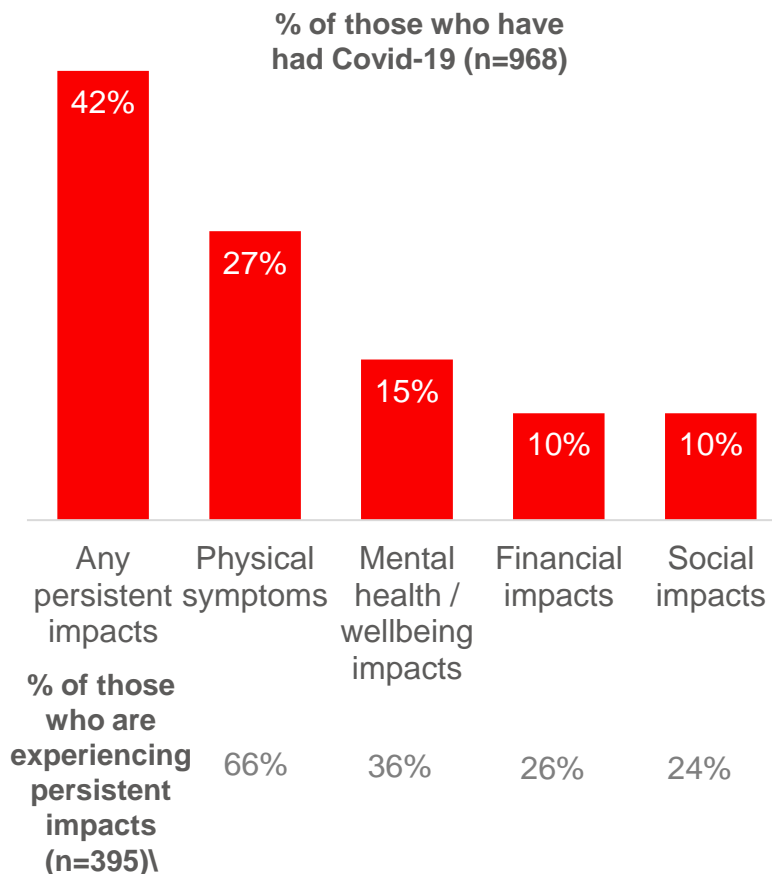
Summary: Living safely and fairly with Covid-19 – Infections, lasting impacts and safe behaviours

Just over half of respondents say they have definitely had Covid-19 before, and a further one in ten think they probably have

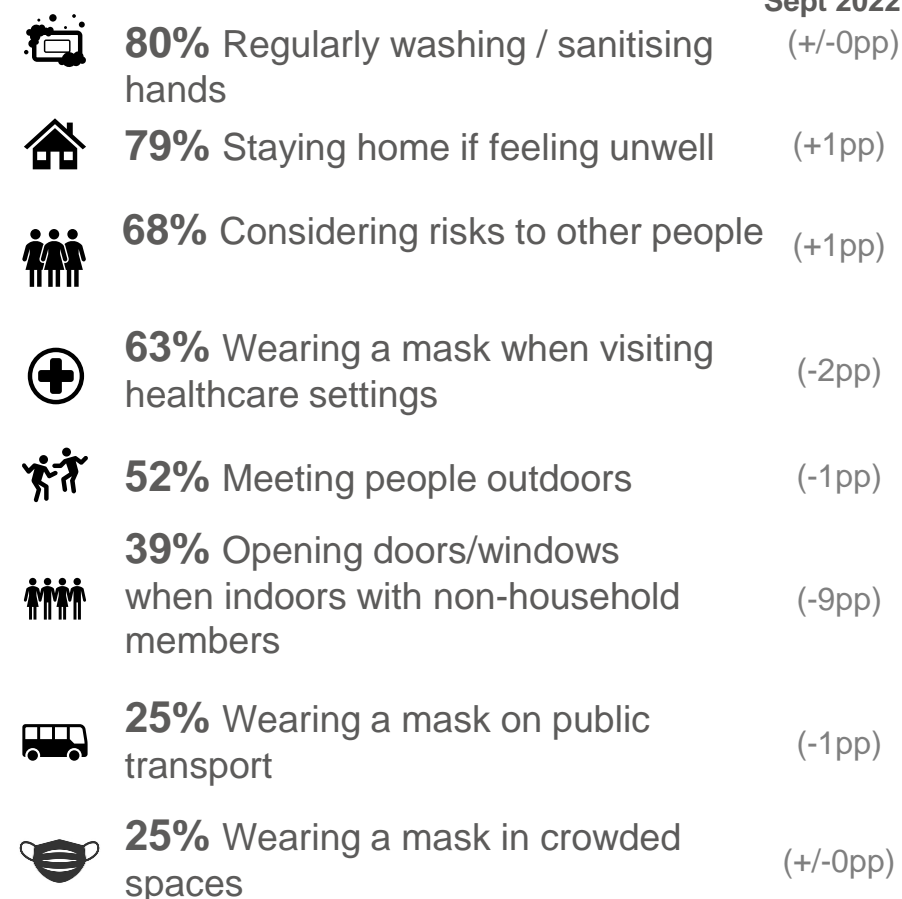


- Yes – definitely (ie tested positive)
- Yes – probably (had symptoms, but not confirmed by positive test)
- No
- Not sure/prefer not to say

42% of those who have had Covid-19 still have impacts, of which:

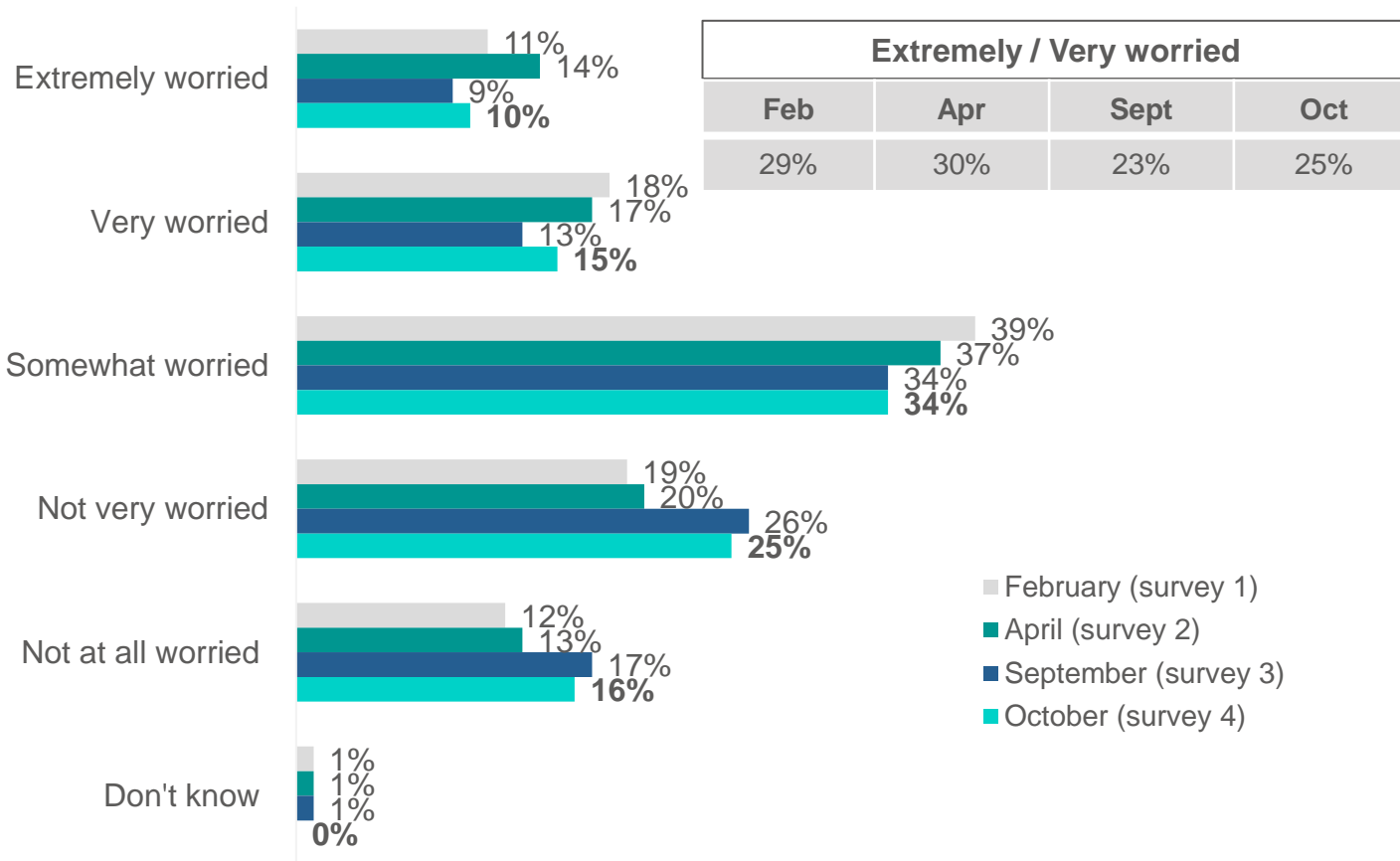


Respondents are less likely than they were in September to be opening doors and windows when indoors with non-household members



Overall, a quarter (25%) of respondents are **very or extremely worried about Covid-19**, a slight increase from levels in September. Those more worried continue to be those who might struggle with access to food and those who have caring responsibilities

Overall, how worried are you about Covid-19?



