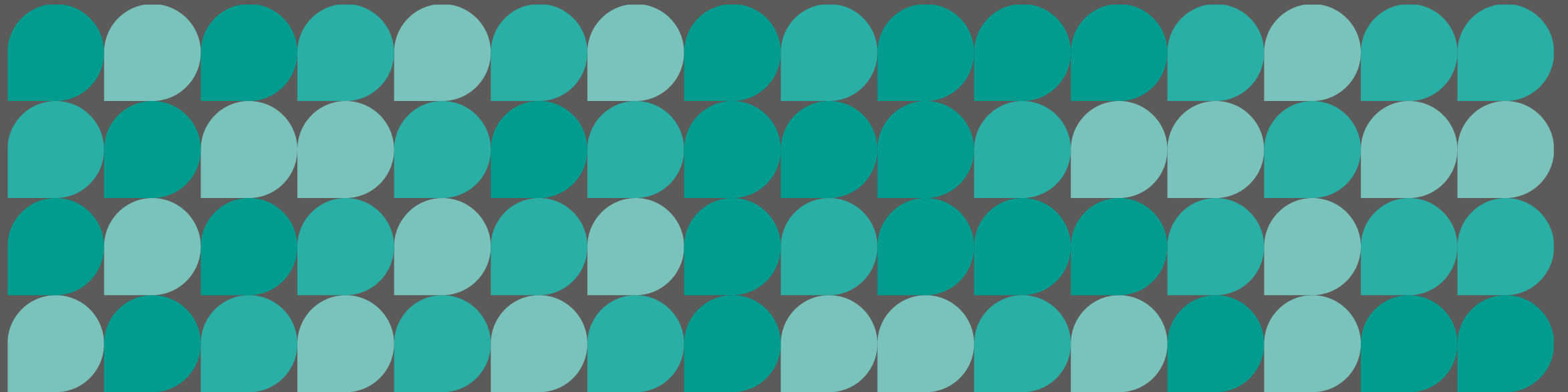


Greater Manchester Residents' Survey

Survey 9 (main report)

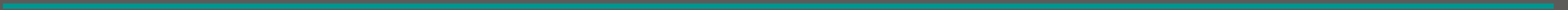
September 2023

Fieldwork conducted 4th – 18th September



Report contents

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Introduction and methodology

Background

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Methodology

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Report contents and guidance

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Background

- This report presents summary findings for a quantitative survey carried out between 4th – 18th September 2023, with a representative sample of 1,560 residents from across all ten Greater Manchester local authority areas.
 - Data from September 2023 (survey 9) is presented alongside that from similar Greater Manchester resident surveys undertaken in February 2022 (survey 1), April 2022 (survey 2), September 2022 (survey 3), November 2022 (survey 4), January 2023 (survey 5), March 2023 (survey 6), May 2023 (survey 7) and July 2023 (survey 8).
 - These surveys build on the GMCA Covid-19 Tracker conducted between December 2020 and December 2021, by also looking at some key issues for the wider Greater Manchester Strategy and its vision for a fairer, greener and more prosperous city region. More information can be found on the next slide.
 - To provide a national comparison, where available, Greater Manchester findings are presented alongside the most recent benchmarking data from relevant national surveys – for example, published figures from the Office for National Statistics (ONS)
 - In presenting Greater Manchester data, results from surveys 7, 8 and 9 have been merged where appropriate. This allows for larger and therefore more stable and robust sample sizes for analysis into specific sub-groups within the overall population over a longer period. The following approaches have been used, as felt most appropriate for the datasets in each theme:
 - health and wellbeing – data from individual surveys is shown separately
 - cost of living – data from individual surveys is shown separately, along with results from autumn 2022 (surveys 3 onwards)
 - gambling – new section, so data from survey 9 only is shown
 - local area – data from individual surveys is shown separately, except when commenting on trends for specific sub-groups or districts
 - digital inclusion – merged data for surveys 7+8+9 is used, drawing on telephone responses only
 - These surveys will continue on a regular basis, initially until spring 2024. These regular ongoing insights are designed to give stakeholders information about where to target support, communications / engagement activities and resources to improve the lives of Greater Manchester residents.
-

Methodology

- Between February 2022 and September 2023, BMG Research has undertaken nine surveys, each comprising circa 1,500 residents from across Greater Manchester. Each intended sample has included around:
 - 750 online panel respondents
 - 250 telephone respondents, and
 - 500 online ‘river sampled’ respondents (those who responded to adverts, offers and invitations to take part in the surveys)
 - The mix of using majority online sampling with a smaller telephone element was selected so that a representative and robust sample of Greater Manchester residents could be sourced within available time and budget.
 - The telephone element 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, readers should be aware that insights based on the telephone-only data are less robust because of the smaller base size; we have sought to overcome this by merging findings from multiple consecutive surveys.
 - Each survey is designed to take 15 minutes on average for respondents to complete; however, due to the emotive nature of the topics covered, interviews by telephone tend to take longer than this.
 - Quotas are set to ensure the sample broadly reflects the profile of Greater Manchester’s population 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.
-

Report contents and guidance

Report contents & guidance

- This survey 9 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 (1,560 respondents). These are presented alongside findings for surveys 1 (1,385 respondents), 2 (1,465 respondents), 3 (1,656 respondents), 4 (1,636 respondents), 5 (1,470 respondents), 6 (1,767 respondents), 7 (1,488 respondents) and 8 (1,612 respondents). See the Appendix for full details on the sample achieved in each round of fieldwork.
- Where relevant, differences in findings for specific demographic and other population characteristics compared to the Greater Manchester average 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). Significant differences are shown in charts and tables with the use of up↑ and down↓ arrows. Further detail on significance testing can be found in the appendix of this report.
- On some questions, it should be noted that responses have been filtered only to include respondents to whom the question is relevant (e.g. those in work, or with children), and so bases are lower than the full sample of 1,560 respondents in some instances. Where the case, this has been noted in the footnotes of each slide, along with the unweighted base sizes.
- The initial section provides an overview into respondents’ [personal health and wellbeing](#), followed by insights into [satisfaction with their local area](#), responses to questions on [costs of living and food security](#), then their [gambling behaviours](#), and [digital access](#).
- Finally, and with regards to a key point of language, it should be noted that this report uses the term ‘from within racially minoritised communities’ to refer to people and communities experiencing racial inequality (the term recognises that individuals have been minoritised through social processes rather than just existing as distinct minorities, although it is important to acknowledge the negative consequence of grouping all minoritised individuals together under one term, as there are significant differences both between and within these groups. ‘From within’ has been added to recognise that not all in these communities will identify as minoritised). Due to limitations of sample size, we are generally unable to report survey findings for specific ethnic groups from a single survey wave. However, as more surveys have been conducted and we are now able to merge data from multiple surveys, the larger overall sample size allows us to look at smaller demographic groups in more detail. These differences, where currently possible, are included throughout this report.

Health and wellbeing

Overview and context

[pages 8](#)

Health and wellbeing key findings

[pages 9-10](#)

Health and wellbeing detailed findings

[page 11 - 21](#)



Health and wellbeing – context

This wave of the Greater Manchester Residents' Survey includes, for the fourth time, all four measures of personal wellbeing commonly asked in national surveys. Due to survey time constraints, previous waves had asked about two of these measures – life satisfaction and levels of anxiety. Changes across the survey have allowed us to make capacity for exploring wellbeing in broader terms.

The wellbeing questions used in this survey are replicated from the [Annual Population Survey](#). These are nationally recognised metrics, used in their current form since 2011. As this is now the fourth time that we have asked all four questions, findings in relation to wellbeing are becoming more robust at different spatial levels and for different sub-groups.

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

In this wave, for the first time, we have added a number of questions relating to the experience of NHS services. Along with this, questions relating to poverty proofing have been included for the first time. These latter questions relate to the ways in which respondents' financial situations may be having an impact on their ability to access NHS health and social care services.

Benchmarks to set the Greater Manchester figures in a wider Great Britain or United Kingdom context can be difficult in this thematic area, but some details are drawn from the National Health Service (NHS) England Perception Tracker (conducted by Kantar on behalf of NHSE from January 2022 – current). See the Appendix for brief details on the difficulty of making direct comparisons to Annual Population Survey benchmarks on population wellbeing.

Health and wellbeing– key findings (1)

All wellbeing measures are broadly in line with the positions reported in May and July, with no significant movement.

WELLBEING

- 3 in 5 (63%) Greater Manchester respondents say they have ‘very high’ or ‘high’ life satisfaction
- 2 in 5 (40%) respondents said they were highly anxious, when asked how anxious they felt yesterday. A quarter (25%) said they were experiencing very low anxiety
- 3 in 5 (62%) said that they felt very high or high levels of happiness when asked how happy they felt yesterday. 15% said that they felt unhappy
- Around 2 in 3 (65%) respondents express a high level of agreement that the things they do in their life are worthwhile. Conversely, 13% say that they do not feel that the things they do in their life are worthwhile

MANAGING YOUR OWN HEALTH

- 9 in 10 (92%) respondents agree that they are involved in decisions about their own health
- 8 in 10 (84%) agree that they can look after their own health
- 8 in 10 (79%) agree that they know enough about their health
- 7 in 10 (74%) agree that they can get the right help if they need it – while 1 in 10 (10%) disagree
- These results combine to give an overall Health Confidence score for Greater Manchester of 71.4 – representing a ‘moderate’ level of health confidence

DISABLED RESPONDENTS

- Disabled respondents are significantly more likely to respond negatively when asked about their health and wellbeing – reporting a lower health confidence (score: 62.6, compared to 71.4 for all respondents)
 - Generally, they feel more unhappy and anxious, and feel less able to manage their own health
-

Health and wellbeing– key findings (2)

ACCESS TO NHS SERVICES

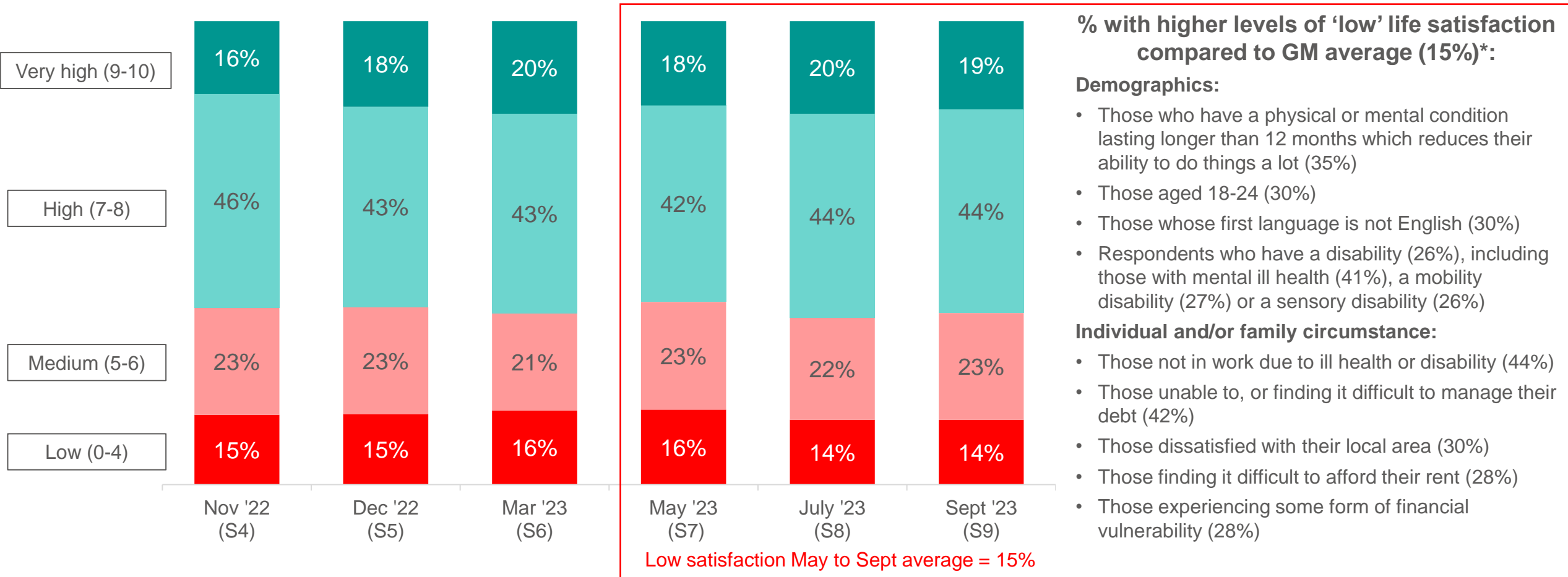
- 7 in 10 respondents (69%) feel confident that they would be able to easily find the right NHS service if they needed it
- Around 6 in 10 (59%) feel confident that they would be seen face-to-face by a doctor if they required it
- Just under half (48%) feel confident that they would be able to get a timely appointment at their local surgery if unwell
- Around 4 in 10 feel confident that an ambulance would arrive quickly if they called 999 (40%) or that they would be seen quickly in A&E if they needed treatment (36%)
- Those aged 45-64 and respondents facing some form of financial vulnerability are less likely to be confident in all aspects

PERSONAL FINANCES AND ACCESS TO HEALTH AND SOCIAL CARE SERVICES

- Around a quarter (23%) of respondents have at some point been unable to access an NHS health and social care service due to cost implications (such as inconvenient appointment times – the most common reason, given by 48% of those who have experienced this – or time away from work, distance from their house, parking)
 - A similar proportion (25%) agree that their household income impacts their ability to access NHS services. Though approaching half (46%) say that their income does not impact on their ability to access services
 - 2 in 5 (40%) say cost implications are considered by NHS staff at least sometimes when scheduling appointments (though only 15% think this happens every time or often)
 - Over 4 in 10 (44%) agree that NHS health and social care professionals have a responsibility to assist patients with financial hardships. Around a quarter (26%), however, do not agree with this
 - Views on whether NHS health and social care services in Greater Manchester have become more accessible for those facing financial hardships over the past two years are divided – 24% of respondents, while 27% disagree
 - Over 7 in 10 (72%) respondents were previously aware of at least one NHS schemes of financial assistance from a list provided
 - 1 in 10 (9%) respondents have raised financial concerns with an NHS professional, with 53% of these doing so with their GP
-

The proportion of respondents who say they have very high life satisfaction has shown little movement since November.

How satisfied are you with your life nowadays?

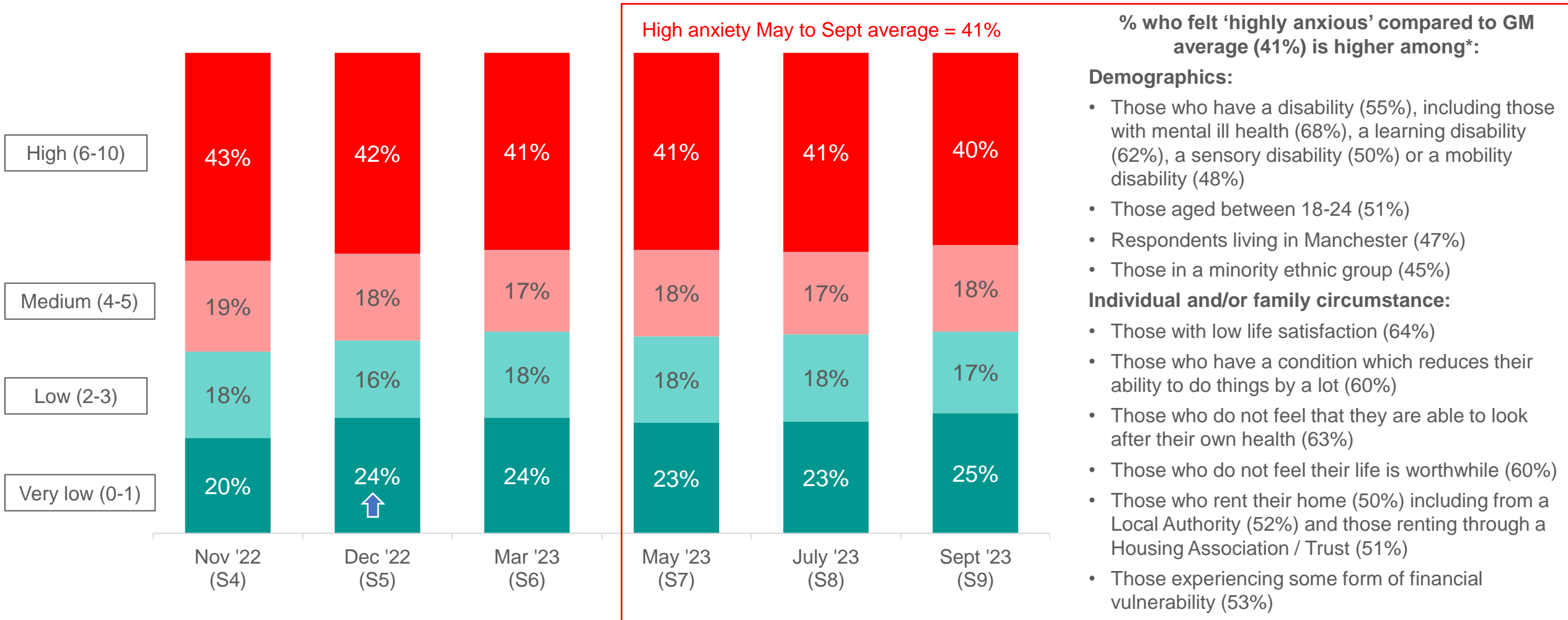


* Subgroup analysis uses merged data from S7-9

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

Two fifths (40%) of respondents report feeling a **high level of anxiety**. This has stayed relatively consistent since November.

How anxious did you feel yesterday?



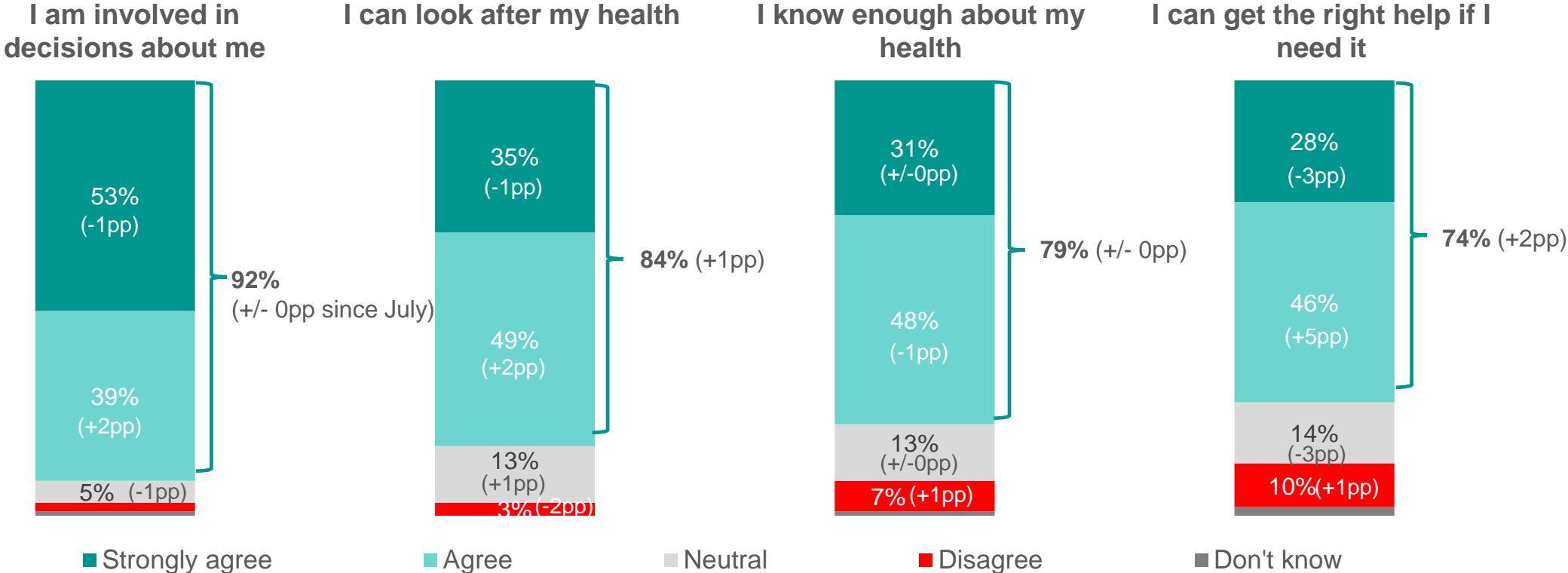
↑ ↓ Significantly higher/lower than the Greater Manchester Residents' Survey before

* Subgroup analysis uses merged data from S7-9

A2. Where 0 is "not at all" and 10 is "completely"...

Unweighted base: Greater Manchester Residents Survey 4, 1636; Survey 5, 1470; Survey 6, 1767, Survey 7, 1488, Survey 8, 1612, Survey 9, 1560

When it comes to **managing their own health**, 9 in 10 (92%) respondents agree they are involved in decisions about themselves, while 84% agree that they can look after their health (84%). There has been little or no change in these measures since July



Figures in brackets show change since July (S8)

S14. To what extent do you agree or disagree with the following statements?
 Unweighted base: All respondents Survey 9, 1560 (All responses)

2 in 3 (65%) respondents feel that the things they do in their life are worthwhile; slightly fewer (62%) are happy, overall, with their lives

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

How happy did you feel yesterday?

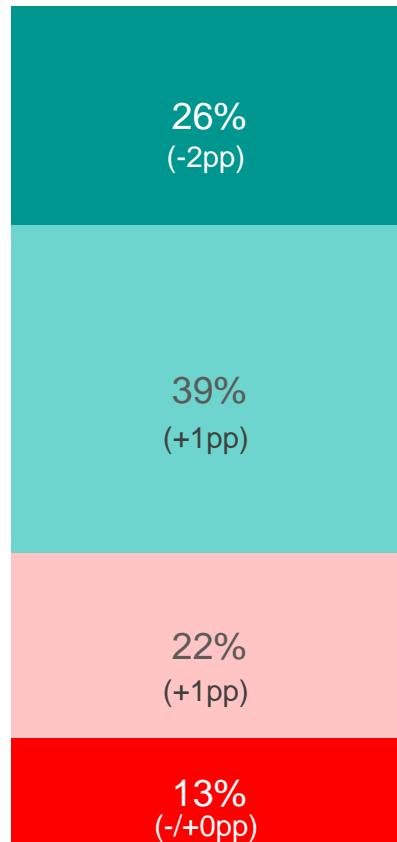
% who felt that their life was not at all worthwhile compared to GM average (13%):

Demographics:

- Those who have a disability (26%), including those with mental ill health (39%), a mobility disability (22%) or a sensory disability (24%)
- Those aged 16-24 (17%)

Individual and/or family circumstance:

- Those who earn up to £10,399 (25%)



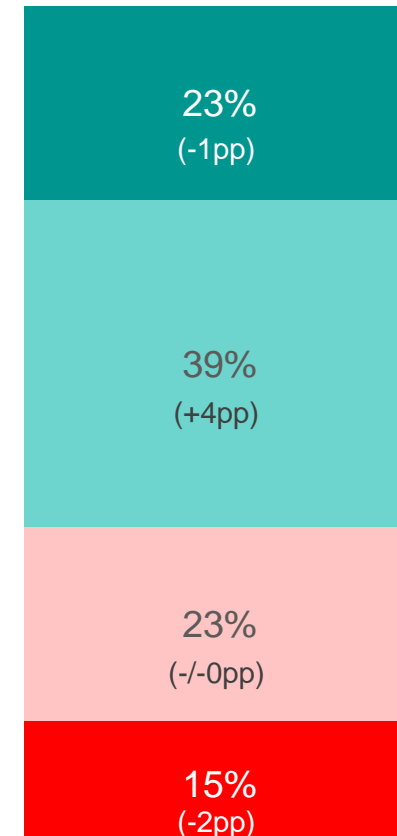
September '23 (S9)

Very high (9-10)

High (7-8)

Medium (5-6)

Low (0-4)



September '23 (S9)

% who did not feel at all happy yesterday, compared to the GM average (16%):

Demographics:

- Those who have a disability (28%), including those with mental ill health (40%), a sensory disability (27%) or a mobility disability (27%)
- Those aged 18-24 (21%)

Individual and/or family circumstance:

- Those who have high anxiety (28%)

* Subgroup analysis uses merged data from S7-9

Health confidence score

This is the third occasion where health management questions have been analysed, drawing on a methodology used in academia, to calculate an overall Health Confidence Score. The score of 71.4 out of 100 represents a 'moderate' level of health confidence and shows very little change over the three surveys.

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



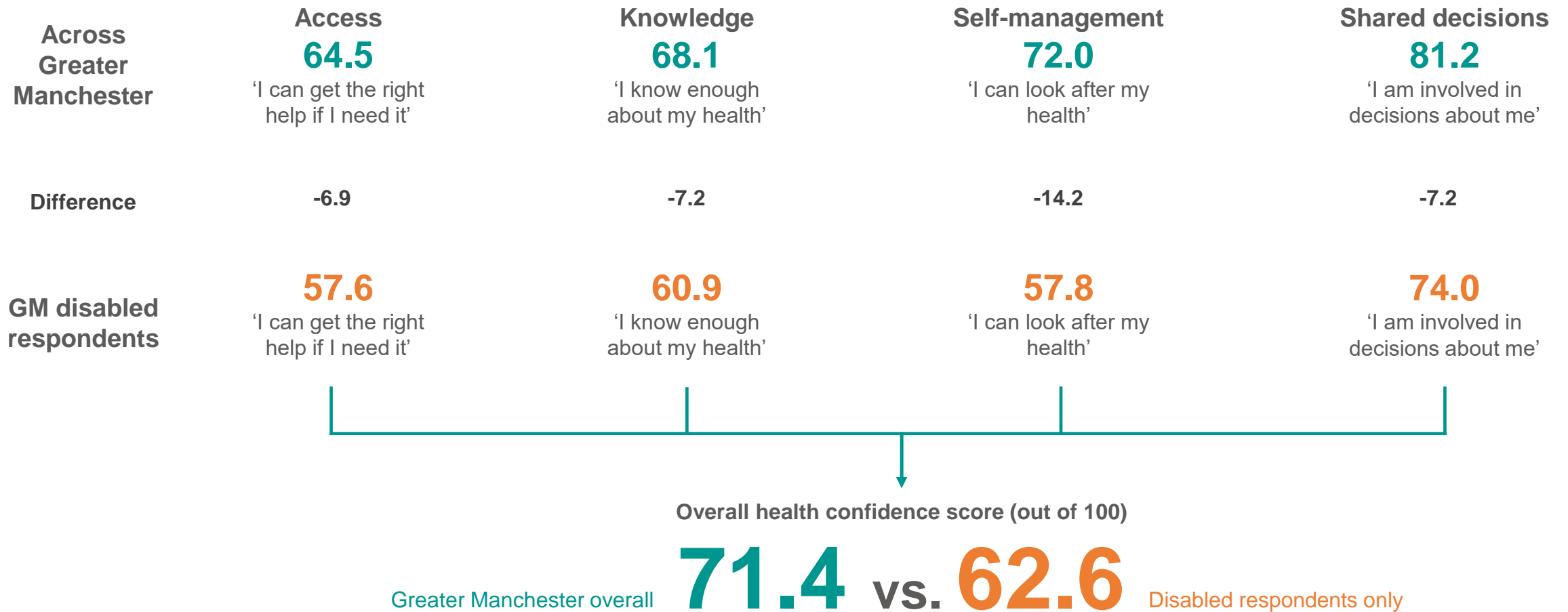
On a 0-100 scale, these thresholds are given the following interpretations:

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

71.4

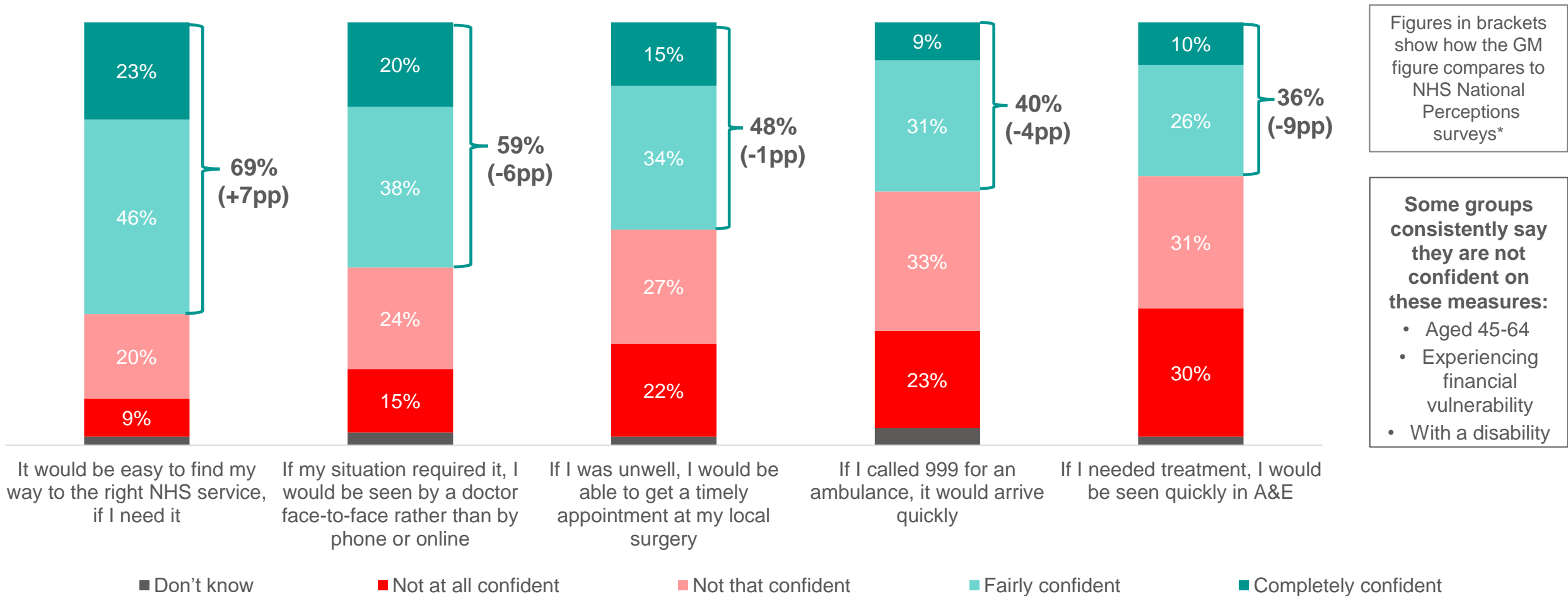
-0.4 points lower than in July 2023
+1 point higher than in May 2023

For disabled respondents, the overall **health confidence** score and the scores for each factor contributing to it are lower than for the population as a whole; there is a particular difference in feelings of being able to 'look after my health'.



7 in 10 (69%) are confident it would be easy for them to find the right **NHS service** if they needed it, while 6 in 10 (59%) are confident they would be seen by a doctor face-to-face, if required

Access to NHS services



Figures in brackets show how the GM figure compares to NHS National Perceptions surveys*

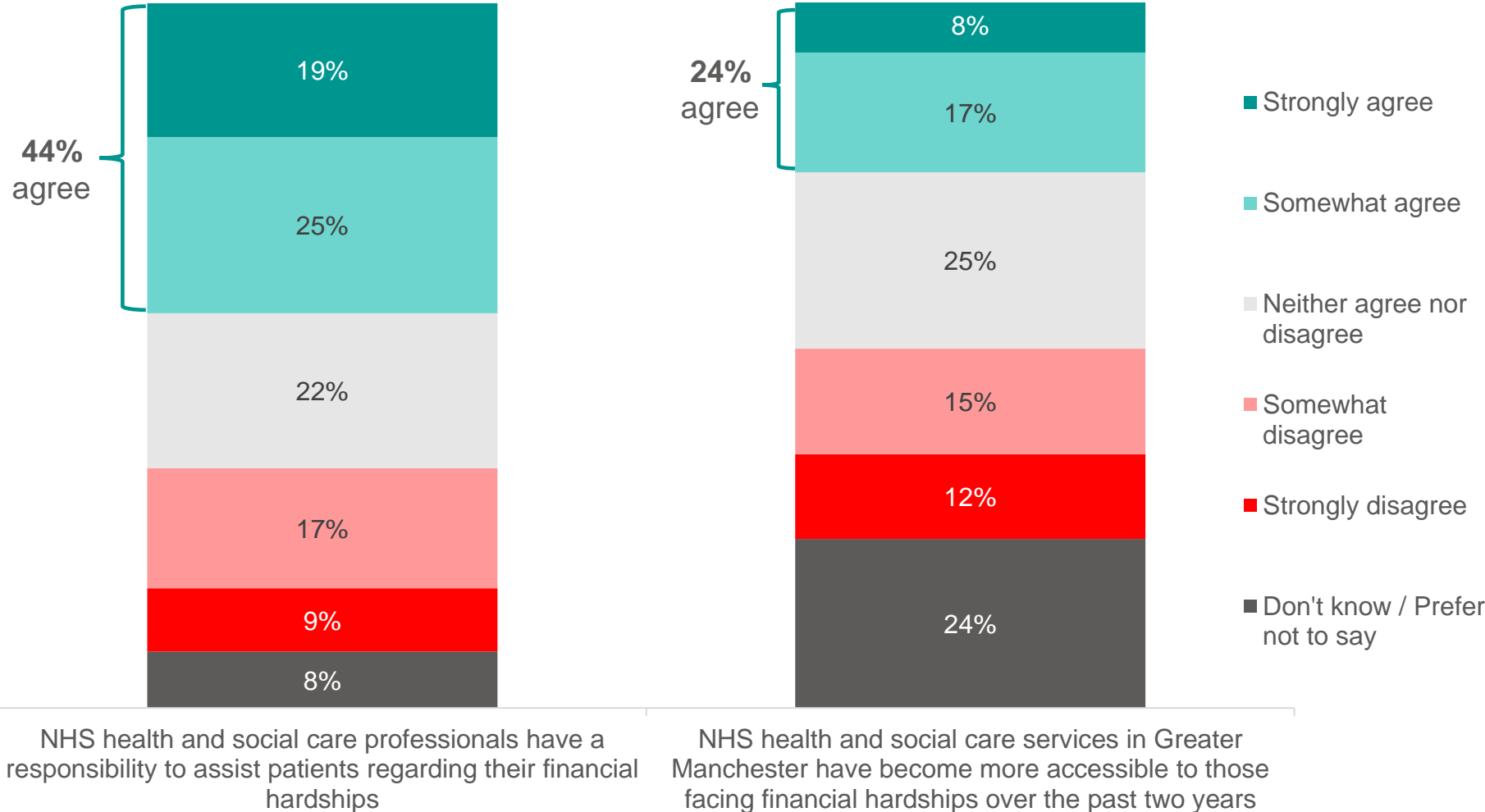
Some groups consistently say they are not confident on these measures:

- Aged 45-64
- Experiencing financial vulnerability
- With a disability

Figures in brackets show difference in confidence from benchmarking data obtained from NHS England Perception Tracker*

NHS1. How confident are you about the following aspects of service from the NHS? Unweighted base: Survey 9, 1560. This question features in the Residents' Survey for the first time.
 *Benchmarking data presented for latest period (July 2023) from NHS England Perceptions Tracker (conducted as an online survey by Kantar)

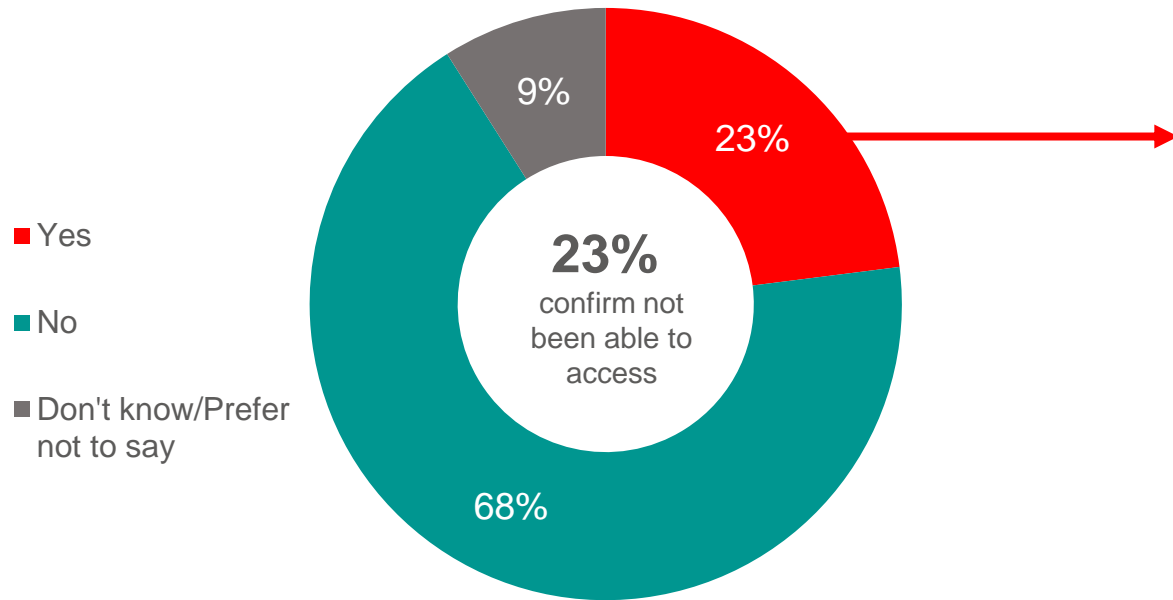
Over 4 in 10 (44%) feel that NHS health and social care professionals have a responsibility to assist patients regarding their financial hardships. Views on whether NHS health and social care services in Greater Manchester have become more accessible for those facing financial hardships over the past two years are divided – 24% of respondents agree, while 27% disagree