↑ ↓ Significantly higher/lower than September (Survey 3)

Respondents more likely to be extremely/very worried about Covid-19 (vs. 25% GM average)*:

Demographics

- Those who currently have caring responsibilities (45%)
- Those with a disability (33%) including; those with a mobility disability (40%); those with mental ill health (37%)
- Households within racially minoritised communities (31%)

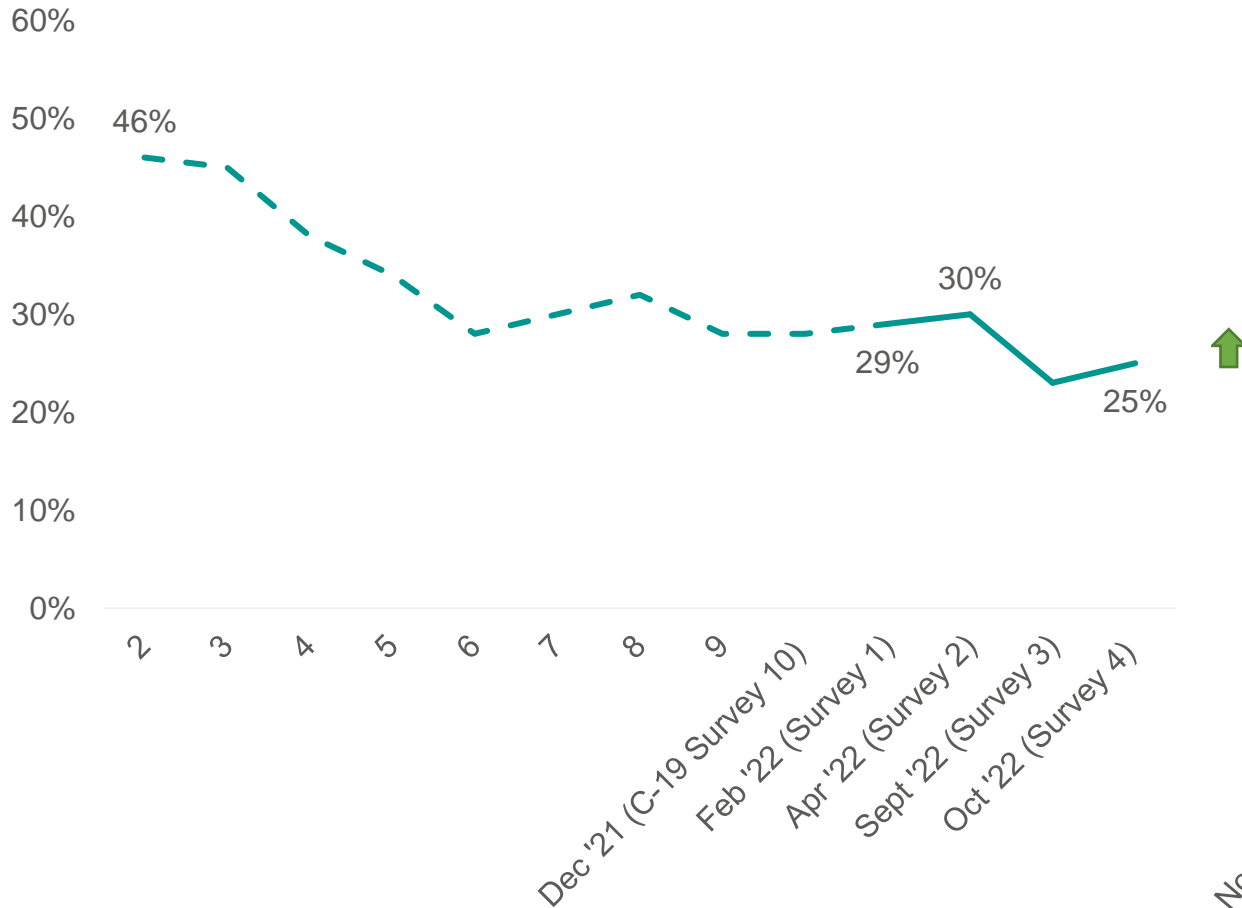
Individual and/or family circumstance

- Those who have cut the size of / skipped meals (43%)
- Those who have someone in the household who have not eaten for a day (52%) or have not eaten themselves (46%) due to lack of money
- Those who have had to borrow money or use more credit in the last month (33%)
- Those who have access to devices that allow access the internet some of the time (24%)
- Those who have children aged 5-15 years old (36%) and the children are entitled to free school meals (38%)
- Those not confident using digital services online (34%)

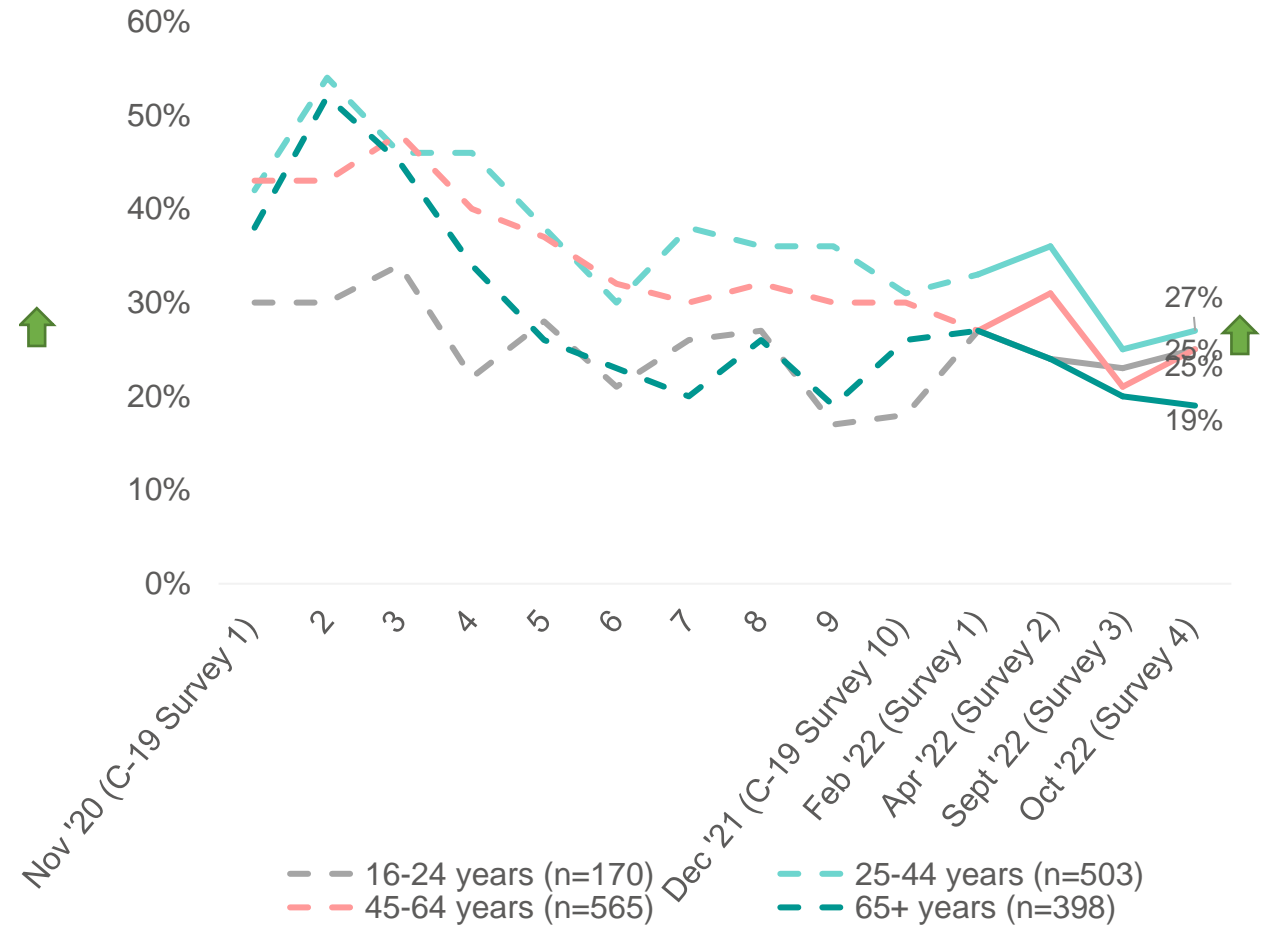
*Groups with a base size below 50 are not included

Those aged 65+ continue to be the age group least worried about Covid-19 (19%), whilst **those aged 45-64 are significantly more worried** about Covid-19 than last wave (21% vs 25%).

% Extremely/very worried about Covid-19 – overall



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



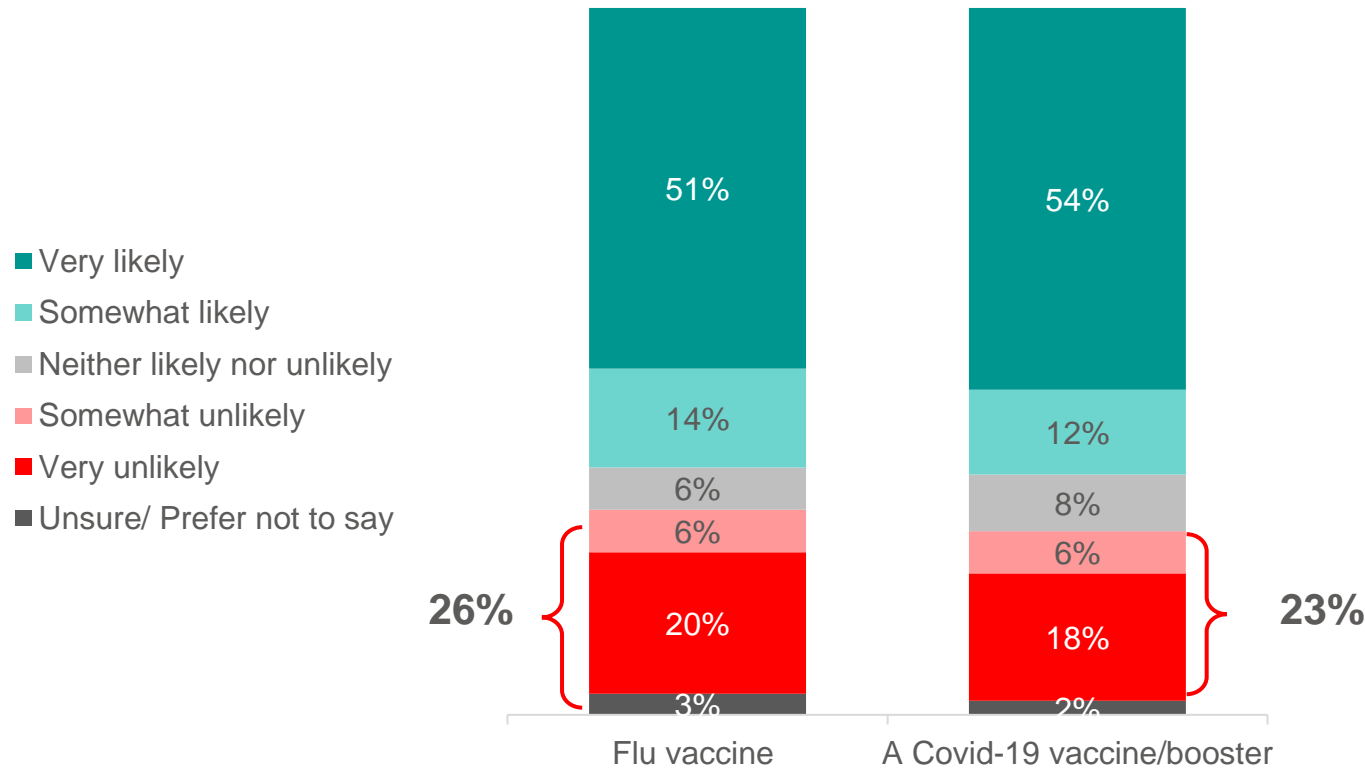
↑ ↓ Significantly higher/lower than September (Survey 3)