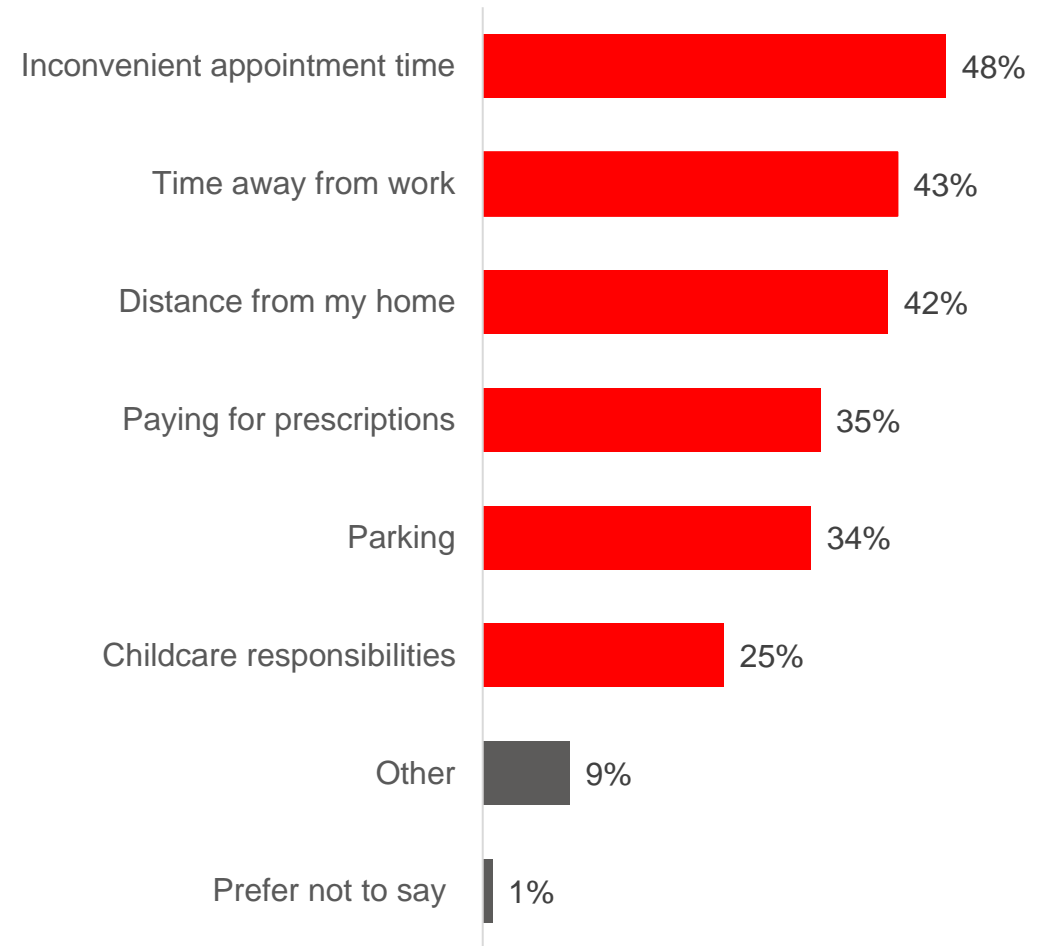
P3. Have you ever not accessed an NHS health and social care service or amenity due to cost implications (such as time away from work, distance from your house, childcare responsibilities, parking, etc)? P1. To What extent do you agree or disagree with the following statements...Unweighted base: Survey 9, 1560

Around a quarter of respondents (23%) have not accessed an NHS health or social care service at some point due to cost implications. 48% of these have not been able to access a service due to an inconvenient appointment time

Have you ever not accessed an NHS health and social care service or amenity due to a cost implication?



Reasons for not being able to access a health or social care service



The following groups are more likely to have not accessed a service due to cost:

- 34% in financially vulnerable situations
- 32% with a disability
- 31% aged 25-34

Similarly, 25% agree that their household income affects their ability to access health and care services

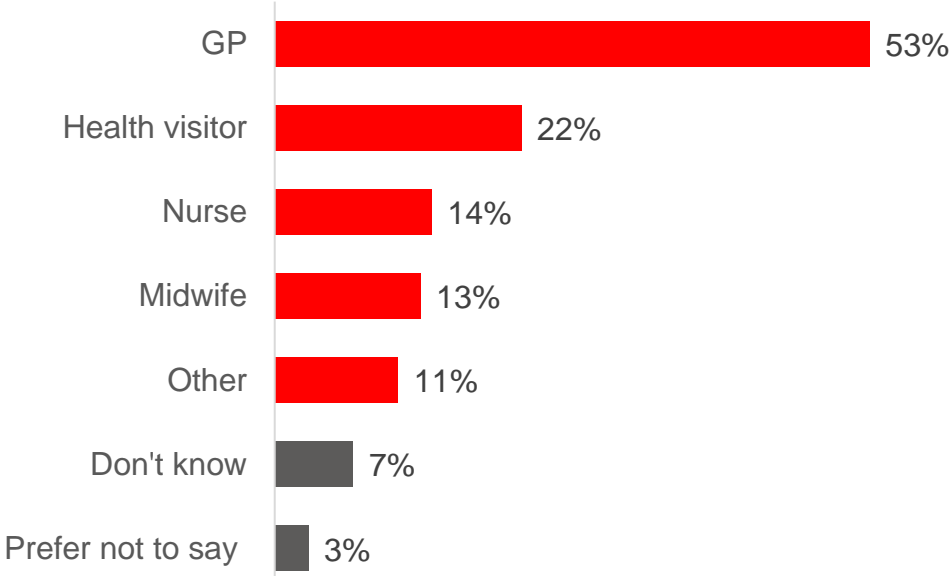
9% of respondents have at some point raised concerns about their household's financial situation with an NHS health and social care professional. Of these, over half (53%) raised it with their GP. While almost three quarters (72%) of respondents are aware of any NHS financial support available, fewer than 1 in 5 (17%) are aware of funding for travel to appointments.

9% yes 86% no

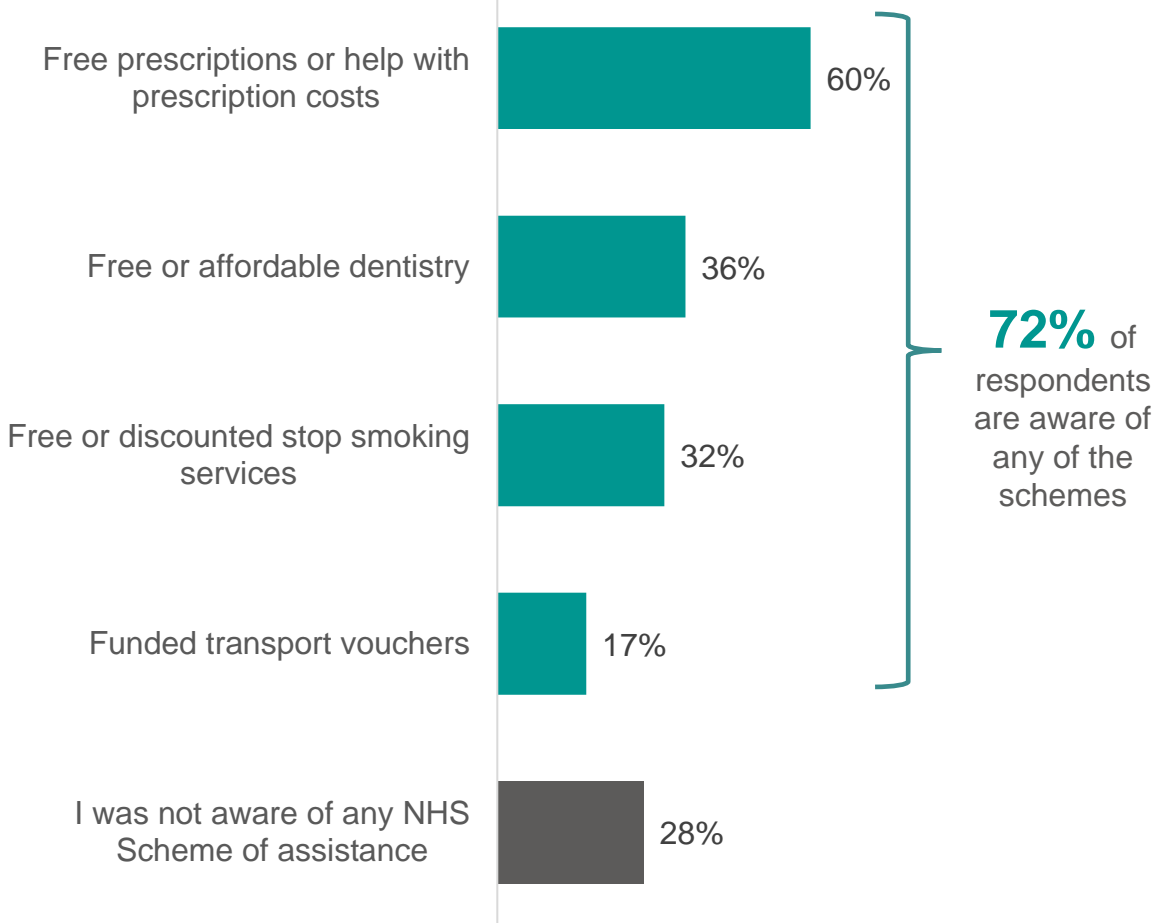
...on whether they have raised concerns about their household's financial situation with an NHS health and social care professional



Those who say yes, say they raised their concerns with a...



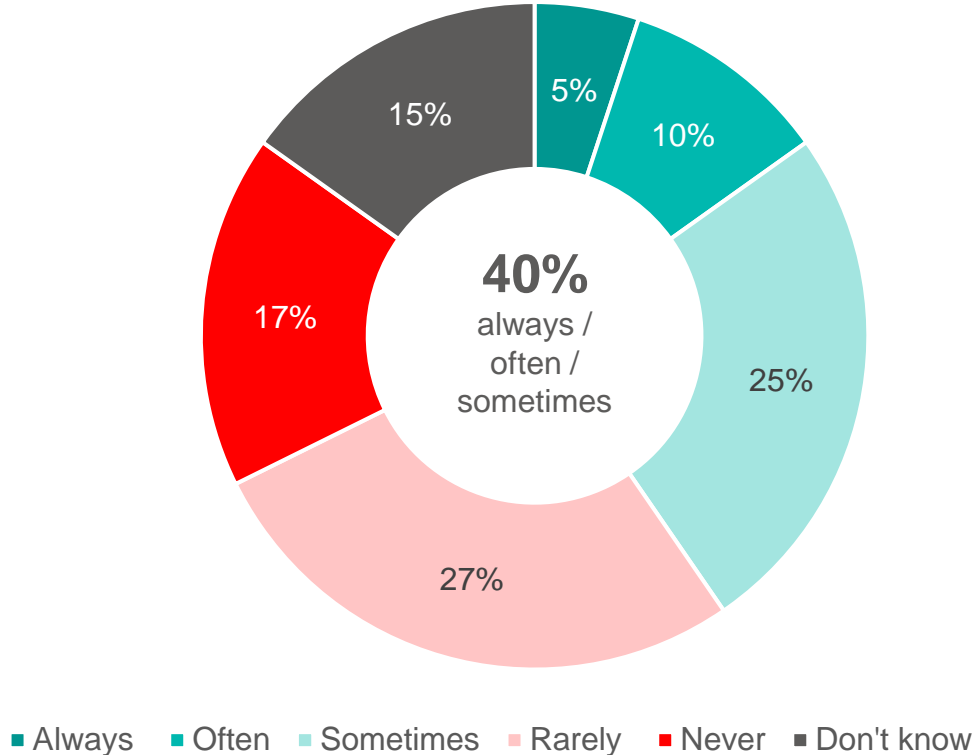
Awareness of NHS Schemes or assistance (among all respondents)



P5. Have you ever raised concerns about your household's financial situation with an NHS health and social care professional? P6. Who did you raise your financial concerns with? P7. The following are NHS schemes or assistance that Greater Manchester residents may be able to access to get support with health and social care costs. Before today, which of these, were you aware of? Unweighted base: 1560 (All respondents); 115 (All who have raised concerns about their financial situation)

2 in 5 (40%) say cost implication are considered by NHS staff at least sometimes when scheduling appointments (though only 15% say this happens every time or often)

Are cost implications taken into consideration by NHS health and social care professionals when appointments are scheduled?



Your local area

Overview and context

[page 23](#)

Your local area key findings

[pages 24-25](#)

Your local area detailed findings

[pages 26-33](#)



Your local area – context

The September 2023 Residents' Survey includes, for the fourth time, a number of questions to explore residents' experiences of their local area, along with their sense of community, local pride and belonging. In this wave, the survey continues to consolidate our understanding. The questions have been included to explore how this kind of data may be able to inform local monitoring and evaluation of pride in place and life chances interventions (including through the UK Shared Prosperity Fund to invest and empower local communities), as one part of a wider approach.

As questions on local area have been asked across multiple surveys, we have tracked data over time. We have also merged data where possible, meaning that the sample is larger and more robust and greater analysis of sub-groups is possible. Questions within this section use a merged sample from the results from surveys 7, 8 and 9.

Benchmarks, where included, reflect October 2021-September 2022 England figures from the DCMS' Community Life Survey*. The DCMS survey is conducted through self-completion, either online or on a paper questionnaire. This is comparable with the Residents' Survey, which is either self-conducted online or through a telephone interview.

* Comparisons are from the October 2021-September 2022 England figures from the DCMS Community Life Survey 2021/22, full results online [here](#). Wider details on the DCMS survey methodology are available [here](#).

Your local area – key findings (1)

OVERALL SATISFACTION WITH LOCAL AREA

- Three quarters (73%) of respondents are satisfied with their local area as a place to live, including a quarter (25%) very satisfied.
 - The proportions satisfied and very satisfied have both fallen slightly since July (was 75% and 27%).
 - National figures in the Community Life Survey report similar overall satisfaction (76%) but higher 'very satisfied' (30%)
- Three quarters (76%) of respondents agree they would recommend their local area as a place to live, but 1 in 5 (21%) say that they would not. These figures have remained stable since July, despite overall satisfaction falling slightly

SATISFACTION WITH SERVICES

- For transport specifically, the highest level of satisfaction is with the availability of public transport (63%), followed by bus services (54%) and Metrolink (47%)
 - More people are satisfied than they were in July with the Metrolink (47% cf. 44%), cycle lanes and routes (34% cf. 31%) and the conditions of the roads (33% cf. 31%)
- 58% are satisfied with health and care services in Greater Manchester - a fall from July, where 62% were satisfied.
- Those dissatisfied with cultural facilities in their local area have increased from 28% in July to 33% in September.
- Whilst levels of satisfaction with schools and colleges among parents with children in education have remained the same (70%), satisfaction with early years and primary education have fallen since July (early years - 75%, was 78%; primary 29%, was 71%)

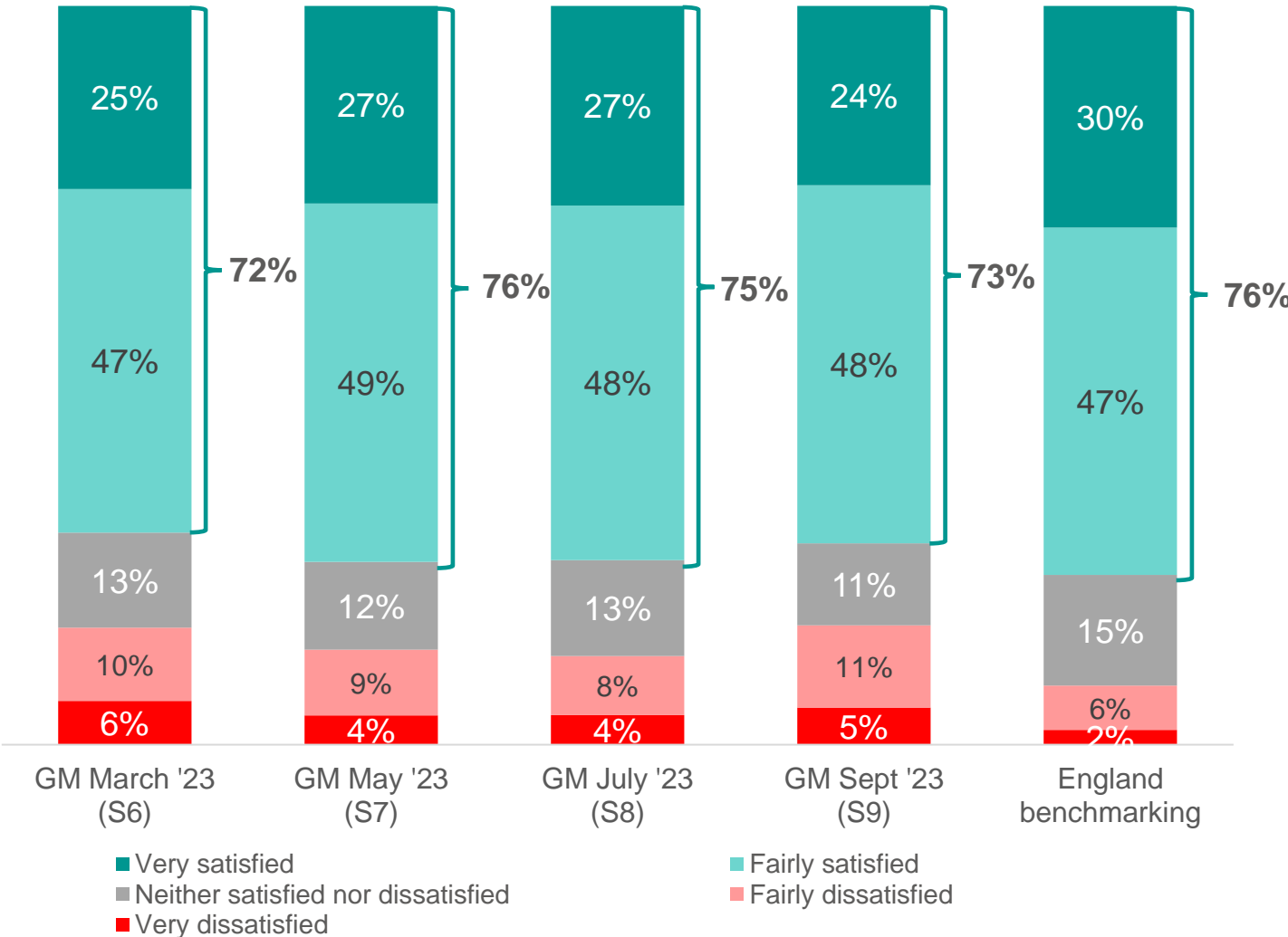
Your local area – key findings (2)

NEIGHBOURHOOD AND COMMUNITY

- Around 2 in 3 respondents are proud of their local area (68%) and agree it is a place where people look out for each other (68%). Just over half (55%) agree that their local area is well maintained
- 72% of respondents agree that their local area is a place where people from different backgrounds get on well together, a fall since July (was 77%) and lower than the figure for the country as a whole (84%)

Three quarters (73%) of respondents say that they are **satisfied with their local area** as a place to live. This is similar to the England average (76%), although nationally more are very satisfied (24% in GM, 30% nationally).

Level of satisfaction with local area



% with 'low' satisfaction of local area compared to S7-9 GM average (14%)*:

Demographics:

- Those with a disability (20%), including mental ill health (27%), a learning disability (25%)
- Those in other ethnic groups (25%)
- Those renting from a housing association or trust (24%)

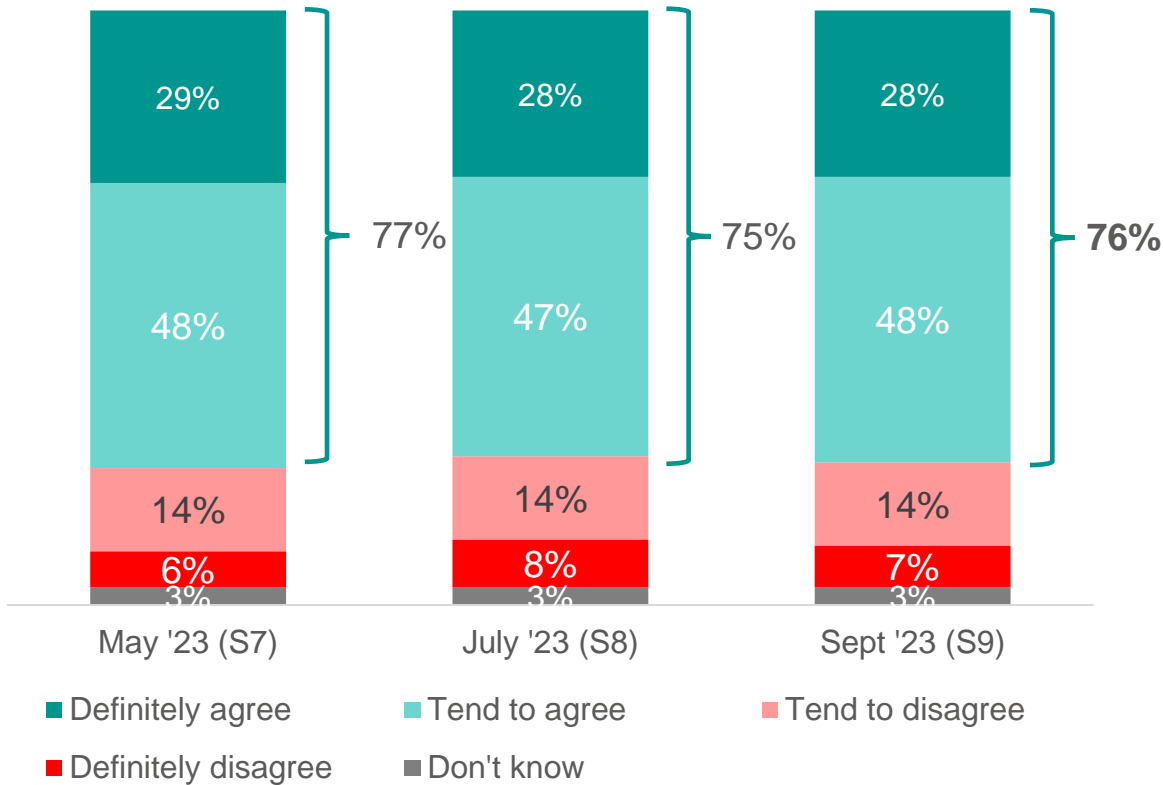
Individual and/or family circumstance:

- Those who would not recommend their local area (55%)
- Those who disagree that people from different backgrounds get on well together in their local area (36%)
- Those who disagree that people look out for each other in their local area (32%)
- Those who disagree they are able to look after their own health (29%)
- Those with low life satisfaction (28%), or low feelings that life is worthwhile (28%), and low happiness (25%)
- Those who disagree that they know enough about their own health (28%)
- Those not in work due to ill health or disability (28%)
- Those who disagree there are cultural opportunities in their local area (27%)
- Those finding it difficult to manage their current level of debt (25%)
- Those who are financially vulnerable (22%)

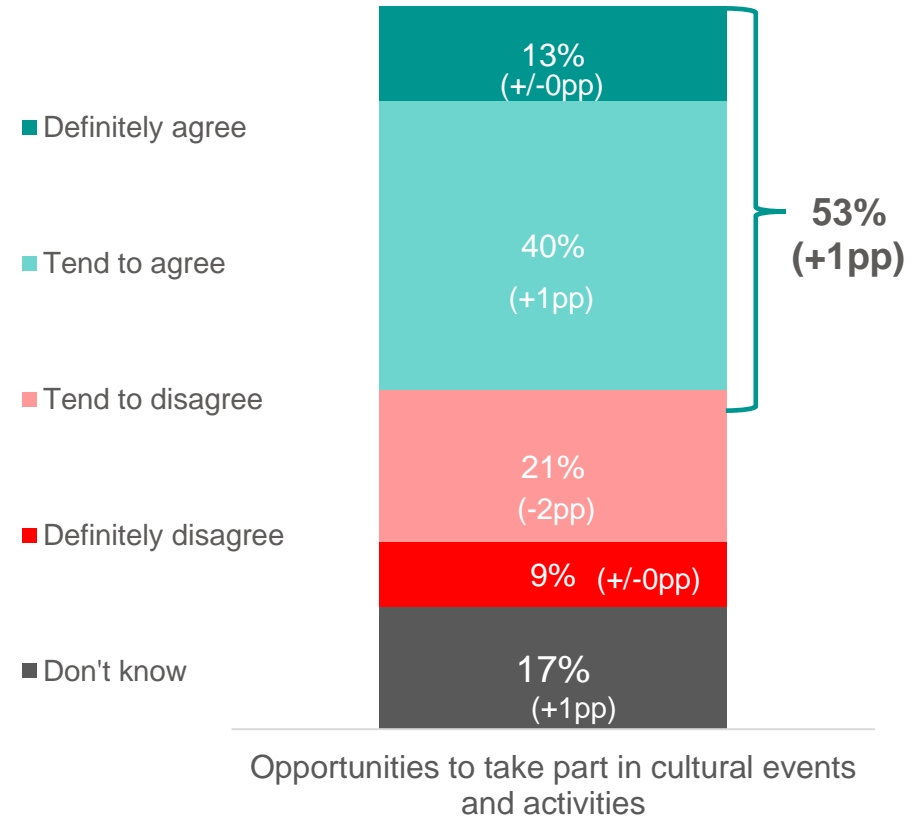
LA2. Overall, how satisfied or dissatisfied are you with your local area as a place to live? *Relates to the 10% of respondents who said they are fairly dissatisfied with their local area, and the further 6% who said they are very dissatisfied. Unweighted base: Greater Manchester Residents Survey 6: 1767, Survey 7: 1488, Survey 8: 1612, Survey 9: 1560

Three quarters (76%) of respondents would recommend their local area as a good place to live. Around half (53%) agree there are opportunities to take part in cultural events and activities in their local area

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



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

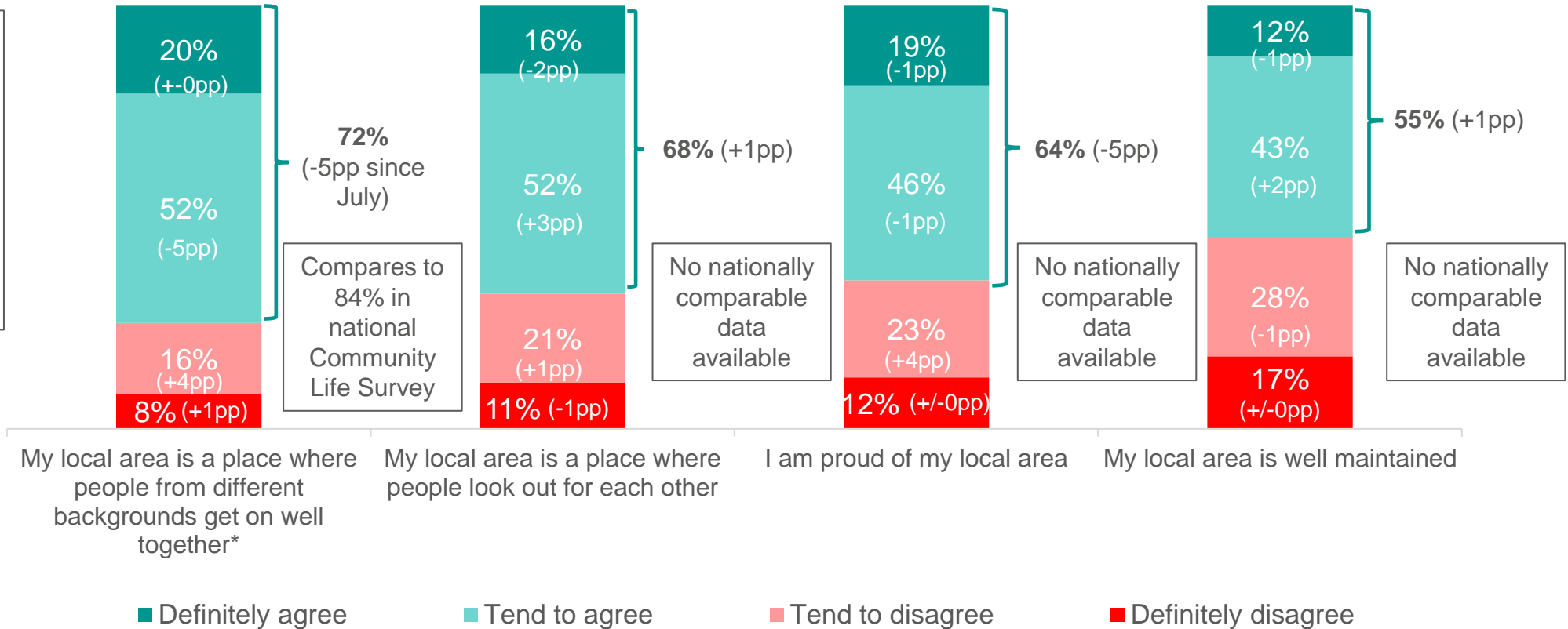


Bracketed figures show changes from S8 (July)

↑ ↓ Significantly higher/lower than W8

Almost 3 in 4 residents (72%) agree their local area is a place where people from different backgrounds get together. Around 2 in 3 agree they their local area is one they are proud of (64%) and where people look out for each other (68%). Just over half agree their local area is well maintained (55%)

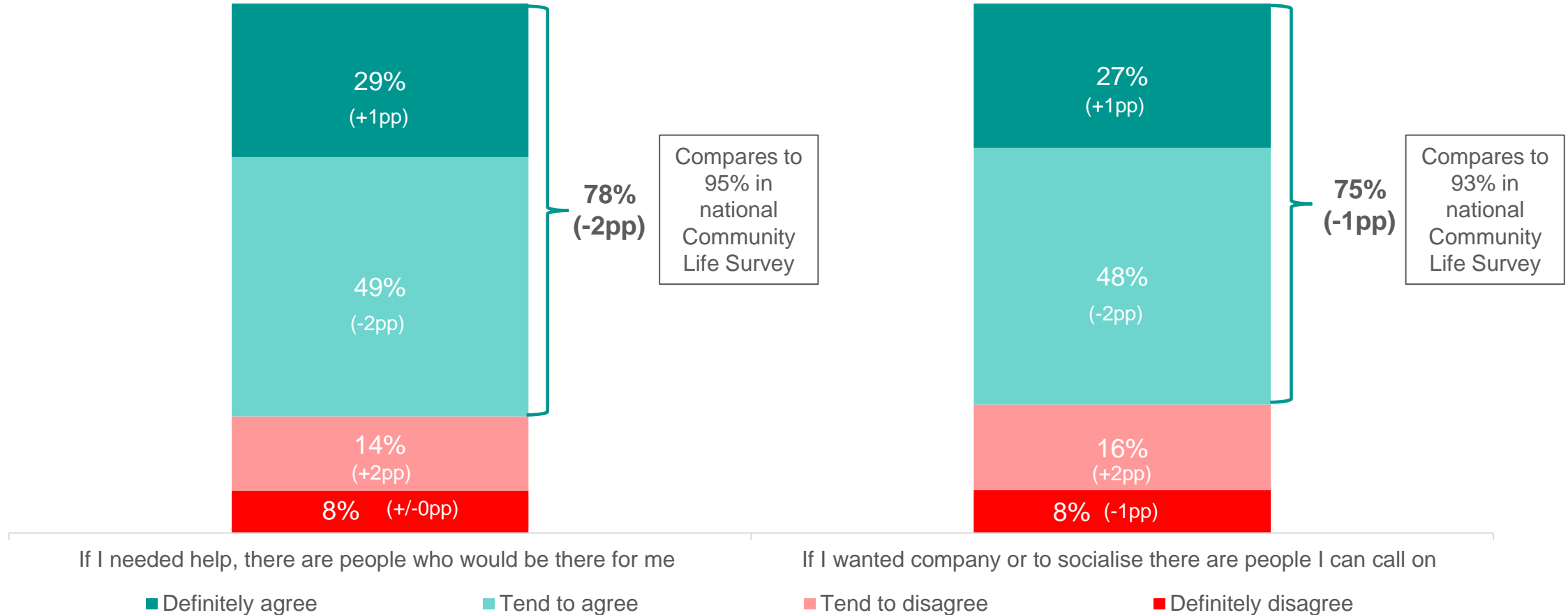
*The codes 'There are too few people in the local area' and 'People in this area are all of the same background' have been removed from this chart for visual purposes and to ensure benchmarking against DCMS figures



Figures in brackets show change since July (S8)

7 in 10 (72%) of respondents say that their local area is a place where **people from different backgrounds get on well together**. 3 in 4 respondents say that if they needed help, there are people who would be there (78%) and they have people to socialise with (75%)

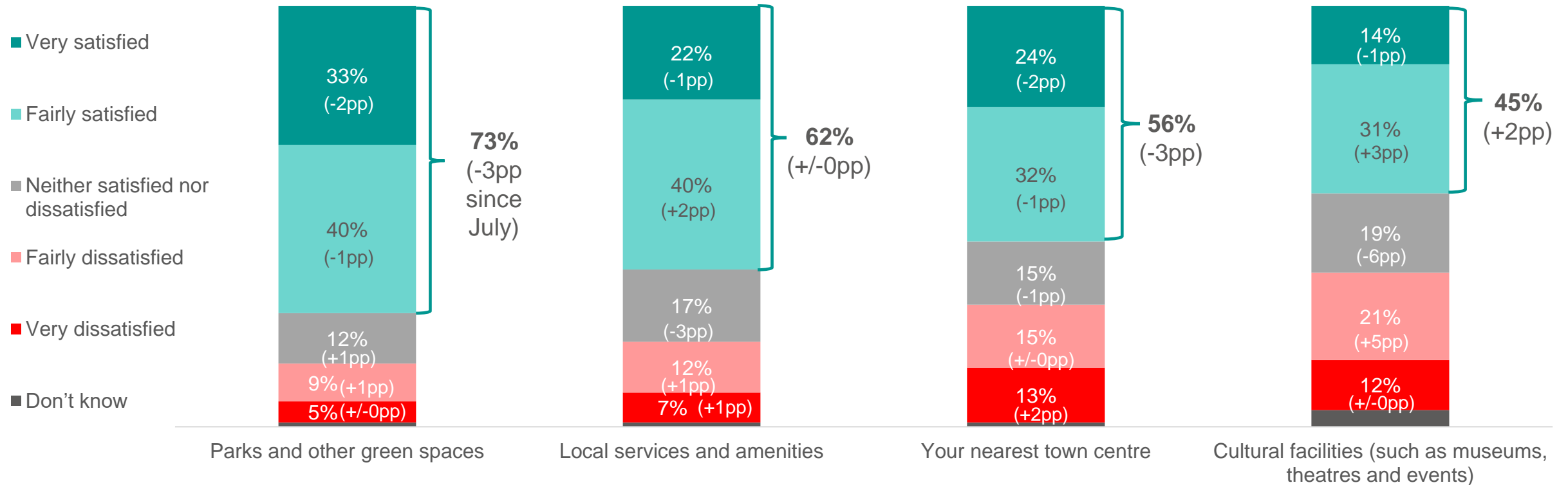
To what extent do you agree or disagree...?



Bracketed figures show changes from S8 (July)

LA6. To what extent do you agree or disagree with the following statements about your local area? Unweighted base: All respondents Survey 9, 1560 (Valid responses) Only valid responses shown excl. DK/NA. The codes 'There are too few people in the local area' and 'People in this area are all of the same background' have been removed from this chart for visual purposes, meaning chart doesn't add up to 100% *DCMS Community Life Survey uses an online, self-completion method, along with a paper survey approach

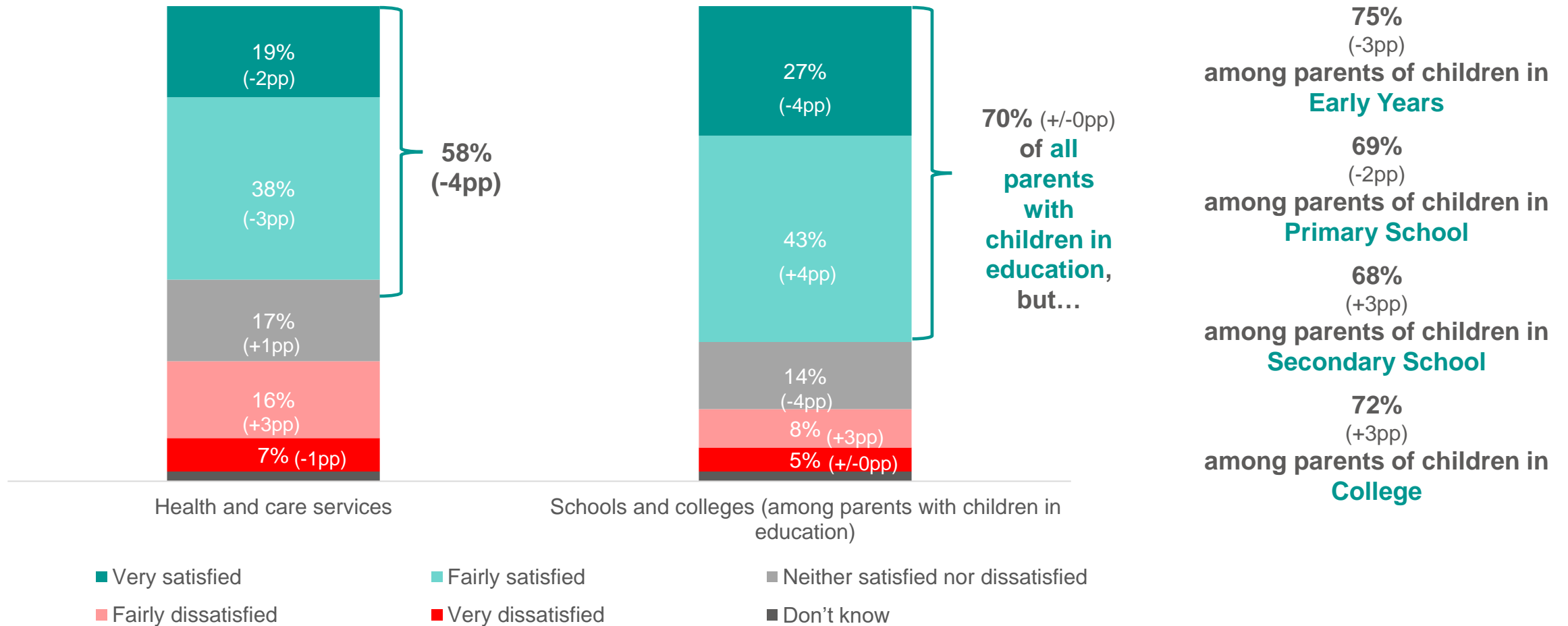
Residents are most likely to be satisfied with the **parks and other green spaces** in their area (73%), along with **local services and amenities** (62%). Fewer respondents are satisfied with their **local town centre** (56%), and with the **cultural facilities in their local area** (45%). In relation to the cultural offer, 1 in 3 respondents (33%) express a level of dissatisfaction, up 5pp since July