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

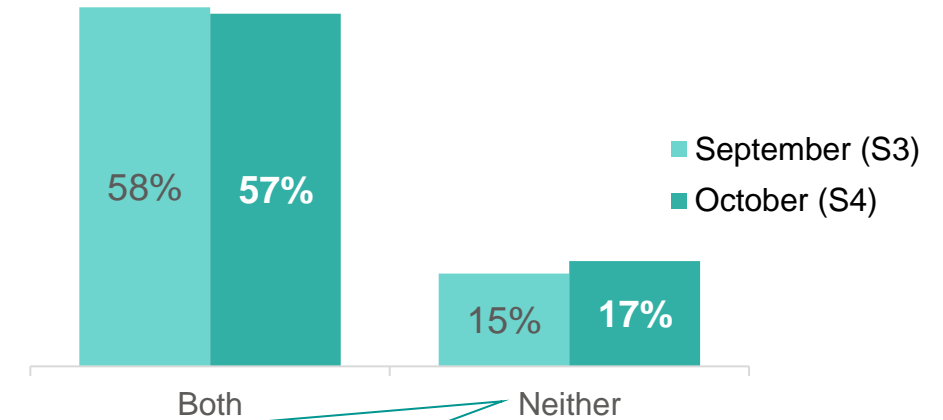
Unweighted base: All respondents: Covid-19 Tracker Survey 1: 1015; Survey 10: 1015; Greater Manchester Residents Survey 1: 1385; Survey 2: 1467, Survey 3: 1677, Survey 4: 1636

Around a quarter of respondents are **unlikely to get a Covid-19 vaccine/booster (23%) or flu jab (26%)** if offered one this winter. Three in five (57%) are likely to get both vaccines, while 17% are unlikely to get either

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



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



% who are significantly less likely to get either vaccine compared to GM average (17%)*:

Demographics

- Those aged 25-44 (25%)
- Those in minority ethnic groups (44%)

Individual and/or family circumstance

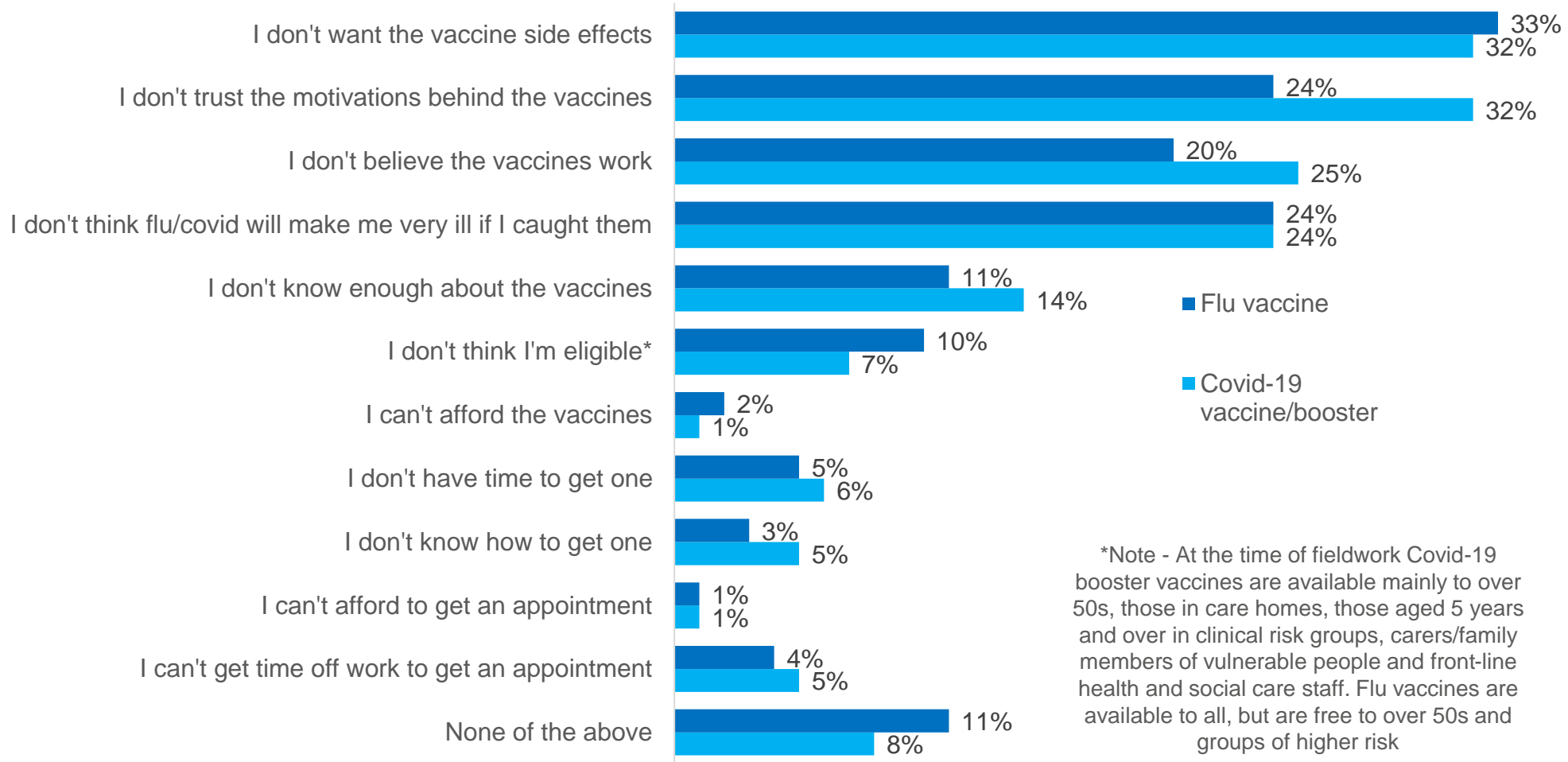
- Those who are not worried about Covid-19 (28%)
- Those who are in full time paid jobs (20%)
- Those who earn above the living wage (20%)
- Those who have children aged 5-15 years old (24%)

ADD6_W2. This winter, how likely or unlikely are you to get the following if offered?
Unweighted base: Greater Manchester Residents Survey 3: 1677, Survey 4: 1636

*Groups with a base size below 50 are not included

A third (32%) of respondents who are unlikely to get the Covid-19 vaccine say this is because they do not want the side effects associated with it, the same proportion (32%) don't trust the motivations behind it

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

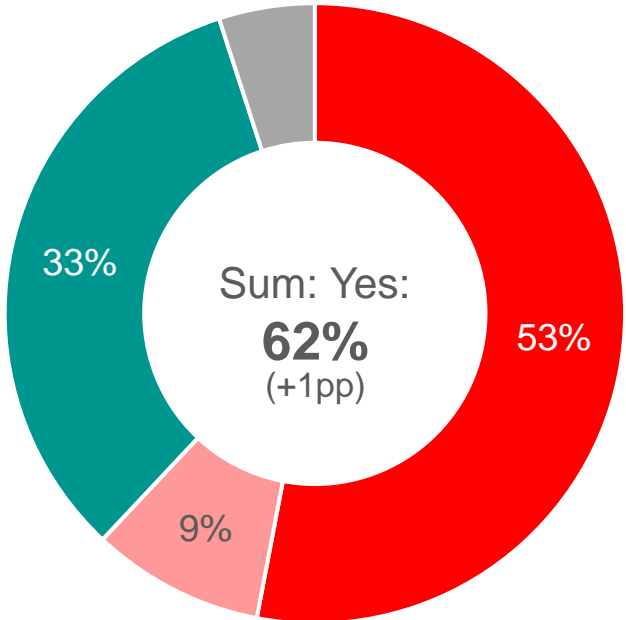


Sept (S3)	
Covid-19	Flu
40%	33%
34%	26%
26%	21%
24%	25%
19%	14%
5%	9%
3%	2%
2%	2%
2%	2%
2%	0%
1%	1%
7%	11%

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

Nearly two thirds (62%) of respondents say they **have had Covid-19 at some point**. Just over half (53%) have definitely had it, having tested positive. Those aged 25-44 (56%) are significantly more likely to have had a confirmed case

Have you ever had Covid-19?



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

Respondents more likely to have definitely had Covid-19 (vs. 53% GM average)*:

Demographics

- Female (58%)
- Those without a disability (55%)
- White respondents (55%)