Figures in brackets show change since July (S8)

58% of residents are satisfied with the **health and care services** in their local area. 70% of parents with children in education are satisfied with the **schools or colleges** in their local area

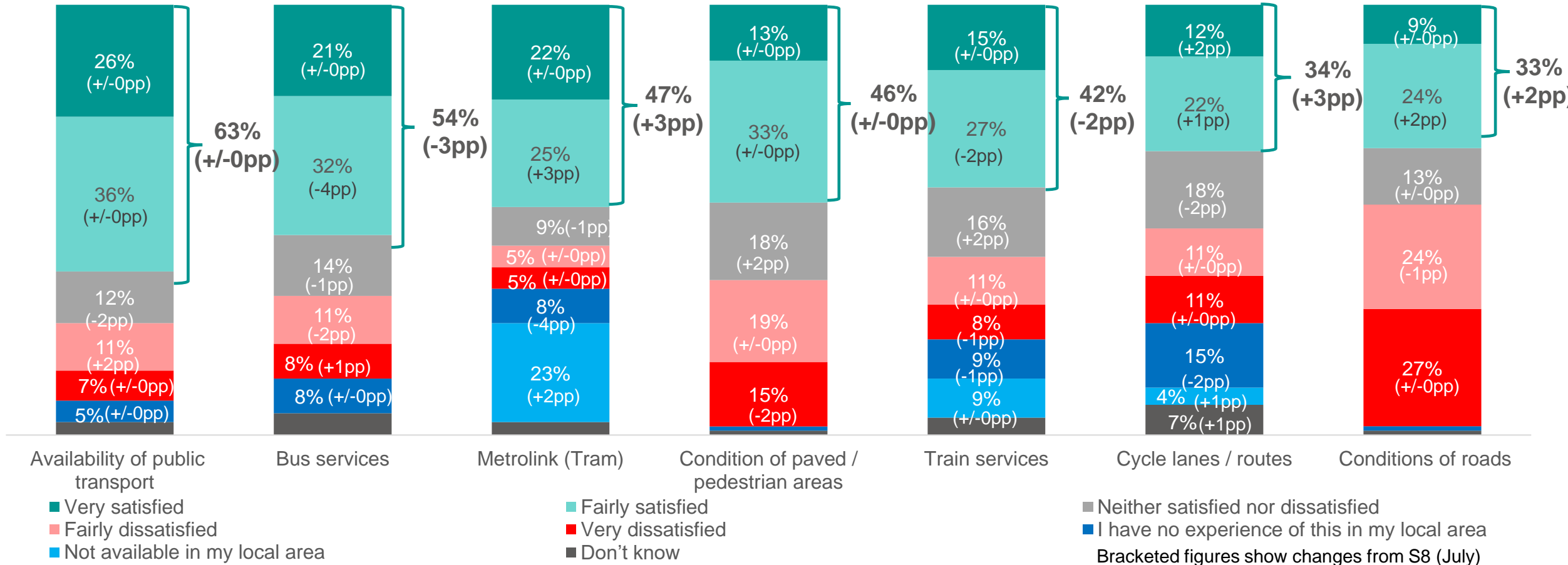
How satisfied are GM respondents with the following in your local area...



Bracketed figures show changes from S8 (July)

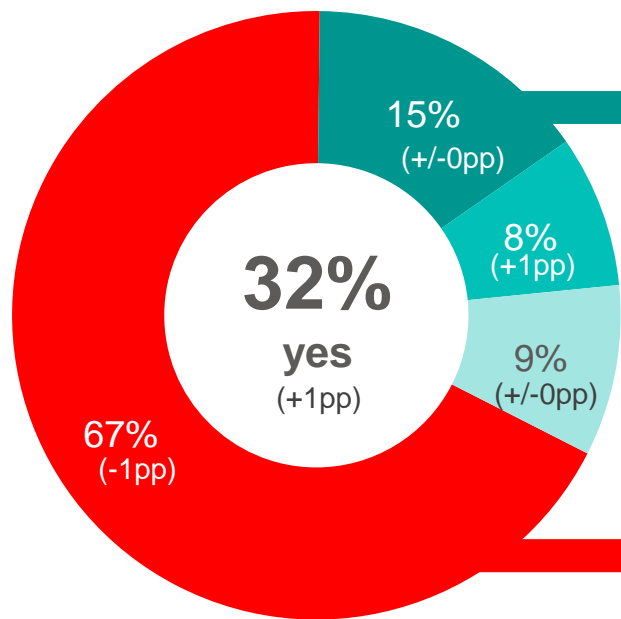
63% of residents are satisfied with the **availability of public transport** in their local area, with 54% being satisfied with the **bus services** in their local area. Around a third of residents are satisfied with the **cycle lanes / routes** (34%) and the **conditions of roads** (33%)

Level of satisfaction with transport and travel facilities



1 in 3 (32%) respondents have volunteered in the past year. Those most likely to have volunteered include those who belong to racially minoritized groups, those with a learning disability, and respondents aged 16-24 years old

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



- No
- Yes, at least once a week
- Yes, less than once a week but at least once a month
- Yes, less often

Bracketed figures show changes from S8 (July)

The following groups are more likely to volunteer, compared to the Greater Manchester average (32%):

- 61%** Jewish respondents
- 46%** Those with a learning disability
- 41%** Those with caring responsibilities
- 40%** Those from within racially minoritised groups
- 41%** 16-24-year-olds
- 36%** Parents
- 34%** Christian respondents

The following groups are less likely to volunteer, compared to the Greater Manchester average (67%):

- 85%** Those not in work due to ill health or disability
- 80%** Those out of work for 6+ months
- 80%** Those gambling once or twice a year
- 75%** Those taking an action due to rise in cost of living
- 75%** Those aged between 55-64
- 74%** Those dissatisfied with their local area

Cost of living and food security

Overview and context

[page 35](#)

Cost of living and food security key findings

[pages 36-37](#)

Cost of living detailed findings

[page 38-52](#)

Food security detailed findings

[page 53](#)



Cost of living and food security – context and approach

Cost of living has been a central theme in the Greater Manchester Residents' Surveys since September 2022 (and has therefore now been covered across seven waves). Food security has been included, to differing degrees, across nine surveys since February 2022. While remaining a vital consideration, food security questions have been reduced in recent waves, to provide space for focus on other exploratory areas.

As questions on cost of living have been asked across multiple surveys, we have tracked data over time. We have also merged data where possible, meaning that the sample is larger and more robust and greater analysis of sub-groups is possible. Questions within this section use a merged sample from the results from surveys 7, 8 and 9.

The focus of this research is to provide a growing base of evidence, which can highlight potential trends and indicators which individual localities and partners can explore in greater detail. As this evidence base has grown across multiple surveys we are able to provide greater depth on which groups are likely to be more affected by the issues explored, highlighting those where more investigation would prove useful. In certain instances, to allow for greater exploration of data by local authority or to show long-term trends, a merged sample from waves 3 – 9 has been used.

Data in the cost of living section of this report has been compared against the latest survey results from the ONS' Opinions and Lifestyle Survey in Great Britain, where comparable information exists. Fieldwork for this survey in Great Britain is completed fortnightly and so comparisons of the GM survey (fieldwork 4 – 18 Sep 2023) have been compared to the most closely matched ONS fieldwork period, between 6 – 17 Sep 2023. ONS uses a mixed methodology, both online and telephone interviews. Please note that some Greater Manchester questions in this section have had their wording or answers options adjusted to reflect changes to the ONS' Opinions and Lifestyle Survey, and so comparisons with Greater Manchester survey 3 and 4 findings may therefore not always be possible.

Cost of living – key findings (1)

COSTS OF LIVING

- 3 in 10 (30%) are experiencing some form of financial vulnerability (based on an ONS method of estimation)
 - This is higher still among those aged 35-44 (43%), parents of children under 5 (47%), respondents with a disability (40%) and those earning below the Real Living Wage (38%)
- Over half (51%) of respondents say that they are worried about heating their home this winter
- While food and energy costs remain the most common reasons for cost of living increases, significantly more respondents than in July have seen their fuel costs increase (57% of those experiencing increased costs, was 44%)
- Half (49%) of respondents say they have difficulty affording energy costs. This is significantly higher than the GB average (42%), most of which is driven by the proportion who say they find these costs very difficult, which is twice as high in GM as it is across the nation.
- 1 in 10 (11%) have missed or defaulted on a household bill in the last month
 - Bills most likely to have been missed include energy (45%), council tax (44%) and mobile phone bills (36%)

HOUSING

- As in May, 1 in 3 renters and mortgage holders (31%) have seen their payments increase
 - There have been falls in the proportions of both renters (44%, was 52% in July) and mortgage holders (37%, was 41%) saying it is difficult to afford these costs
 - While the proportion of mortgage holders who are behind on their payments has fallen (4%, was 7% in July), among renters this has increased (17%, was 13%)
 - The increase in renters behind on their rent is driven by increases among those renting from the local authority or council (24%, was 12%) and from a housing association or trust (24%, was 18%)
-

Cost of living – key findings (2)

FINANCIAL SITUATION AND BORROWING

- 68% of residents who are in debt are experiencing difficulty because of their financial situation. This is higher still among certain groups, including parents (72%)
- There has been a significant increase in residents who are in debt who have sought help (62%, was 51% in July). They are more likely to go to friends and family first (36%), followed by their energy provider (18%) and Citizens Advice (12%).
- Those struggling with their debt and who have not sought any help state they did not think the advice would make a difference (29%), or because they were anxious or embarrassed (21% respectively)

LONG TERM TRENDS (Generally, tracked data shows the financial situation of GM respondents is getting better over time)

- 2 in 5 (44%) say they will be able to save money over the next 12 months; this figure has risen by 11 percentage points since the first time this question was asked first a year ago in September 2022 (33%)
- Over half (52%) say they can afford an unexpected but necessary expense of £850, an increase of 5 percentage points since September 2022 (47%)

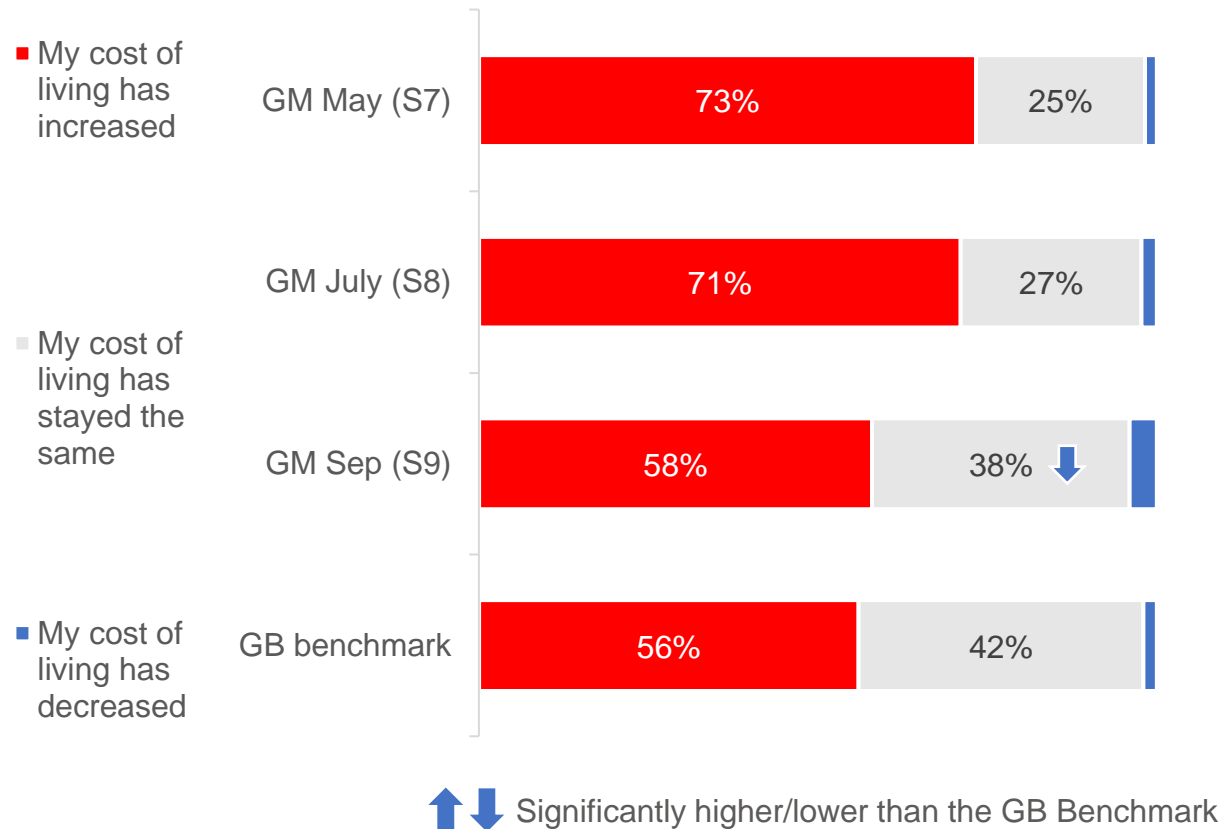
FOOD SECURITY (Continues to impact on residents' day-to-day lives, with no firm trends suggesting issues are decreasing)

When asked to reflect on the last 12 months:

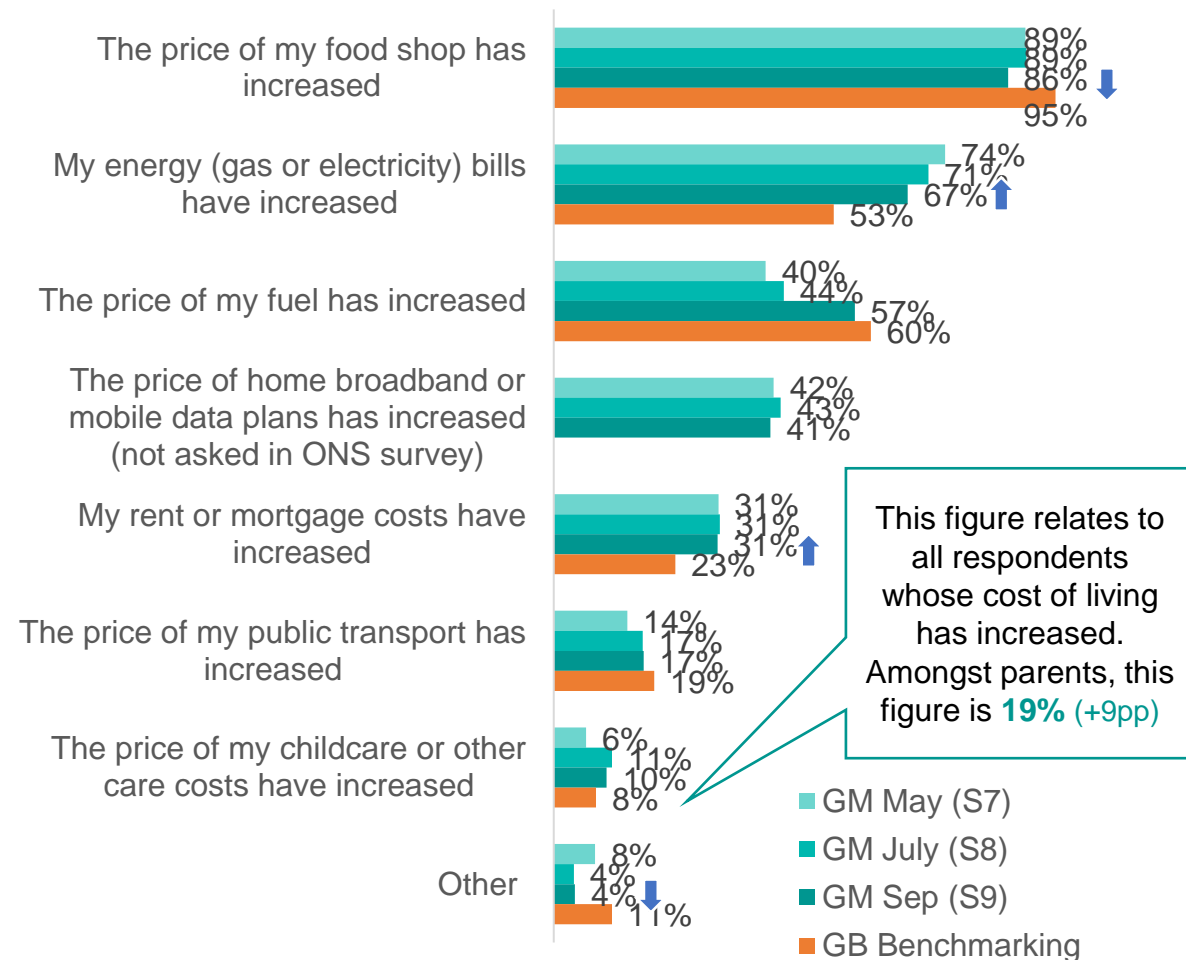
- 39% of respondents said they 'often' or 'sometimes' couldn't afford to eat balanced meals, including 13% saying 'often'
 - 36% have 'often' or 'sometimes' worried whether their food would run out before they got money to buy more, including 12% saying 'often'
 - 32% have 'often' or 'sometimes' found the food they bought didn't last and didn't have money to get more, including 11% saying 'often'
-

3 in 5 (58%) respondents say their **cost of living has increased in the last month. This is consistent with the GB average (56%), but significantly lower than July (71%). GM respondents are more likely than the GB average to say that increases are due to higher rent or mortgage costs (31% vs. 23%)**