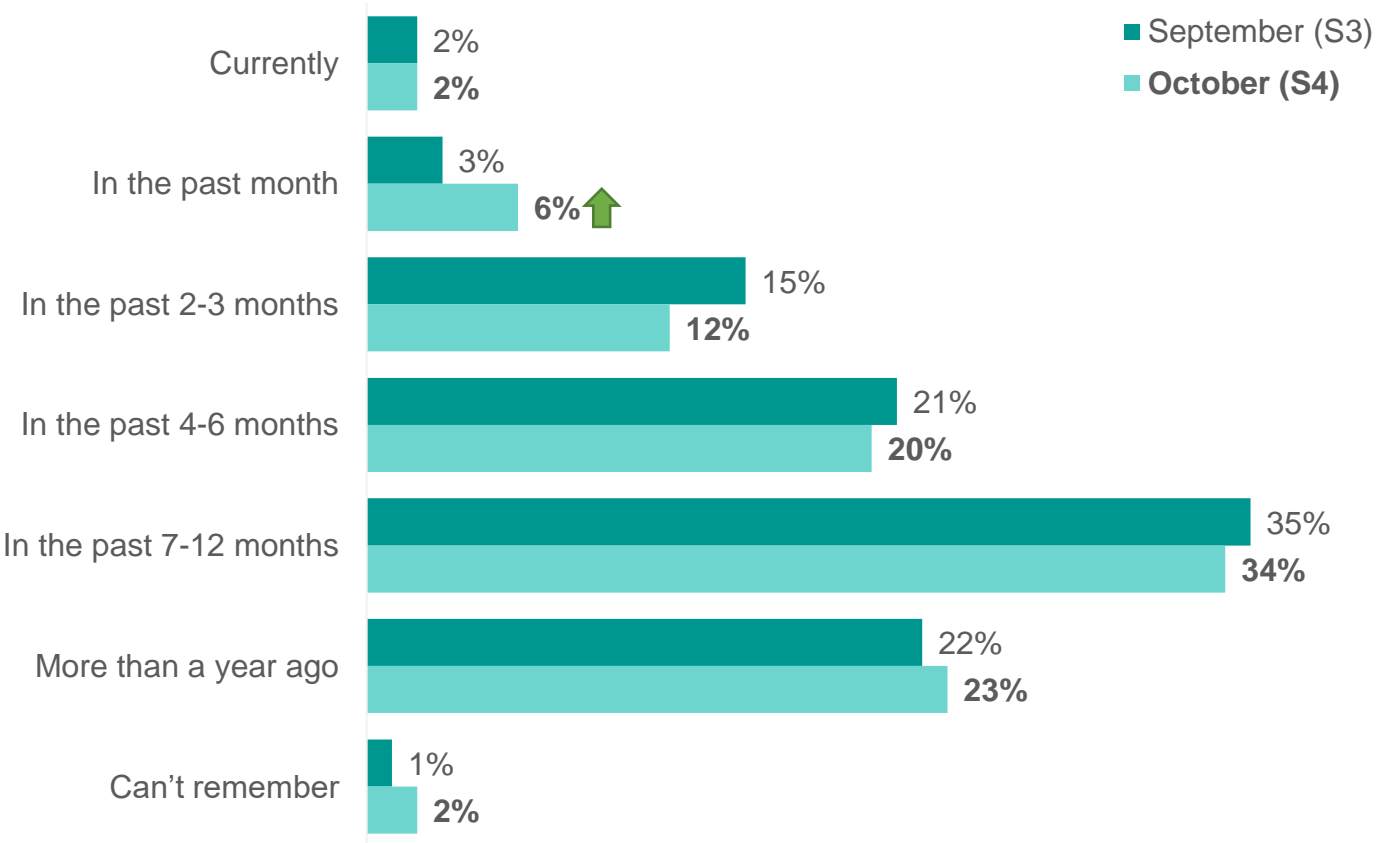
Individual and/or family circumstance

- Those earning £78,000 and above (64%)
- Those in full time employment (59%)
- Those earning above the Real Living Wage (58%)
- Those who have had to borrow more or use more credit in the last month (57%)

*Groups with a base size below 50 are not included

Of those who have **tested positive** for Covid-19, over half (57%) had their most recent positive test over 6 months ago. 6% of GM respondents have tested positive in the past month, significantly higher than September (3%)

When did you most recently have coronavirus?



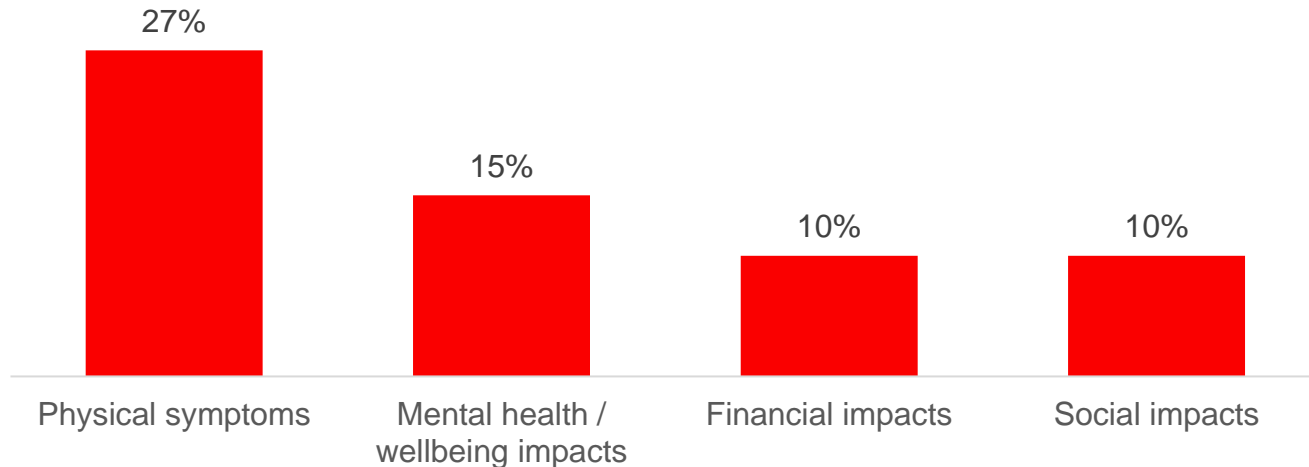
↑ ↓ Significantly higher/lower than September (Survey 3)

ADD4_W3. When did you most recently have coronavirus?
 Unweighted base: Survey 3, 954; Survey 4, 1002 (Those who have had Covid-19)

42% of those who have had Covid-19 are **experiencing some lasting symptoms**. Over a quarter (27%) of those who have had Covid-19 are experiencing physical symptoms, while 15% are experiencing mental health or wellbeing impacts

Of those who have had Covid-19, 42% are still experiencing lasting impacts...

Are you currently experiencing any of the following as a result of coronavirus? (n=968)



% who are significantly more likely to be suffering lasting effects from Covid-19 compared to GM average (42%)*:

Demographics

- Those who are Asian or Asian British (60%)
- Those who currently have caring responsibilities (55%)
- Disabled respondents (57%) including those who suffer from mental ill health (70%)

Individual and/or family circumstance

- Those who have someone in their household who has not eaten for the whole day due to lack of money (86%)
- Those who have not eaten themselves for a day due to lack of money (79%)
- Those who are worried about Covid-19 (66%)
- Those who have had to borrow money or use more credit in the last month (55%)

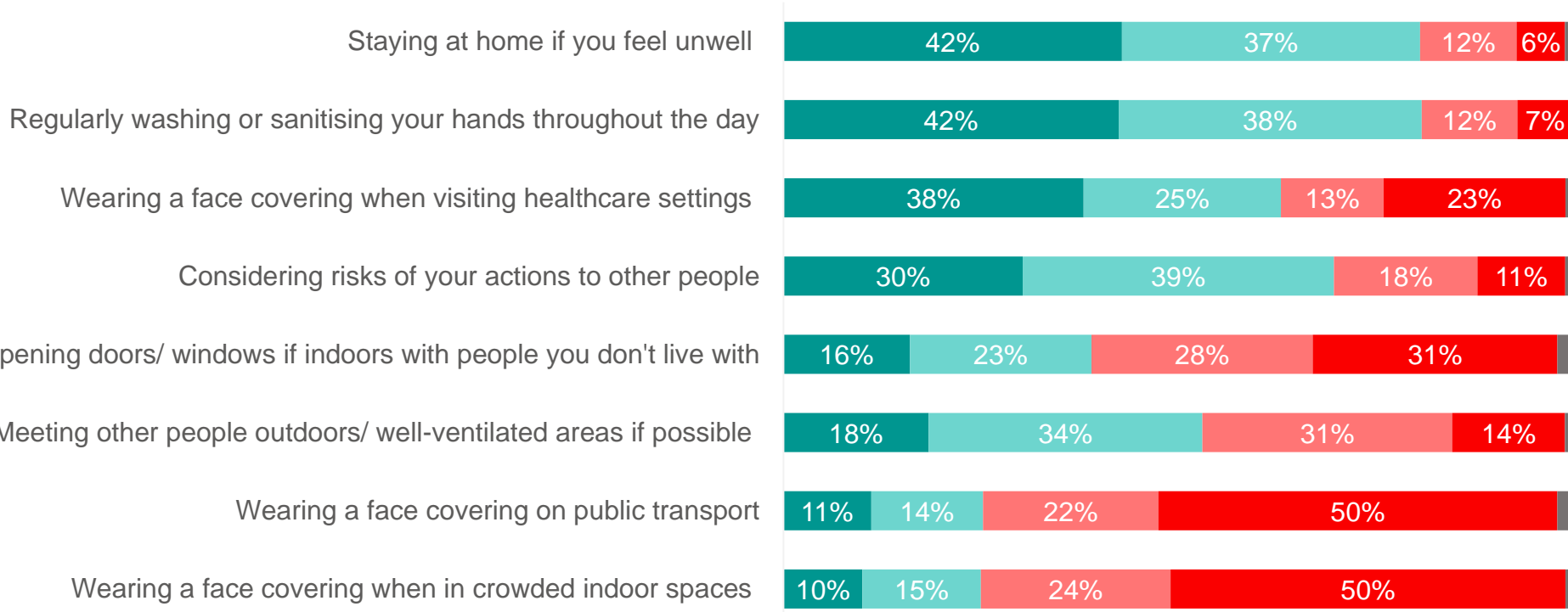
*Groups with a base size below 50 are not included

The proportion of respondents meeting other people outdoors or in well ventilated areas in any situation has significantly decreased since September (48% vs 39%), coinciding with the weather getting colder. There has been no change in the uptake of other Covid-19 safe behaviours

All or most of the time

Currently doing...

	Feb (S1)	Apr (S2)	Sept (S3)	Oct (S4)
Staying at home if you feel unwell	83%	72%	78%	79%
Regularly washing or sanitising your hands throughout the day	85%	84%	80%	80%
Wearing a face covering when visiting healthcare settings	-	80%	65%	63%
Considering risks of your actions to other people	79%	76%	67%	69%
Opening doors/ windows if indoors with people you don't live with	50%	51%	48%	39% ↓
Meeting other people outdoors/ well-ventilated areas if possible	49%	54%	54%	52%
Wearing a face covering on public transport	61%	55%	26%	25%
Wearing a face covering when in crowded indoor spaces	64%	51%	25%	25%



■ All of the time ■ Most of the time ■ Not very often ■ Not at all ■ Not sure

↑ ↓ Significantly higher/lower than September (Survey 3)

Digital inclusion – telephone sample only

Key findings	<u>page 58</u>
Overview	<u>page 59</u>
Confidence in digital services	<u>page 60</u>
Digital exclusion	<u>page 61</u>

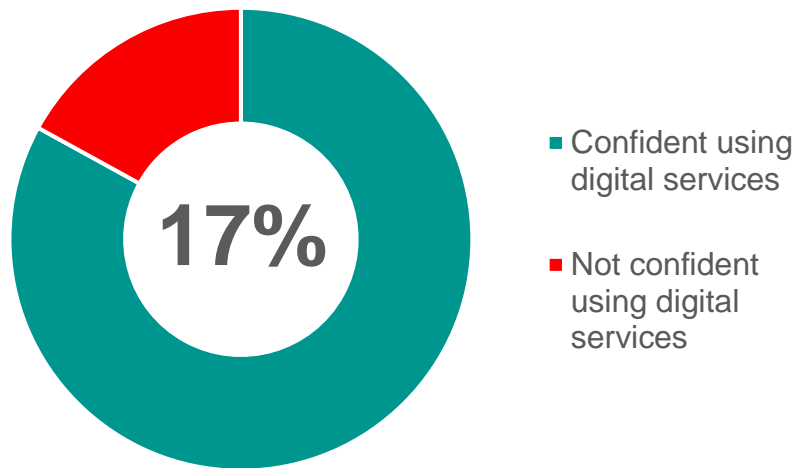
Digital service accessibility	<u>pages 62-63</u>
Current and future use	<u>page 64</u>
Online activities	<u>page 65</u>

Digital inclusion – key findings

- **CONFIDENCE**– 88% of respondents say they are confident in using digital services online. 87% say others in their household are confident in using digital services online.
- **DIGITAL EXCLUSION** – 33% of respondents in GM noted that their household experienced some form of digital exclusion.
- **PEOPLE ARE LESS LIKELY TO HAVE THE SKILLS OR SUPPORT THEY NEED** – The most common aspect of digital exclusion is a lack of support or skills needed to access the digital services online. 20% of households do not have the skills needed and 17% do not have the support needed to access digital services online most or all of the time.
- **DISABLED PEOPLE AND OLDER RESIDENTS ARE MORE LIKELY TO EXPERIENCE DIGITAL EXCLUSION** – Different groups are impacted by digital exclusion in different ways. Disabled people are more likely to be digitally excluded (51% compared to 33% across the city region), while older respondents (especially those aged 75+) are also more likely to be digitally excluded (70% compared to 33% across the city region).
- **USE OF THE INTERNET** – Respondents are more likely to report that they personally use of the internet across a range of digital services, rather than others in the household.

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

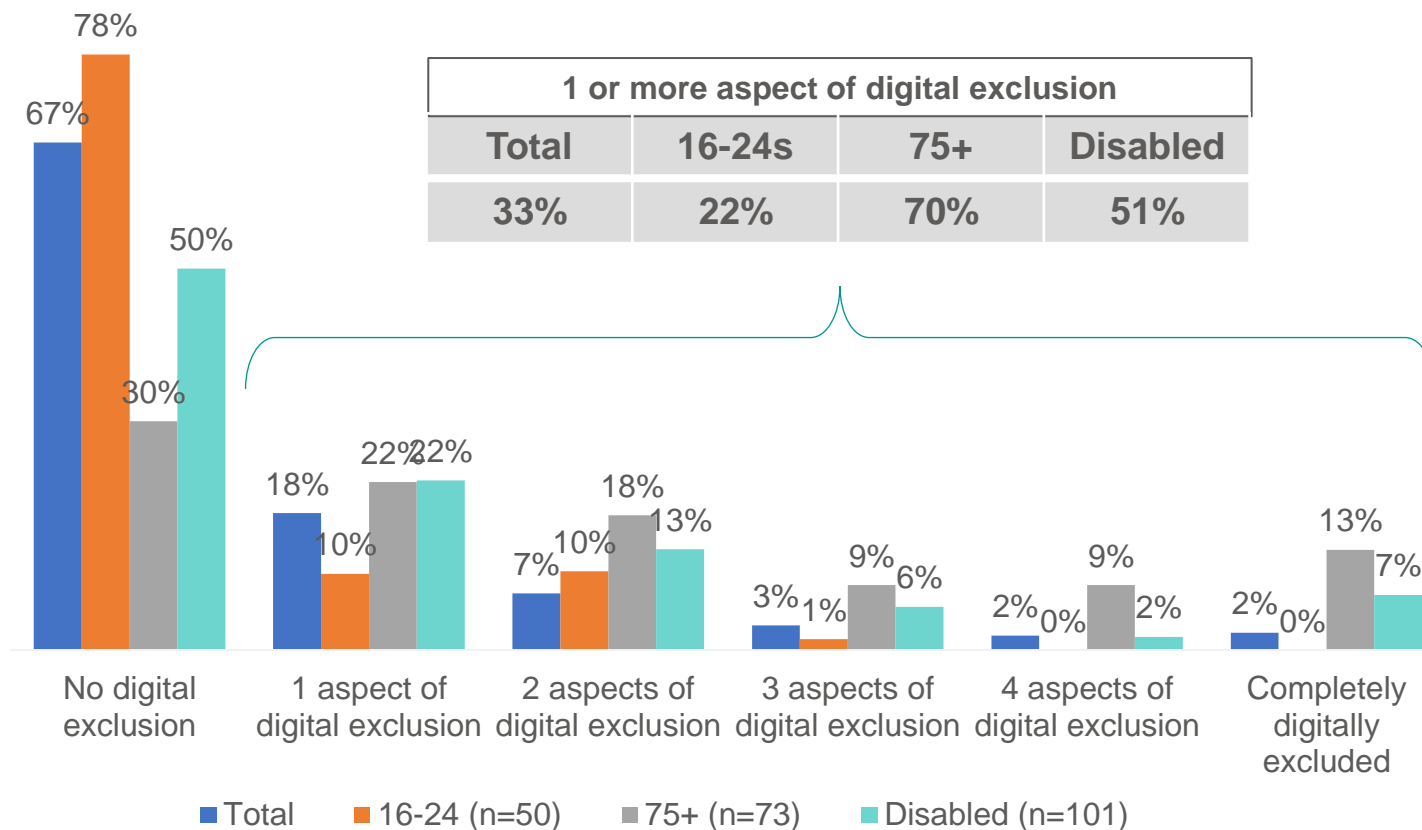
Summary: Digital Inclusion



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

Number of aspects of digital exclusion experienced*

1 or more aspect of digital exclusion			
Total	16-24s	75+	Disabled
33%	22%	70%	51%



... of households have someone (respondent or others) who is not confident in using digital services online

Fewer than one in five respondents are not confident someone in their household can use the digital services they need and want online.

Including...

6%

Aged 16-24

55%

Aged 75+

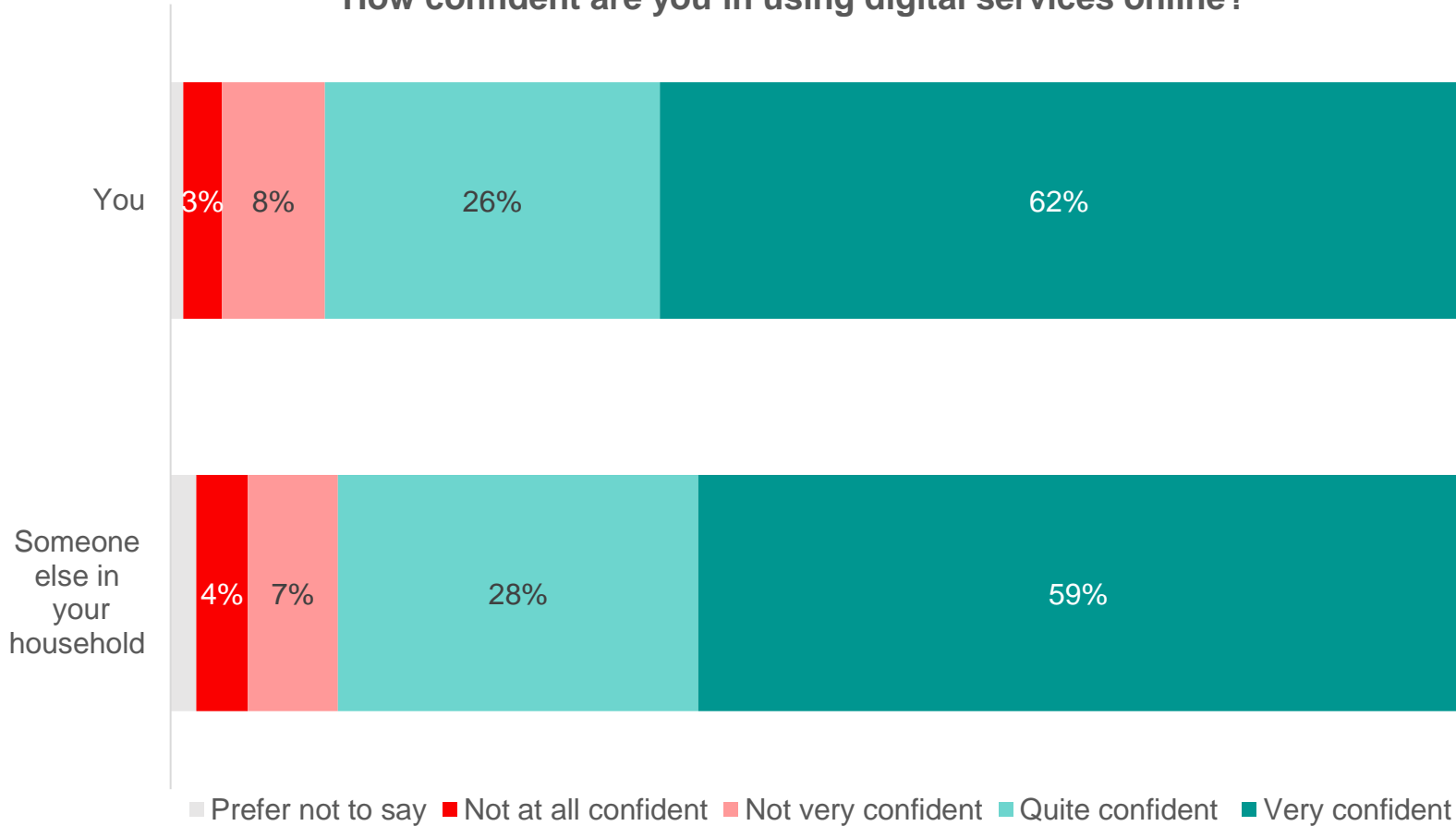
31%

Disabled respondents

Unweighted base: 505 (Telephone respondents S3+S4) *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

1 in 10 respondents (11%) and members of their household say they are **not confident using digital services online. Those more likely not to be confident are aged 75+, are disabled, or are 1 person households**

How confident are you in using digital services online?