Change in cost of living over the last month

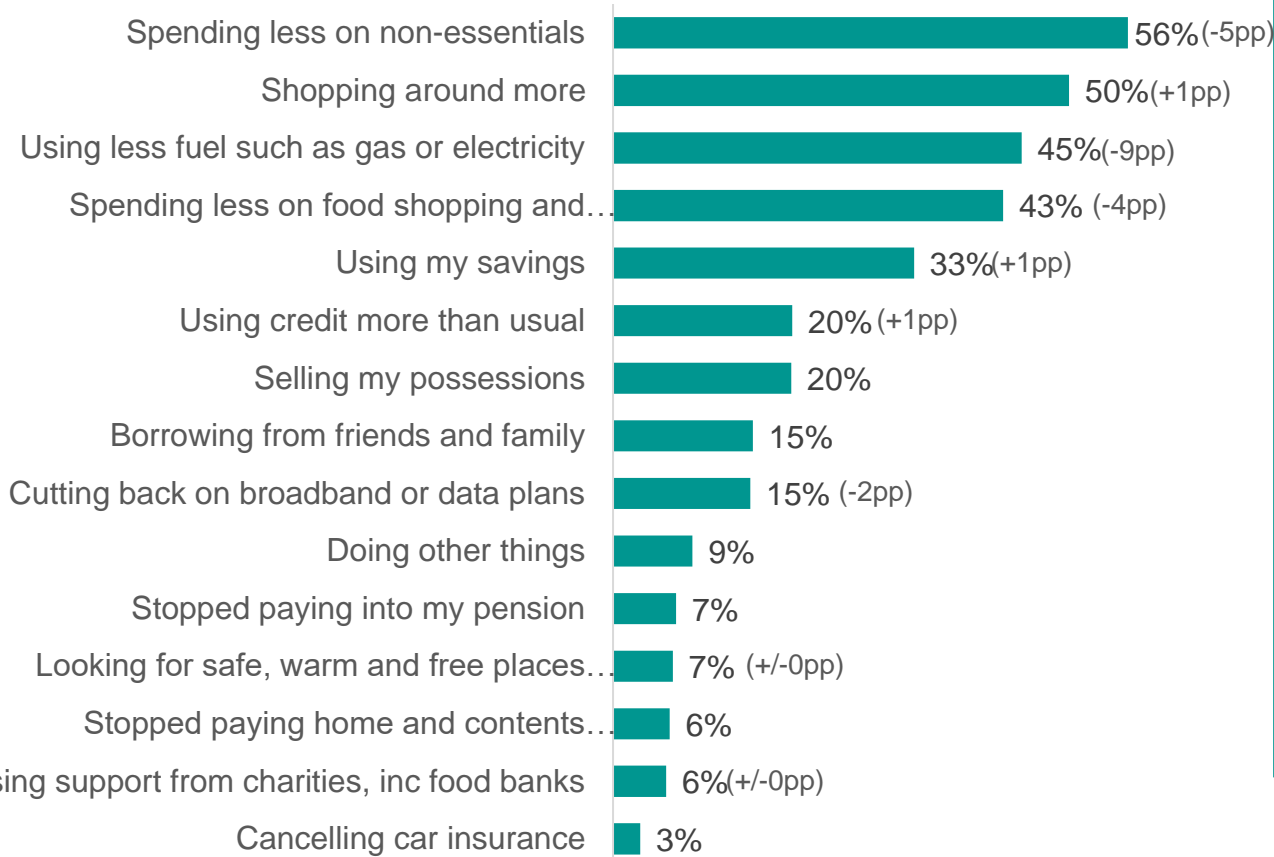


Reasons for increase in cost of living (n=945)

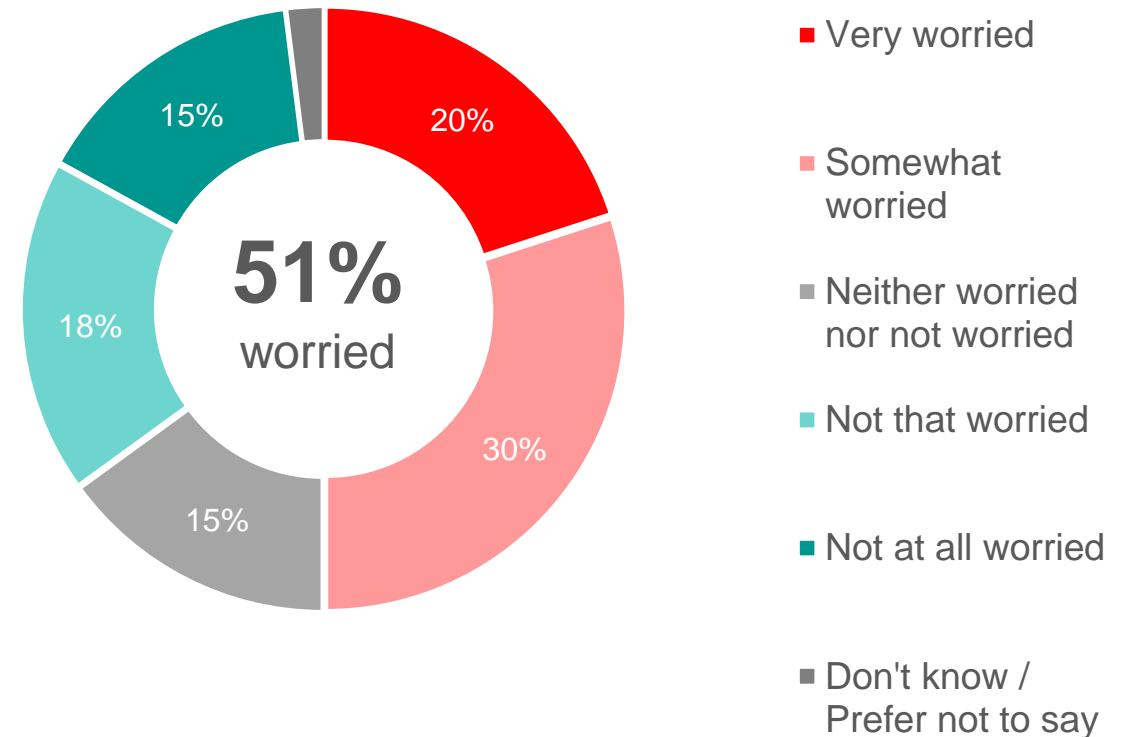


Summary: Household impacts

Residents are more likely to be spending less on non-essentials, shopping around more and using less fuel as a result of the increases in the cost of living – though some of these behaviours have fallen since March '22



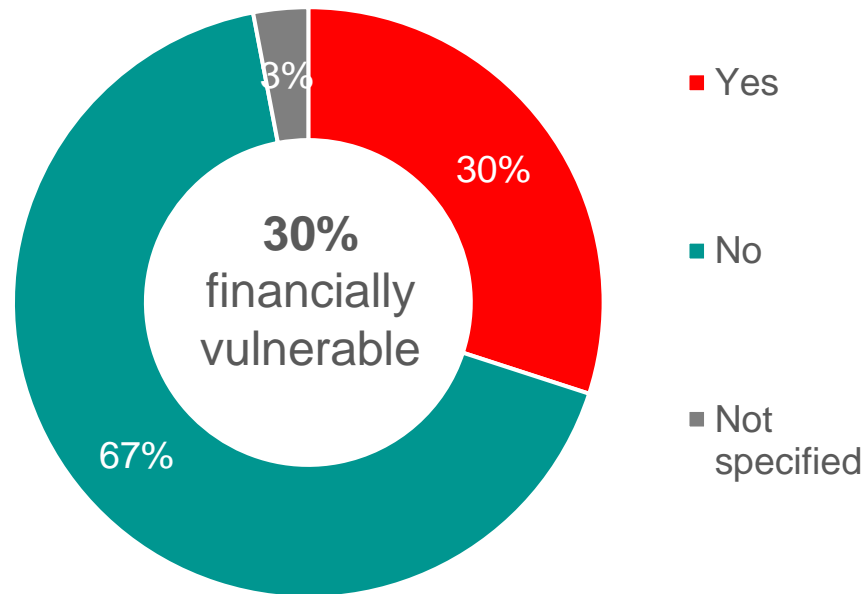
Just over half of residents are worried about heating their home this winter, including 1 in 5 who are very worried. Worry is more common among those within racially minoritised communities, with a personal disability and parents



3 in 10 (30%) are experiencing some form of financial vulnerability (based on an ONS method of estimation). This is higher still among those aged 35-44 (43%), parents of children under 5 (47%), respondents with a disability (40%) and those earning below the Real Living Wage (38%)

The Office for National Statistics (ONS) has devised a measure of financial vulnerability, based on four questions regularly asked in national surveys that are mirrored in the GM Residents' Survey. The questions relate to [ability to cope with an unexpected expense](#); [ability to save](#); [borrowing behaviour](#); and [affordability of energy bills](#).

Using this method, almost a third (30%) of residents are experiencing financial vulnerability



Financial vulnerability (30% in GM) is higher amongst ...

Parents of children under 5	35-44-year-olds	Disability in the household	Those earning below the Real Living Wage*
47%	43%	40%	38%

Increases in food, energy and rent/mortgage costs are driving the rise in living costs over the last month.

Of those who have noted increases:

86% say the price of their food shop has increased (a significant fall from 89% in July)

67% say the price of their energy has gone up

57% say the price of their fuel have increased (a significant rise from 44% in July)

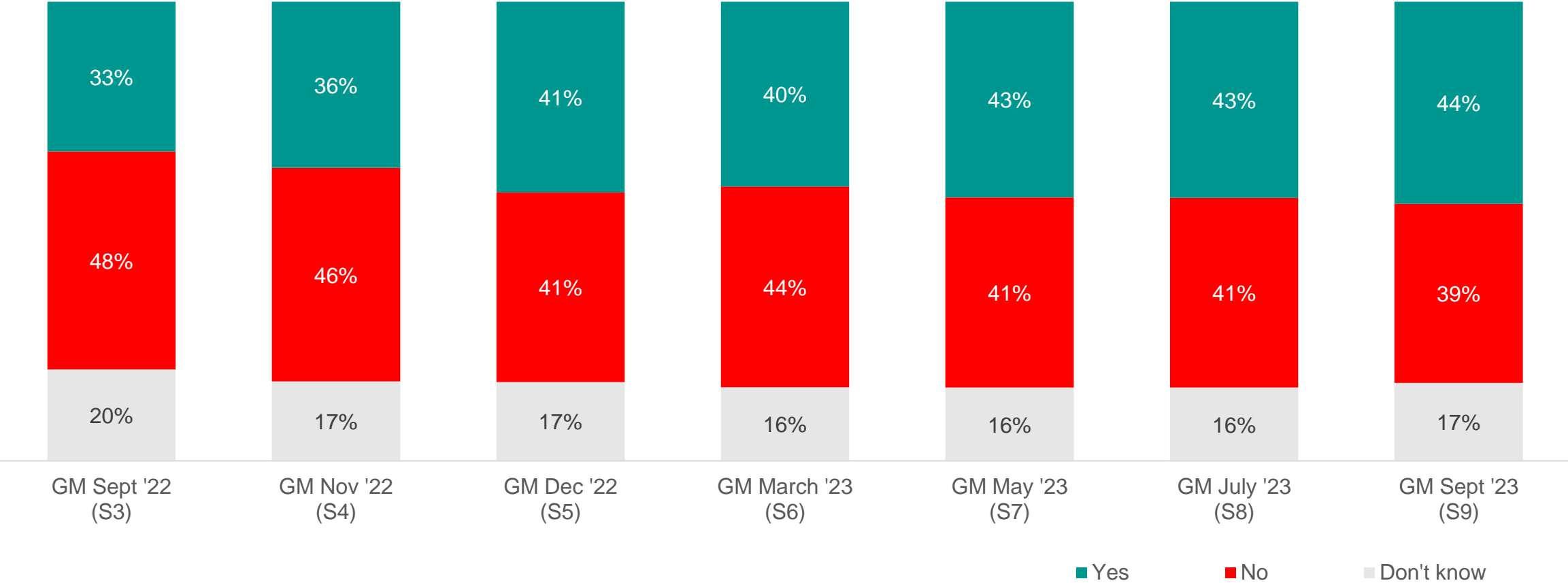
31% of renters / mortgage holders say the price of their rent or mortgage costs have increased

All data is from Sept (S9). Unweighted base: 1560 (All respondents); 1162 (All who have had their cost of living increase)

*The Real Living Wage is defined as those earning £15,599 and below

2 in 5 respondents say they will be able to **save money over the next 12 months** (44%). Since the first time this question was asked in September 2022, respondents' ability to save money has increased by 11 percentage points

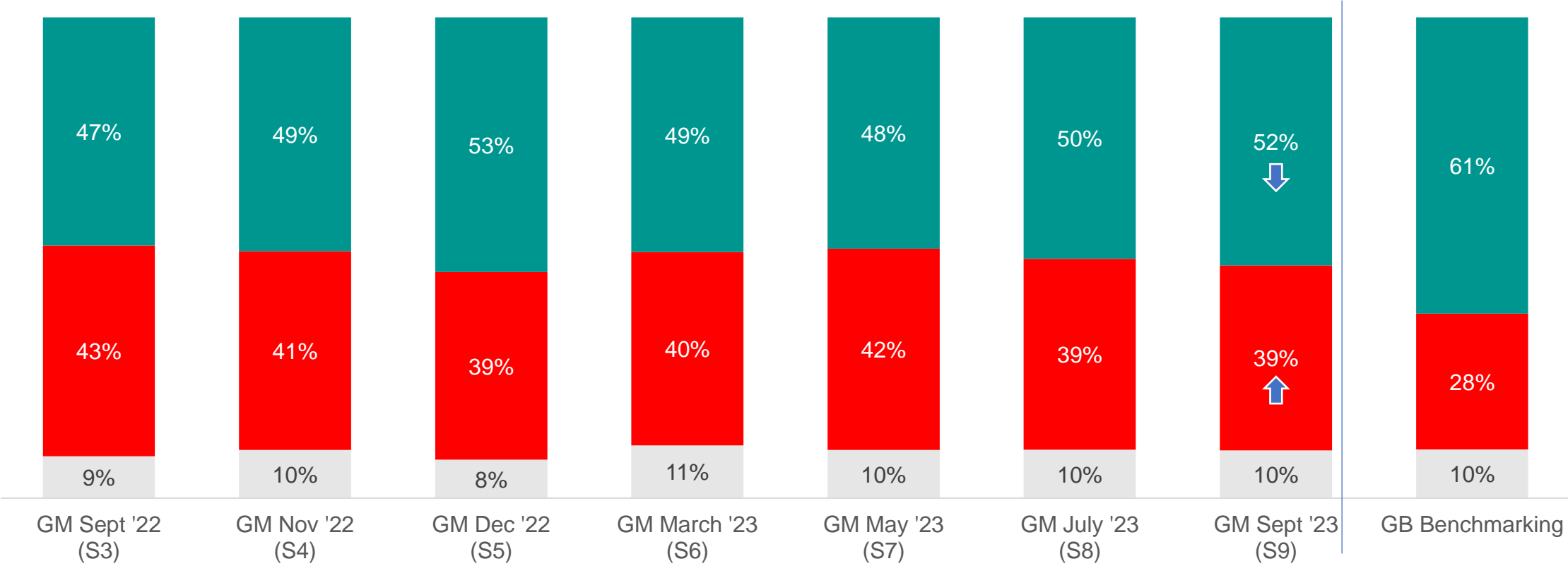
Will you be able to save money over the next 12 months?



CL1. In view of the general economic situation, do you think you will be able to save any money in the next 12 months?
 Unweighted base: Survey 3, 1677; Survey 4, 1636; Survey 5, 1470; Survey 6, 1767; Survey 7, 1488; Survey 8, 1,612; Survey 9, 1,560 (All respondents).

Greater Manchester respondents are less likely than the GB average to be able to afford an unexpected expense of £850 (52% vs. 61% unable to afford). The ability to afford an expected expense has increased slightly over time (52% in Sept '23 cf. 47% in Sept '22), though this has not been steady

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



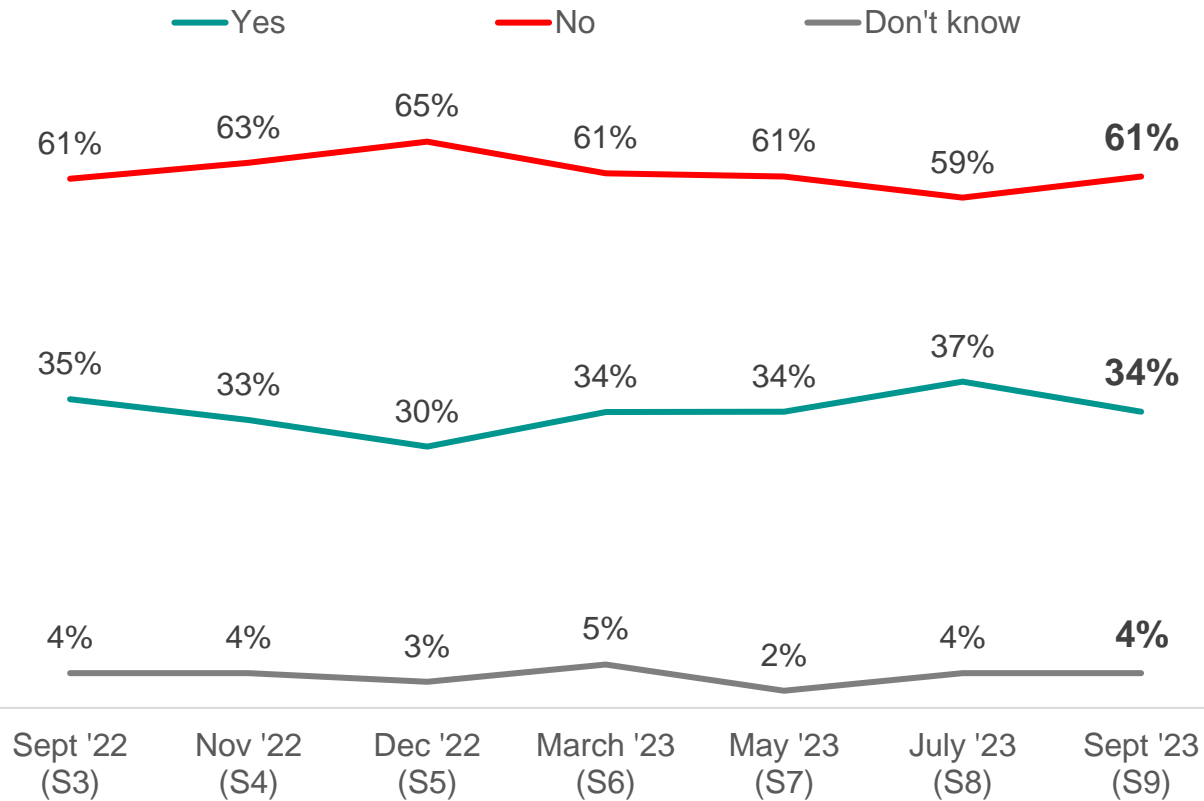
↑↓ Significantly higher/lower than the GB Benchmark

■ Yes ■ No ■ Don't know

CL2. Could your household afford to pay an unexpected, but necessary, expense of £850? Unweighted base: Survey 3, 1677; Survey 4, 1636 Survey 5, 1470; Survey 6, 1767; Survey 7, 1488; Survey 8, 1612; Survey 9, 1560 (All respondents). ONS data, based on national fieldwork 6-17 Sept 2023

1 in 3 (34%) GM respondents are more likely to have borrowed more money in the past month compared to the same time last year.