Respondents in the Telephone sample more likely to be not very/not at all confident in using digital services online (vs. 11% GM average):

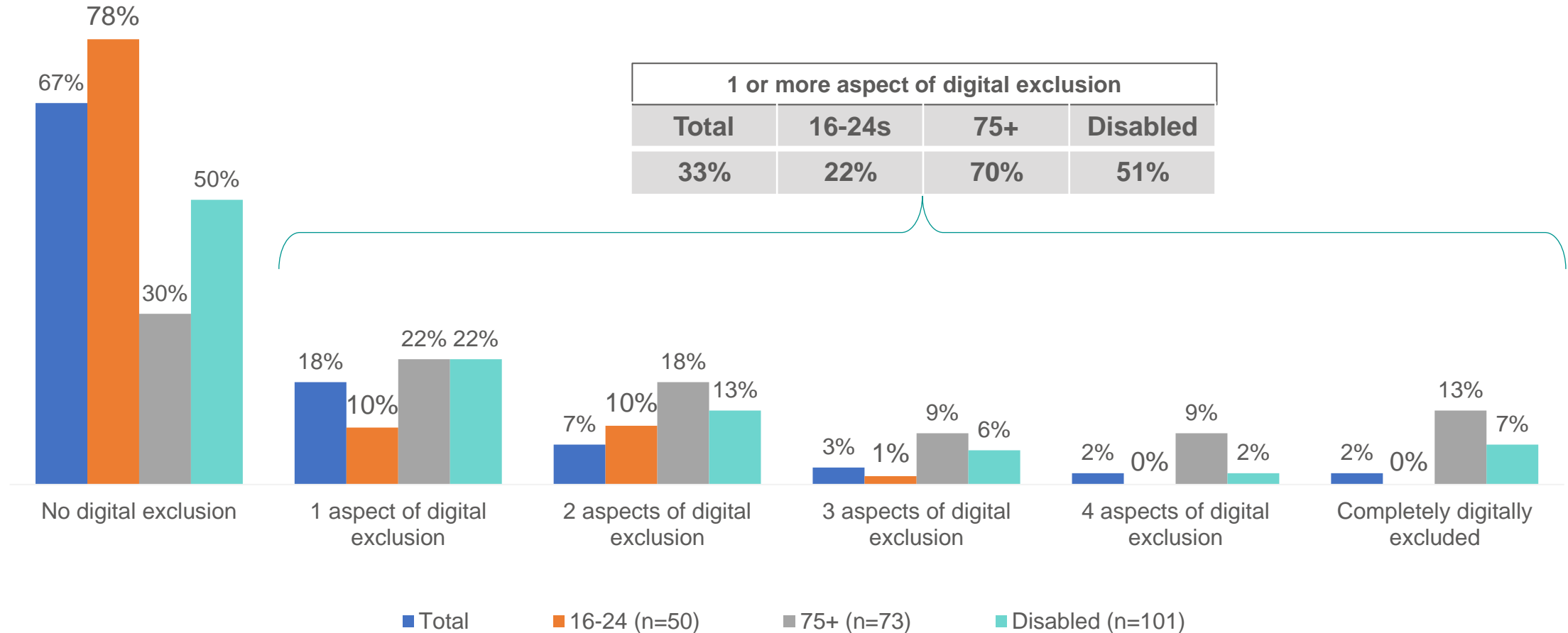
- Those aged 75+ (37%)
- Disabled respondents (21%)
- Retired respondents (32%)
- 1 person households (24%)
- Those without children under 25 (15%)

Respondents in the Telephone sample whose household is less likely to be quite confident/very confident in using digital services online (vs. 11% GM average):

- Those aged 65+ (37%)
- Retired respondents (33%)

At least one aspect of digital exclusion is experienced by a third of respondents (33%). This rises to half (50%) of disabled respondents and over two thirds (70%) of those aged over 75.

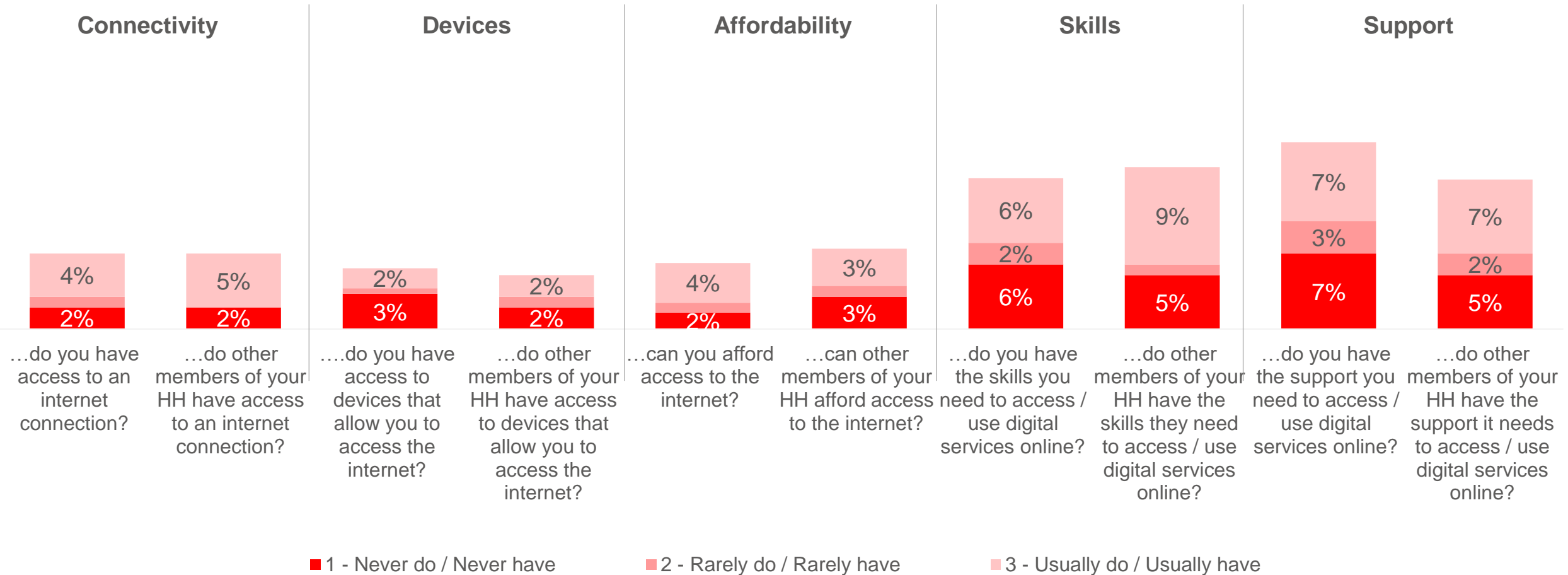
Number of aspects of digital exclusion experienced



D111. How often...? Unweighted base: 505 (Telephone respondents S3+ S4) Prefer not to say not shown. Question in S3 + S4 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

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

How often...? (Respondents reporting digital exclusion)*



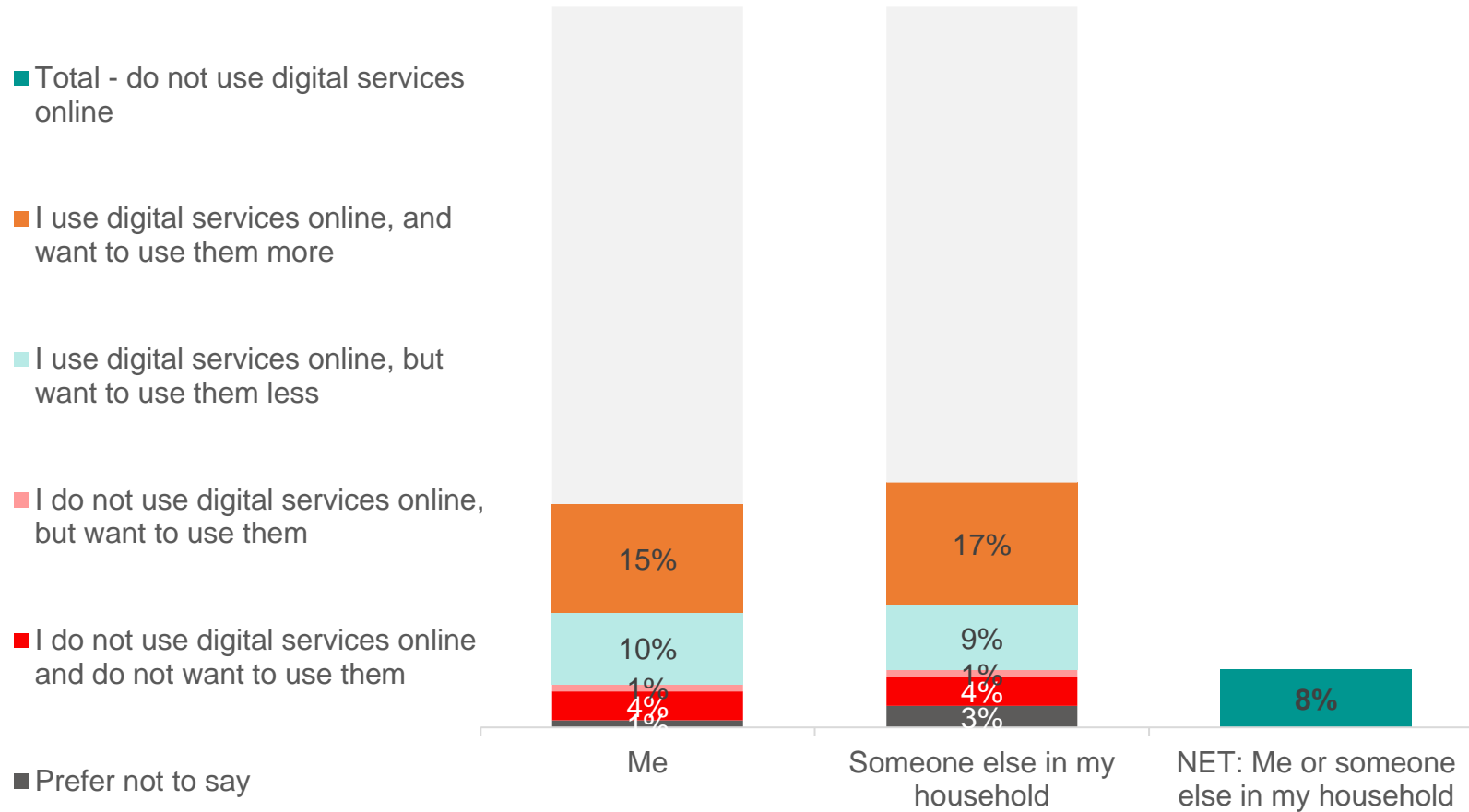
Disabled respondents and particularly those aged 75+ are far more likely **not to have access to enable them to get online all or most of the time, or the skills and support to do so**

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

	Total	Aged 16-24 (n=50)	Aged 75+ (n=73)	Disabled respondents (n=101)
...have consistent and reliable access to an internet connection at home?	9%	4%	26%	16%
...have consistent and reliable access to devices that allow access to the internet and use digital services online?	7%	1%	33%	12%
...can afford access to the internet?	9%	7%	20%	21%
...have the skills they need to access and use digital services online?	20%	12%	68%	36%
...have the support needed to access and use digital services online?	17%	10%	36%	23%

Over 1 in 10 respondents say they (15%) or someone in their household (17%) use digital services, but want to use them more

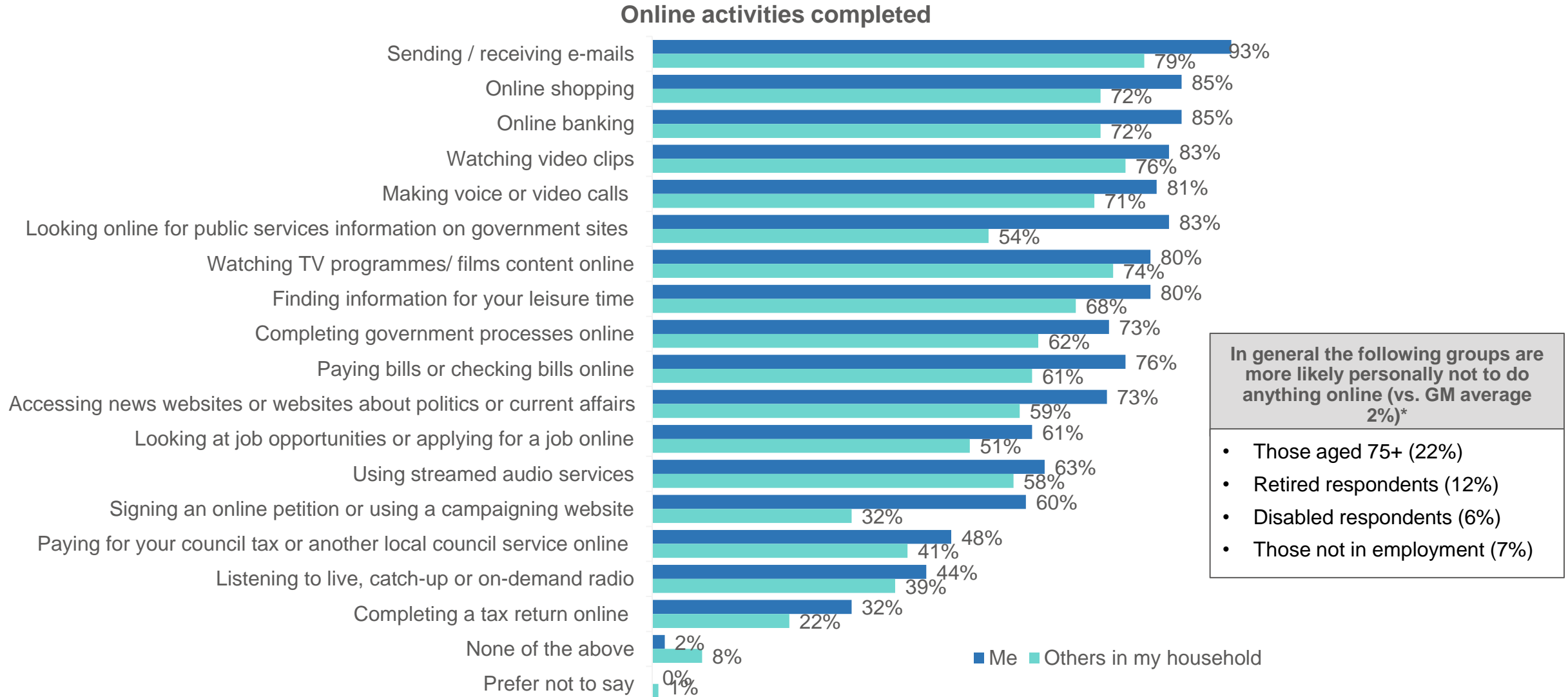
Current and intended future use of digital services online



In general the following groups are more likely to personally not use digital services online (vs. GM average 8%)*

- Those aged 75+ (39%)
- Retired people (25%)

GM respondents say that they are more likely than others in their household to personally do online activities. Those aged 75+, retired people, disabled respondents, and those not in employment are more likely than GM respondents overall to not do any activities online



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

Unweighted base: 505 (Telephone respondents S3+ S4)

Appendix: Summaries by local area

Bolton [page 67](#)

Bury [page 68](#)

Manchester [page 69](#)

Oldham [page 70](#)

Rochdale [page 71](#)

Salford [page 72](#)

Stockport [page 73](#)

Tameside [page 74](#)

Trafford [page 75](#)

Wigan [page 76](#)

Bolton

COVID-19:

28% of Bolton respondents say they are 'extremely' or very 'worried' about COVID-19 versus the GM average of 25%.

Of those Bolton respondents who have had Covid-19 and recovered, 26% are currently experiencing lasting physical symptoms. This is in line with the GM average (27%).

Around two thirds of respondents in Bolton have said they are likely to get a Covid-19 vaccine or booster (64%) or a flu vaccine (66%), in line with the GM average.

Food insecurity:

Almost 1 in 5 (19%) respondents in Bolton said it is 'often true' that they can't afford to eat balanced meals, higher than the GM average of 16%.

Over a third (34%) of residents in Bolton say someone in their household has cut the size of or skipped a meal for lack of money, this is compared to the GM average (28%).

Nearly 1 in 5 (18%) have lost weight because there wasn't enough money for food. This is similar to the GM average (17%).

Cost of living:

Nearly 4 in 5 (77%) of Bolton respondents say that over the past two weeks, they have been 'very worried' or 'somewhat worried' about the rising costs of living – slightly lower than the GM average (80%).

Over 8 in 10 (81%) of Bolton respondents have said they cost of living has increased over the last month, which is the same as the GM average of 81%.

Over half of respondents in Bolton (54%) have said they are finding it difficult to afford their energy costs. This is the same as the GM average (54%).

Nearly 1 in 5 (19%) Bolton respondents are behind on their rent or mortgage payments. This is similar to the GM average (18%).

Digital Inclusion:

17% of Bolton respondents say either they or someone else in their household cannot afford access to the internet. This is compared to the GM average (9%).

18% of Bolton respondents say either they or someone in their household is not confident in using the digital services online which they need and want. This is versus the GM average (17%).

Bury

COVID-19:

Nearly a third (30%) of Bury respondents say they are 'extremely' or 'very' worried about COVID-19 versus the GM average (25%).

Of those who have had Covid-19, 34% of residents are still experiencing some lasting effects, which is lower than the GM average (40%). 26% are experiencing lasting physical symptoms, which is in line with the GM average (27%).

Nearly 1 in 5 (18%) respondents in Bury say that they are unlikely to get either the Covid-19 vaccine/booster or flu jab this winter if offered to them. This is similar to the GM average (17%).

Food security:

Over 1 in 3 respondents in Bury (36%) have cut the size of meals, or skip meals as there hasn't been enough money for food in the last 12 months. This is in line with the GM average (35%).

Nearly 1 in 5 (18%) of respondents in Bury have lost weight because there wasn't enough money for food in the last 12 months, the same as the GM average (17%).

Over a quarter (28%) of households in Bury have cut the size of or skipped meals because there wasn't enough money for food. This is in line with the GM average.

Cost of Living:

83% of respondents in Bury have been worried about the rising costs of living in the last two weeks, which is similar to the GM average (80%).

Over 8 in 10 respondents (84%) say that their cost of living has increased over the last month, which is in line with the GM average (81%).

Over half (55%) of respondents in Bury say that it is difficult to afford their energy costs. This is higher than the GM average (54%).

Nearly a quarter (24%) of Bury respondents are behind on their rent or mortgage payments compared to the GM average of 18%.

Digital Inclusion:

7% of Bury respondents say either they or someone else in their household cannot afford access to the internet. This is in line with the GM average (9%).

Over 1 in 5 (22%) of Bury respondents say they or someone in their household is not confident in using the digital services online which they need and want. This is versus the GM average (17%).

Manchester

COVID-19:

A third (33%) of respondents in Manchester say that they are 'extremely' or 'very' worried about Covid-19. This is significantly higher than the GM average (25%).

41% of respondents in Manchester who have had Covid-19 are still experiencing lasting impacts, which is in line with the GM average (40%). 27% are experiencing lasting physical symptoms, which is the same as the GM average.

1 in 5 (20%) respondents in Manchester say that they are unlikely to get either the Covid-19 vaccine/booster or the flu jab if offered to them this winter. This is similar to the GM average (17%).

Food security:

Nearly 4 in 10 (38%) respondents have cut the size of or skipped meals because there wasn't enough money for food. This is in line with the GM average (35%).

A quarter (25%) of respondents have had someone in their household lose weight because there wasn't enough money for food. This is in line with the GM average (23%).

Over 1 in 5 (21%) respondents in Manchester say it is 'often true' that they can't afford to eat balanced meals, in comparison to the GM average (16%).

Cost of Living:

Nearly 9 in 10 (89%) of respondents in Manchester have been 'very' or 'somewhat' worried in the past two weeks about the rising costs of living. This is significantly higher than the GM average (80%).

77% of respondents in Manchester say that their cost of living has increased over the last month, which is in line with the GM average (81%).

Nearly six in ten (58%) respondents in Manchester say that it is difficult to afford their energy costs. This is similar to the GM average (54%).

17% of respondents in Manchester are behind on their rent or mortgage payments. This is in line with the GM average (18%).

Digital Inclusion:

13% of Manchester respondents say either they or someone else in their household cannot afford access to the internet. This is compared to the GM average (9%).

15% of Manchester respondents say either they or someone in their household is 'not very' or 'not at all' confident in using the digital services online which they need and want. This is versus the GM average (17%).

Oldham

COVID-19:

A fifth (20%) of respondents in Oldham are 'extremely' or 'very' worried about Covid-19. This is similar to the GM average (25%).

Of those Oldham respondents who have had Covid-19 and recovered, 29% are currently experiencing lasting physical symptoms. This is in line with the GM average (27%).

20% of respondents in Oldham are unlikely to get either the Covid-19 vaccine/booster or the flu jab if offered to them this winter. This is in line with the GM average (17%).

Food security:

16% of Oldham respondents lost weight because there wasn't enough money for food. This is in line with the GM average (23%).

13% of Oldham respondents say that it is often true that they couldn't afford to eat balanced meals, this is similar to the GM average (16%).