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



Between May and September (surveys 7-9), those who have borrowed more money or used more credit than usual in the last month, compared to the GM average (35%), are higher among:

Demographics:

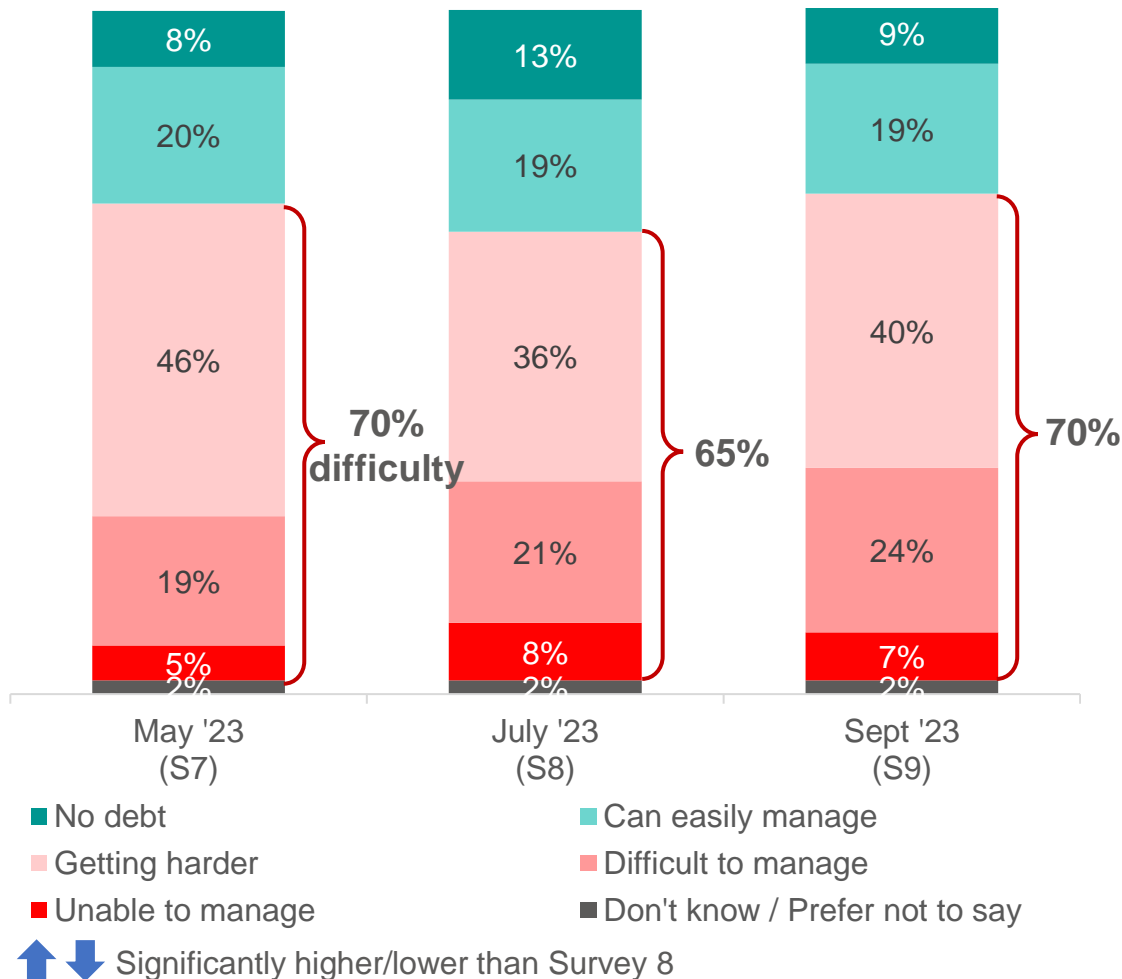
- Those aged 35-44 (47%) and those aged 18-34 (46%)
- Those from Minority Ethnic Groups (45%)
- Those with a disability (44%) including those with a learning disability (62%), those with mental ill health (57%) and those with a sensory disability (45%)
- Those whose first language is not English (43%)
- Those who are not heterosexual (42%)

Individual and/or family circumstance:

- Those finding it difficult to afford their mortgage (61%) or rent (56%)
- Those with low levels of life satisfaction (54%)
- Those with low levels of happiness (53%)
- Those who do not feel that they are able to save any money in the next 12 months (51%)
- Those who feel that they are unable to look after their own health (50%)
- Those not in work due to ill health or disability (49%)
- Those earning up to £10,399 (49%)
- Parents (47%) including those with children under 5 years old (52%) and children aged 5-15 (50%)
- Those renting their home (48%) including renting from a Local Authority/Council (52%), a Housing Association/Trust (47%) or privately (46%)

Of the 1 in 3 residents who have borrowed more money or used more credit in the past month, 7 in 10 (70%) say they're experiencing **difficulty managing their current level of debt**, a fluctuation from the July figure of 65%.

Which of the following statements best describes your situation in relation to your current level of debt?



Between May and September (surveys 7-9), those who struggling to manage their debt levels, compared to the GM average (68%), are higher among:

Demographics:

- Those aged 45-64 (79%)
- Those who have a disability (76%) including those with a mobility disability (82%) and those with mental ill health (81%)

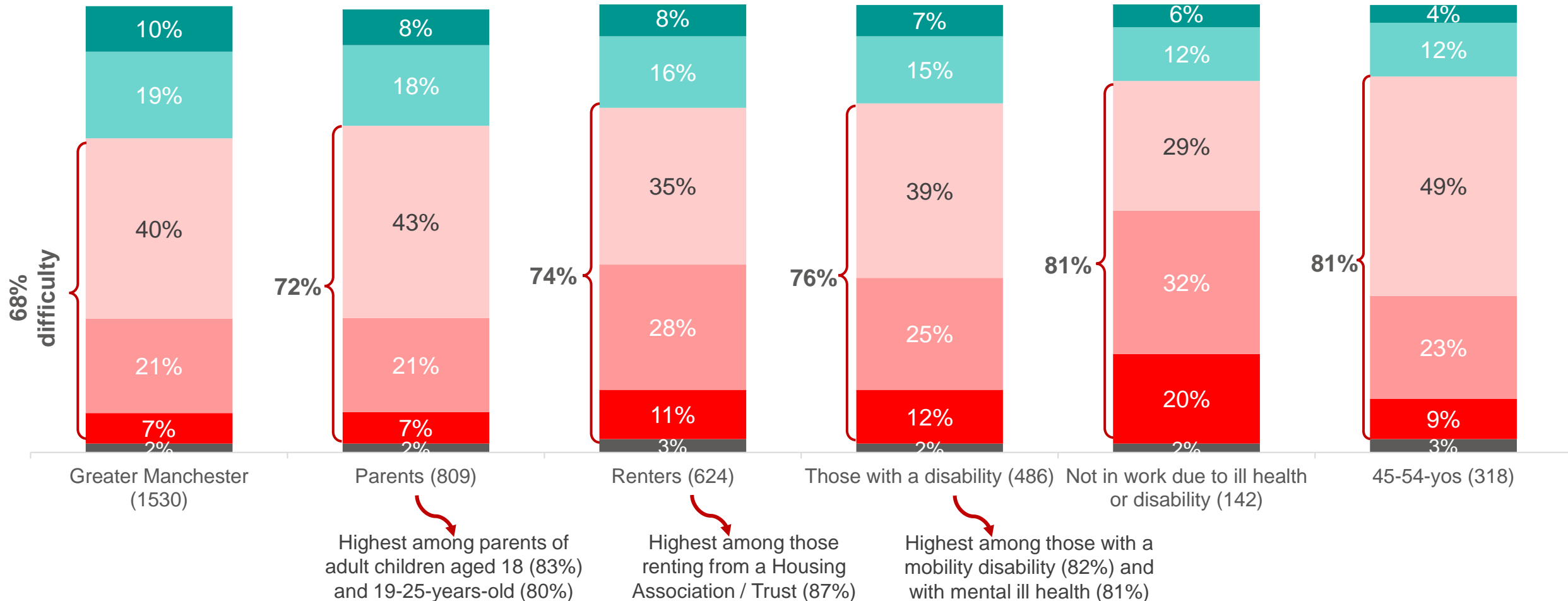
Individual and/or family circumstance:

- Those with low levels of life satisfaction (87%)
- Those who do not feel that their life is worthwhile (85%)
- Those who are financially vulnerable in some way (83%)
- Those who will not be able to save any money in the next 12 months (82%)
- Those not in work due to ill health or disability (81%)
- Those finding it difficult to afford their energy costs (80%)
- Those earning from £15,600 to £36,400 (76%)
- Those renting their home (74%), including those renting through a Housing Association/Trust (87%)
- Those who have a physical or mental condition lasting longer than 12 months (74%)
- Those who are buying their house on a mortgage (73%)
- Parents (72%) including those who have children aged 5 to 15 years old (74%)
- Those whose cost of living has increased in the last month (71%)

2 in 3 (68%) Greater Manchester residents who have borrowed more or used more credit are experiencing difficulty in relation to their current level of debt. This is higher still among segments of the population, including parents (72%), and those not in work due to ill health or disability (81%)

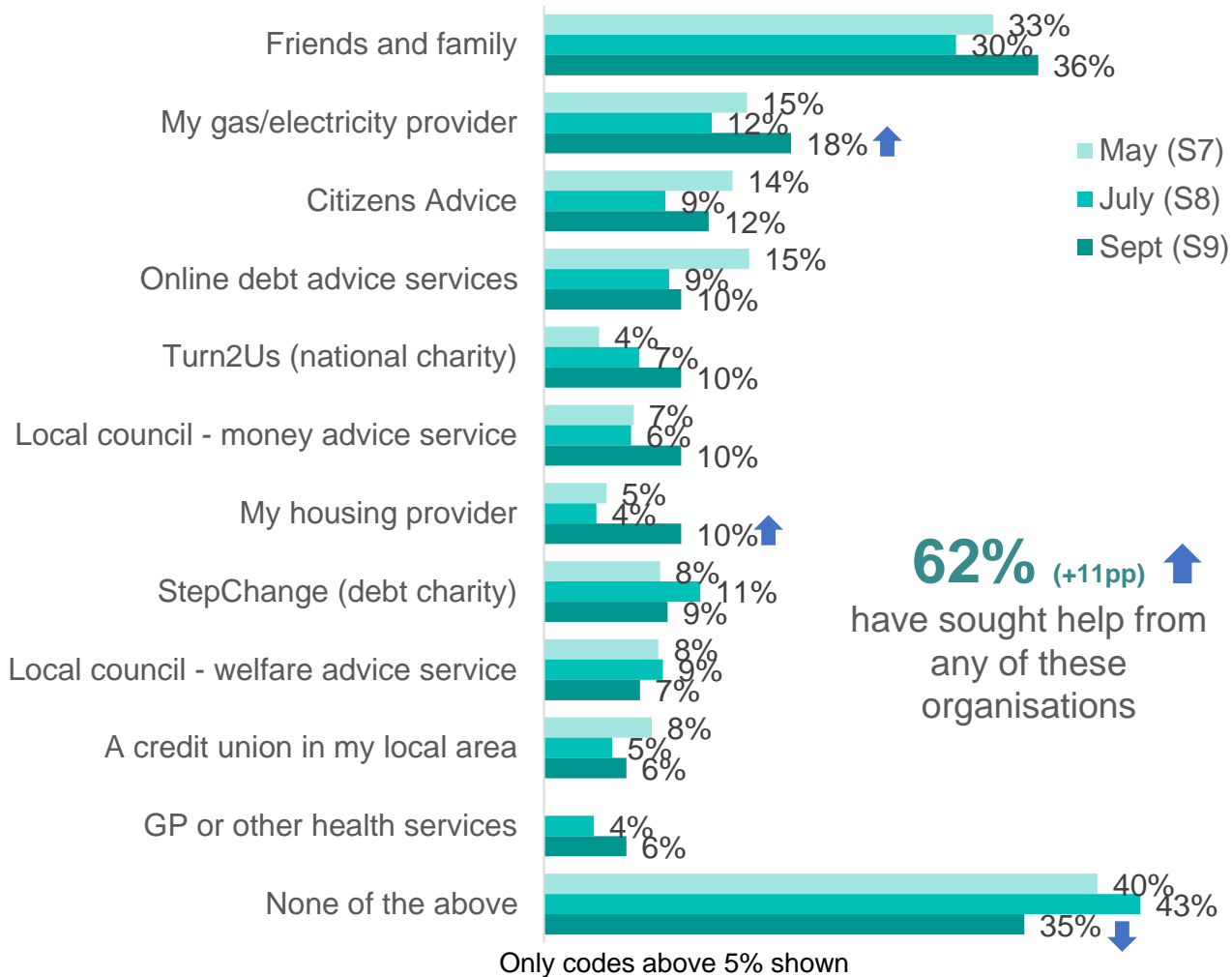
Which of the following statements best describes your situation in relation to your current level of debt?

■ Don't know / Prefer not to say ■ Unable to manage ■ Difficult to manage ■ Getting harder ■ Can easily manage ■ No debt

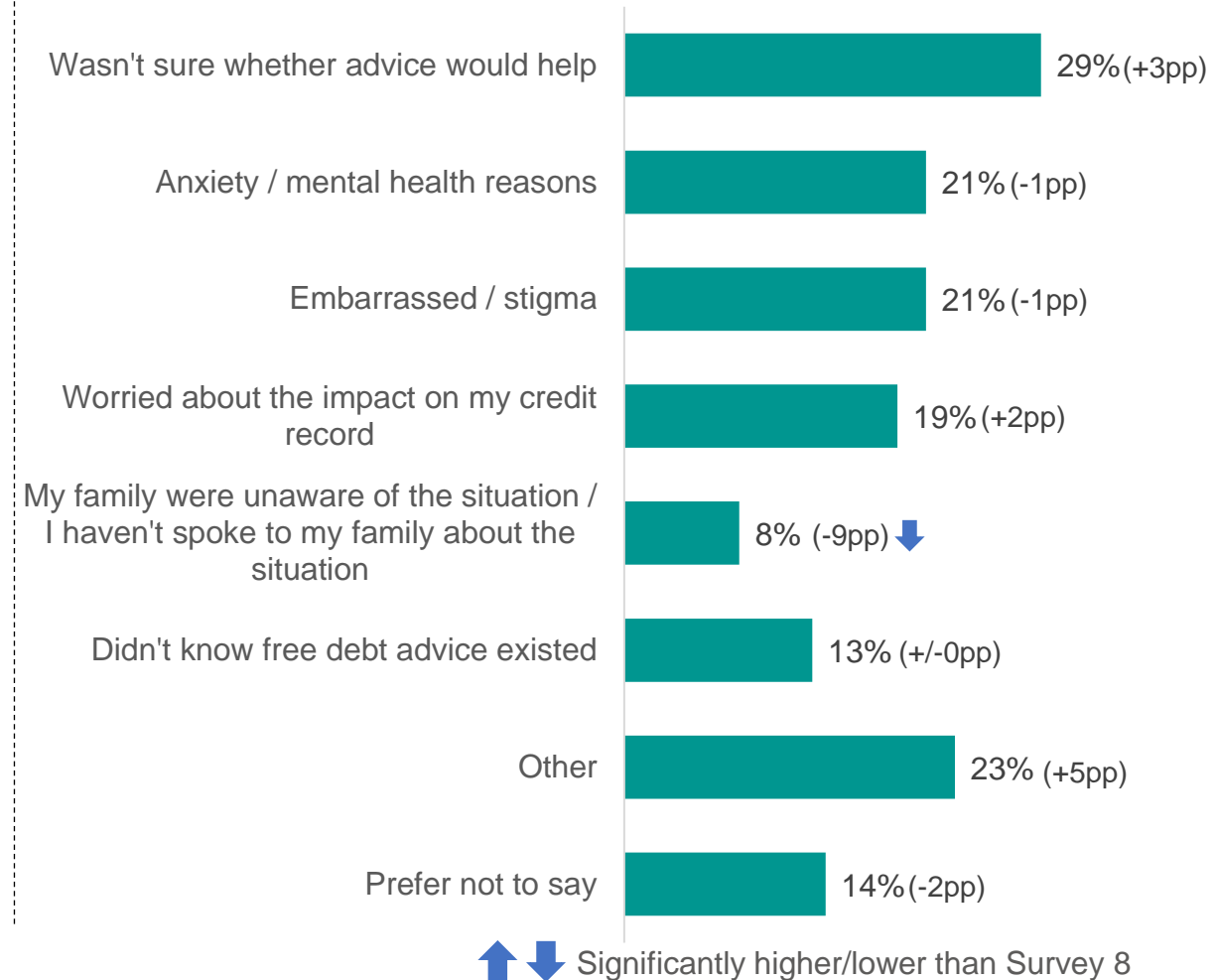


Almost 2 in 3 (62%) of those struggling with their debt say they have sought help, a significant increase since July (51%). Among those who did not seek help, 3 in 10 (29%) were unsure whether the advice would help

Among those experiencing some difficulty, have you tried to seek help with your debt through any of the following options?



Among those who have not sought advice, for what reasons have you decided not to seek advice for your debt problems?