Over a quarter (29%) of respondents in Oldham cut the size of or skipped meals every month because there wasn't enough money for food. This is compared to the GM average (28%).

Cost of Living:

Three quarters (75%) of respondents in Oldham have worried about the rising costs of living in the past two weeks. This is in line with the GM average (80%).

80% of respondents in Oldham have had their cost of living increase over the last month, in line with the GM average (81%).

Just under half (49%) of respondents in Oldham find it difficult to afford their energy costs. This is in line with the GM average (54%).

7% of respondents in Oldham are behind on their rent or mortgage payments. This is compared to the GM average (18%).

Digital Inclusion:

14% of Oldham residents say either they or someone else in their household cannot afford access to the internet. This is versus the GM average (9%).

Nearly a quarter (24%) of Oldham residents say either they or someone in their household is not very or 'not at all' confident in using digital services online that they need and want, this is compared to the GM average (17%).

Rochdale

COVID-19:

24% of respondents in Rochdale are 'extremely' or 'very' worried about COVID-19 and its impacts. This is in line with the GM average (25%).

Of those Rochdale respondents who have had Covid-19 and recovered, 57% are currently experiencing lasting symptoms. This is significantly higher than the GM average (40%).

Under half (46%) of respondents in Rochdale are likely to get both the Covid-19 vaccine/booster and the flu jab this winter if offered. This is significantly lower than the GM average (57%).

Food security:

A sixth (15%) of respondents' households in Rochdale have worried about whether their food would run out before they got money to buy more. This is in line with the GM average (15%).

48% of respondents in Rochdale have had someone in their household cut the size of meals or skipped meals because there wasn't enough money for food in the last 12 months. This is significantly higher than the GM average (35%).

Almost a third (31%) of respondents in Rochdale have had someone in their household lose weight because there wasn't enough money for food in the last 12 months. This is significantly higher than the GM average (23%).

Cost of Living:

Over 8 in 10 (81%) respondents in Rochdale have worried about the rising costs of living in the past two weeks. This is similar to the GM average (80%).

79% of respondents in Rochdale say that their cost of living has increased over the last month. This is similar to the GM average (81%).

Two thirds (64%) of respondents in Rochdale say that it is difficult to afford their energy costs. This is significantly higher than the GM average (54%).

12% of respondents in Rochdale are behind on their rent or mortgage payments. This is compared to the 18% GM average.

Digital Inclusion:

7% of respondents in Rochdale say either they or someone else in their household cannot afford access to the internet. . This is in line with the GM average (9%).

Nearly a fifth (18%) of respondents in Rochdale say either they or someone in their household do not feel confident in using digital services online. This is in line with the GM average (17%).

Salford

COVID-19:

Nearly a fifth (19%) of respondents in Salford are 'extremely' or 'very' worried about Covid-19 and its impacts. This is similar to the GM average (25%).

Of those Salford respondents who have had Covid-19 and recovered, 24% are currently experiencing lasting physical symptoms. This is compared to the GM average (27%).

20% of respondents in Salford are unlikely to get either the Covid-19 vaccine/booster or the flu jab this winter if offered. This is the same as the GM average (17%).

Food security:

Just over 1 in 10 (12%) of respondents' households in Salford have worried about whether their food would run out before they got money to buy more. This is in line with the GM average (15%).

Over a quarter (28%) of respondents in Salford have cut the size of meals or skipped meals because there wasn't enough money for food in the last 12 months. This is the same as the GM average (28%).

19% of respondents in Salford have lost weight because there wasn't enough money for food in the last 12 months. This is similar to the GM average (17%).

Cost of Living:

8 in 10 (80%) respondents in Salford have worried about the rising costs of living in the past two weeks. This is the same as the GM average (80%).

79% of respondents in Salford say that their cost of living has increased over the last month. This is similar to the GM average (81%).

Nealy half (48%) of Salford respondents say that it is difficult to afford their energy costs. This is in comparison to the GM average (54%).

Nearly a fifth (19%) of Salford respondents say that they are behind on their rent or mortgage payments. This is in line with the GM average (18%).

Digital Inclusion:

2% of households in Salford say either they or someone else in their household cannot afford access to the internet. This is in comparison to the GM average (7%).

3% of respondents in Salford say either they or someone in their household is not confident in using digital services online. This is significantly lower than the GM average (17%).

Stockport

COVID-19:

A sixth (15%) of respondents in Stockport are 'extremely' or 'very' worried about Covid-19 and its impacts. This is significantly lower than the GM average (25%).

Of those Stockport respondents who have had Covid-19 and recovered, 27% are currently experiencing lasting physical symptoms. This is the same as the GM average (27%).

12% of respondents in Stockport are unlikely to get either the Covid-19 vaccine/booster or the flu jab this winter if offered. This is stable compared to the GM average (17%).

Food security:

Just over 1 in 10 (12%) of respondents' households in Stockport have worried about whether their food would run out before they got money to buy more. This is similar to the GM average (15%).

21% of respondents in Stockport have cut the size of meals or skipped meals because there wasn't enough money for food in the last 12 months. This is significantly lower than the GM average (28%).

12% of respondents in Stockport have lost weight because there wasn't enough money for food in the last 12 months. This is compared to the GM average (17%).

Cost of Living:

76% of respondents in Stockport have worried about the rising costs of living in the past two weeks. This is in line with the GM average (80%).

83% of respondents in Stockport say that their cost of living has increased over the last month. This is similar to the GM average (81%).

Half (50%) of respondents in Stockport say that it is difficult to afford their energy costs. This is the same as the GM average (54%).

Over a fifth (21%) of respondents in Stockport are behind on their rent or mortgage payments. This is similar to the GM average (18%).

Digital Inclusion:

17% of respondents in Stockport are not confident in using digital services online. This is the same as the GM average (17%).

5% of respondents in Stockport say either they or someone else in their household cannot afford access to the internet. This is compared to the GM average (9%).

Tameside

COVID-19:

Just under a quarter (24%) of respondents in Tameside are 'extremely' or 'very' worried about Covid-19. This is similar to the GM average of 25%.

Of those Tameside respondents who have had Covid-19 and recovered, 26% are currently experiencing lasting physical symptoms. This is similar to the GM average of 27%.

15% of respondents in Tameside are unlikely to get either the Covid-19 vaccine/booster or the flu jab this winter if offered, similar to the GM average (17%).

Food security:

16% of respondents in Tameside say it is 'often true' that their household worried whether their food would run out before they got money to buy more – in line with the GM average of 15%.

30% of Tameside respondents say they have cut the size of meals or skipped meals because there wasn't enough money for food. This is in line with the GM average (28%).

20% of Tameside respondents say they have lost weight for lack of money for food, which is in line with the GM average (17%).

Cost of Living:

81% of Tameside respondents have been 'very' or 'somewhat' worried about the rising costs of living in the past two weeks. This is similar to the GM average (80%).

9 in 10 (90%) of respondents in Tameside have had an increase in their cost of living over the last month, significantly higher than the GM average (81%).

56% of respondents in Tameside say that it is difficult for them to afford their energy costs, this is similar to the GM average (54%).

17% of respondents are behind on their rent or mortgage payments. This is in line with the GM average (18%).

Digital Inclusion:

5% of Tameside residents say either they or someone else in their household cannot afford access to the internet. This is similar to the GM average (9%).

17% of respondents in Tameside say either they or someone in their household is not confident in using digital services online, which is the same as the GM average (17%).

Trafford

COVID-19:

20% of Trafford respondents are 'extremely' or 'very' worried about Covid-19 and its impacts. This is in line with the GM average (25%).

Of those Trafford respondents who have had Covid-19 and recovered, 27% are currently experiencing lasting symptoms. This is significantly lower than the GM average (40%).

10% of respondents in Trafford say that they are unlikely to get either the Covid-19 vaccine/booster or the flu jab this winter if offered. This is significantly lower than the GM average (17%).

Food security:

9% of respondents in Trafford say that it is 'often true' that their households worried about whether their food would run out before they got money to buy more, compared to the GM average (15%).

18% of respondents in Trafford say they have cut the size of or skipped meals because there wasn't enough money for food, in the last 12 months. This is significantly lower than the GM average (28%).

7% of respondents in Trafford say they have lost weight because there wasn't enough money for food in the last 12 months. This is significantly lower than the GM average (17%).

Cost of Living:

79% of respondents in Trafford say that they have been 'very' or 'somewhat' worried about the rising costs of living within the past 2 weeks - in line with the GM average (80%).

Over 8 in 10 (84%) of respondents in Trafford say that there has been an increase in their cost of living over the last month. This is in line with the GM average 81%.

Nearly half (45%) of Trafford respondents say that it is difficult to afford their energy costs, significantly lower than the GM average (54%).

12% of respondents in Trafford are behind on their rent or mortgage payments, compared to 18% as the GM average.

Digital Inclusion:

20% of respondents say either they or someone in their household is not confident in using digital services online. This is compared to the GM average (17%).

6% of respondents in Trafford cannot afford access to the internet, compared to the GM average of 9%.

Wigan

COVID-19:

28% of respondents in Wigan are 'extremely' or 'very' worried about Covid-19 and its impacts. This is similar to the GM average (25%).

Of those Bolton respondents who have had Covid-19 and recovered, 30% are currently experiencing lasting physical symptoms. This is in line with the GM average (27%).

18% of respondents in Wigan are unlikely to get either the Covid-19 vaccine/booster or the flu jab this winter, if offered. This is the same as the GM average (17%).

Food security:

16% of Wigan respondents say that it is 'often true' that their household worried whether their food would run out before they got more money to buy more. In line with the GM average (15%).

Over a quarter (29%) of respondents in Wigan say either they or someone in their household has cut the size of meals or skipped meals because there wasn't enough money for food. This is in line with the GM average (28%).

25% of respondents in Wigan say they have lost weight because there wasn't enough money for food, significantly higher than the GM average (17%).

Cost of Living:

Three quarters (75%) of Wigan respondents say that they have been 'very' or 'somewhat' worried about the rising costs of living in the past two weeks. This is similar to the GM average (80%).

83% of respondents in Wigan say that their cost of living has increased in the past month, in line with the GM average (81%).

Nearly six in ten (57%) Wigan respondents say that it is 'very' or 'somewhat' difficult to afford their energy costs. This is similar to the GM average (54%).

A quarter (25%) of respondents are behind on their rent or mortgage payments. This is compared to the GM average (18%).

Digital Inclusion:

7% of respondents can afford access to the internet none of the time, in line with the GM average (9%).

17% of respondents say either they or someone in their household is not confident in using digital services online, the same as the GM average of 17%.

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