Of the 68% of residents experiencing some difficulty dealing with their current levels of debt, 2 in 5 (40%) have not sought any help – a figure that remains roughly the same across local authorities

68%

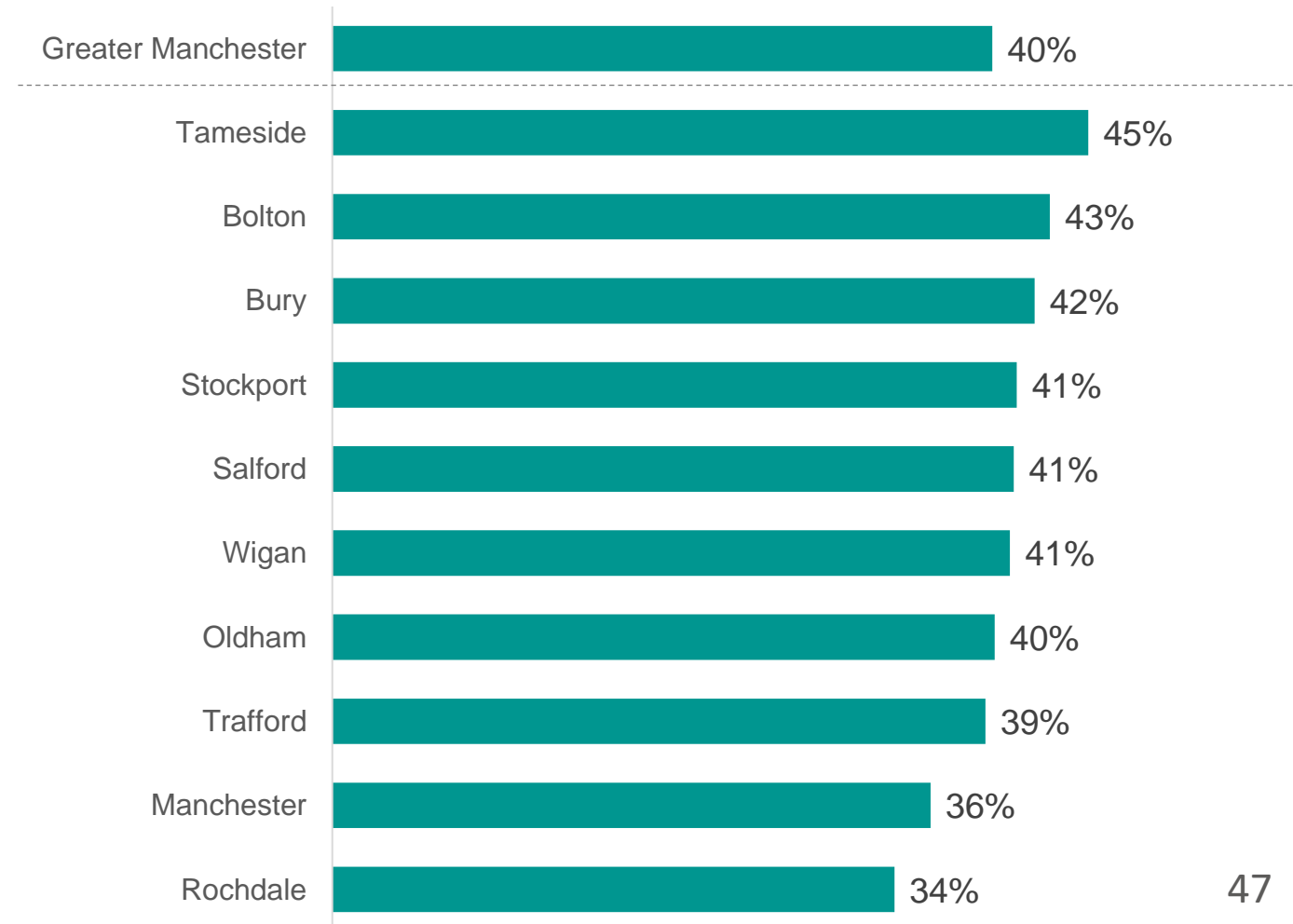
have had difficulty dealing with their current level of debt between May and September

Results since May 2023 suggest that a substantial proportion of those experiencing difficulty with their debt have not sought help

This relates to respondents who say (I) that they are borrowing more or using more credit, compared to 12 months ago, and (II) that they are struggling with debt or things are getting harder

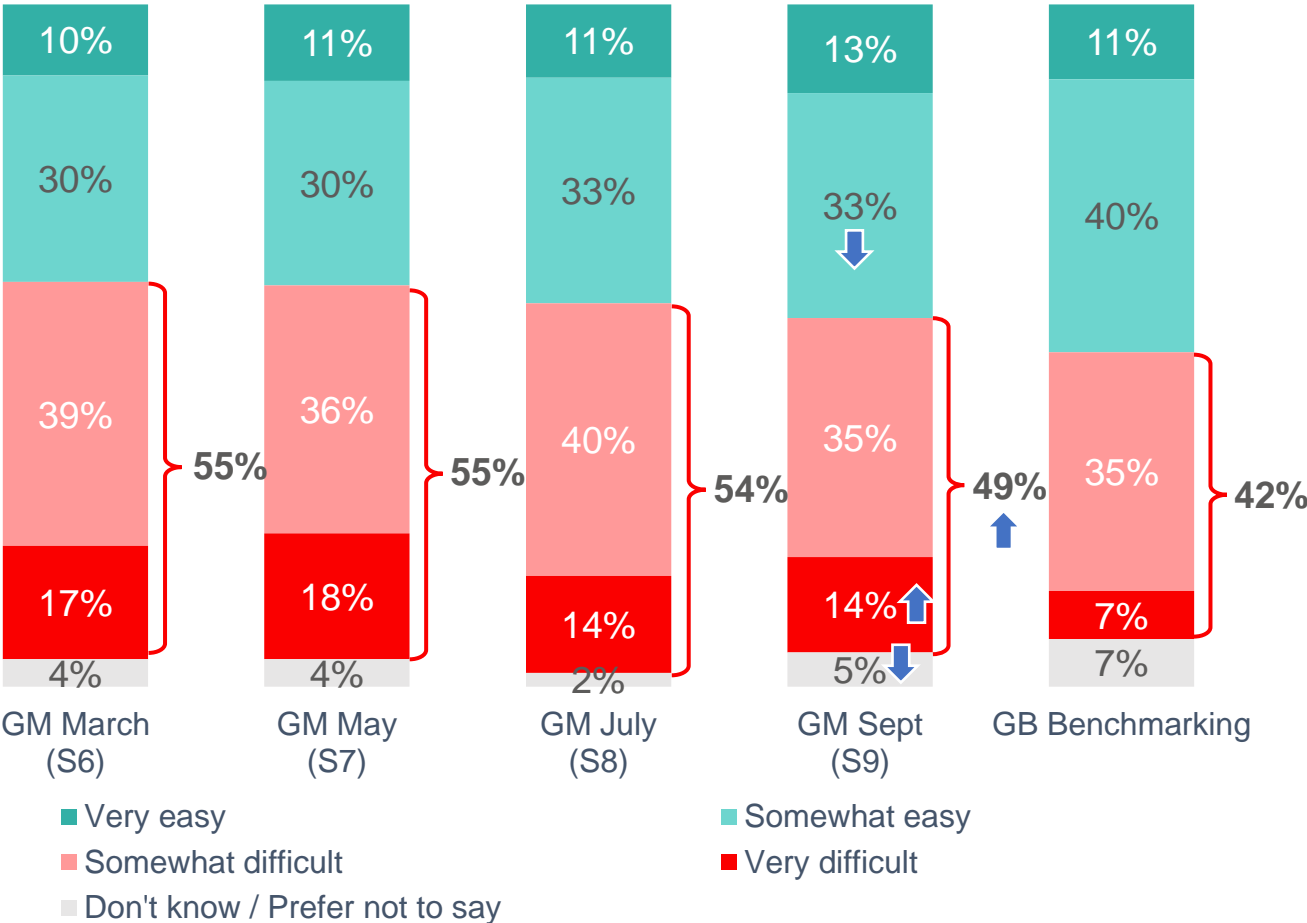
We now have sufficient data to compare figures for individual districts...

Of the 68%, those who say they have not sought help, by local authority



Around half (49%) of respondents say they have **difficulty affording energy costs**, a decrease since July (was 54%). The GM rate is significantly higher than the GB average (42%) – driven by the proportion who say they find these costs very difficult, which is twice as high here as across the nation.

Ease of affording energy costs



% who are significantly more likely to find it very/somewhat difficult to afford their energy costs compared to GM average (53%)*

Demographics:

- Those with a disability (65%), including those with mental ill health (74%), those with a mobility disability (65%) and those with another disability (68%)
- Those in Minority Ethnic Groups (63%)
- Those whose first language is not English (63%)
- Those aged 35-54 (58%)

Individual and/or family circumstance:

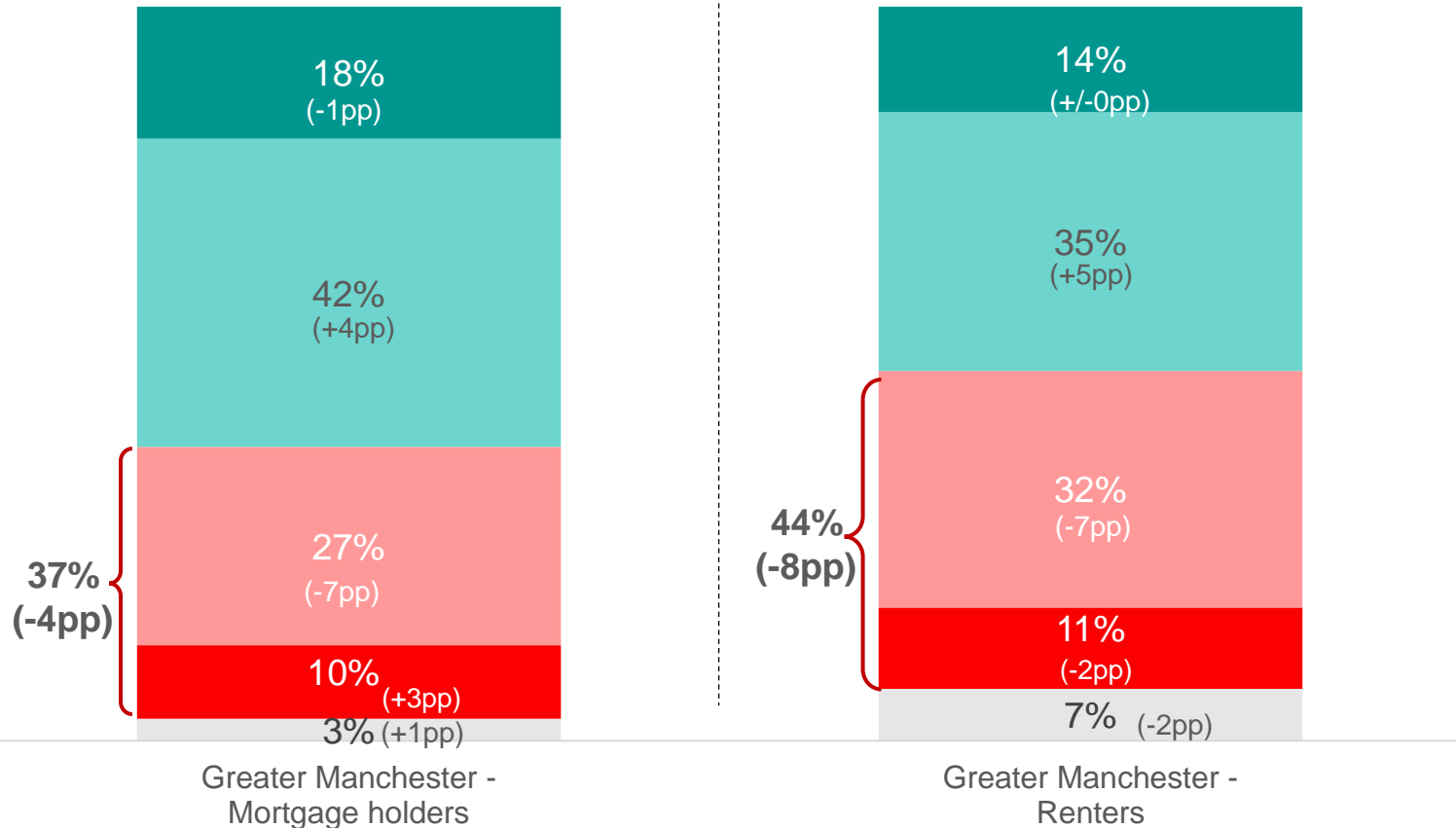
- Those finding it difficult to afford their mortgage (90%) or rent (88%)
- Those not in work due to ill health or disability (79%)
- Those unable to save any money in the next 12 months (76%)
- Those with a household income of up to £10,399 (76%)
- Those renting their home (65%) including those renting from a Housing Association/Trust (70%), a Local Authority/Council (67%) or privately renting (62%)
- Those living with 4+ people in their household (63%)
- Parents (60%) including those with children aged 18 (65%), 16-17 (64%), 19 to 25 (64%) and 5-15 (60%)

↑↓ Significantly higher/lower than the GB Benchmark

* Subgroup analysis uses merged data from S7-9

There have been declines since July in the proportions of both renters (44%, was 52%) and mortgage holders (37%, was 41%) saying that they find it **difficult to afford their rent or mortgage payments**.

Ease of affording rent or mortgage payments



(Results may be being impacted by a large difference between the proportion of respondents answering "don't know")

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

Figures in brackets show change since May (S7)

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

- Those finding it difficult to, or those unable to manage their current levels of debt (77%)
- Those who are financially vulnerable (70%)
- Those with low levels of life satisfaction (62%)
- Those not able to save any money in the next 12 months (60%)
- Those who do not feel able to manage their own health (56%)

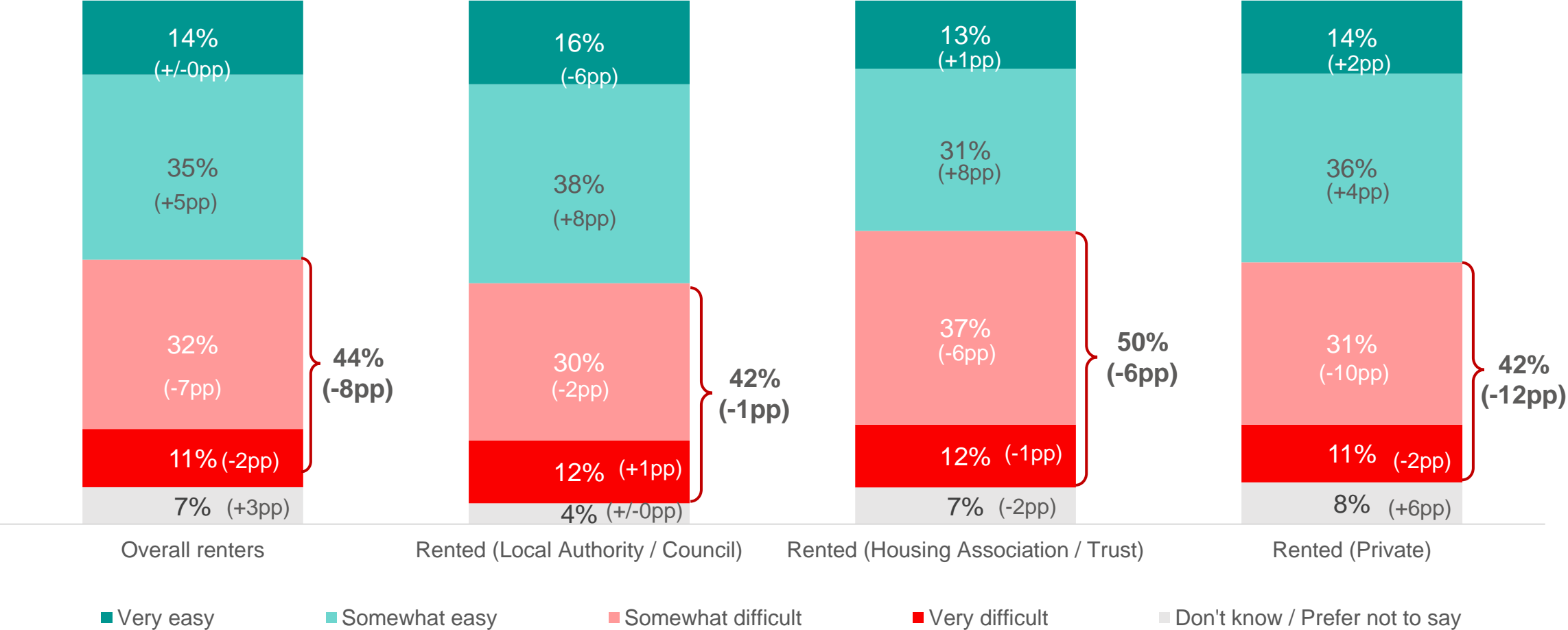
% who are significantly more likely to find it difficult to afford rent compared to the GM average (50%):

- Those with low levels of life satisfaction (66%)
- Those who look after their home / are homemakers (65%)
- Asian or Asian British respondents (64%)
- Those unable to save money in the next 12 months (62%)
- Those earning up to £10,399 (60%)
- Those who do not feel that their life is worthwhile (60%)
- Parents (59%) including those with children aged 5-15 years old (59%)
- Those suffering from mental ill health (58%)

*subgroup analysis uses S7-9 data

Renters are generally less likely to find it difficult to afford rental costs, no matter the **type of tenancy**, compared to July – though generally around 2 in 5 are still finding these payments difficult

Ease of affording rent or mortgage payments

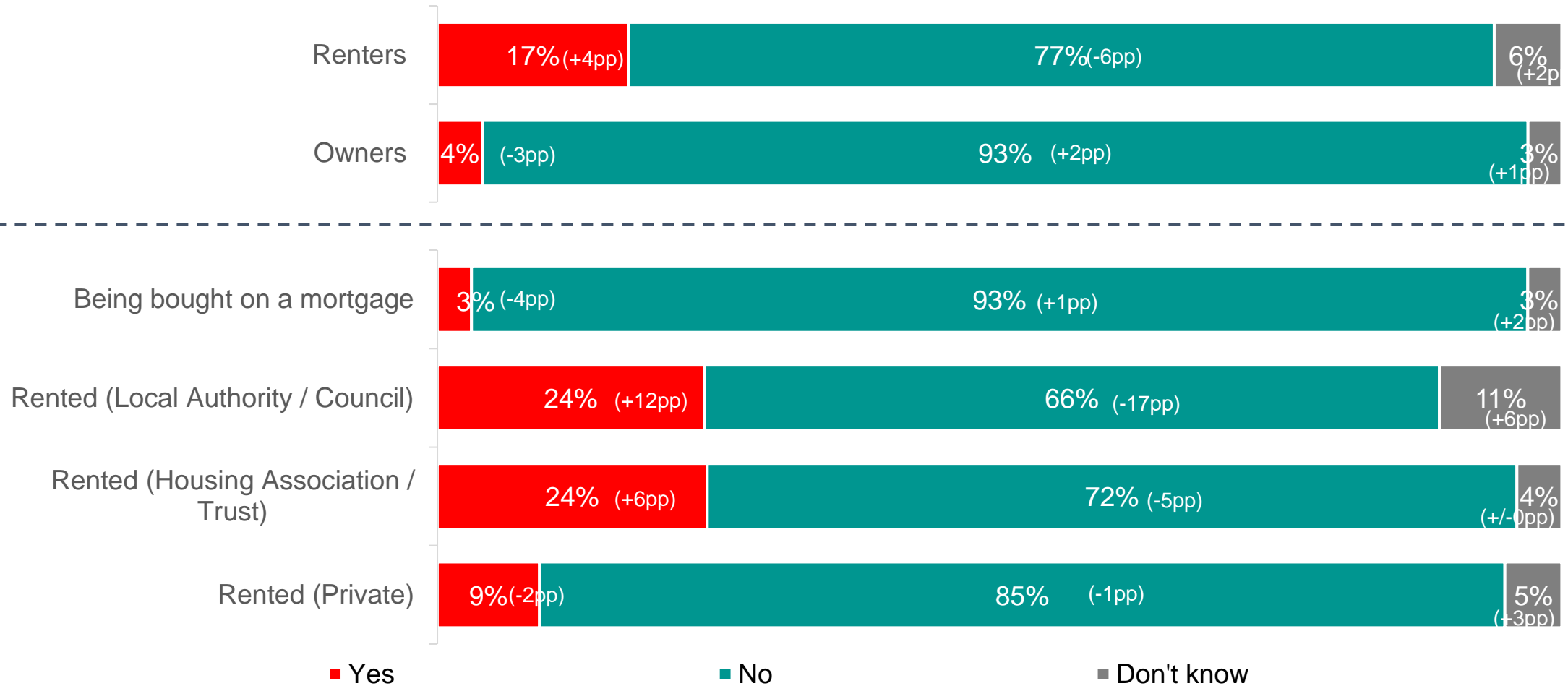


Figures in brackets show change since July (S8)

(Results may be being impacted by a large difference between the proportion of respondents answering "don't know")

Although the proportion of renters saying in broad terms that they find their payments difficult has fallen since July, there has been an increase in those saying they are **behind on their rent** (17%, was 13%). This is driven by increases in those renting from local authorities or housing associations who are now behind on their rent.

Are you behind on rent or mortgage payments?



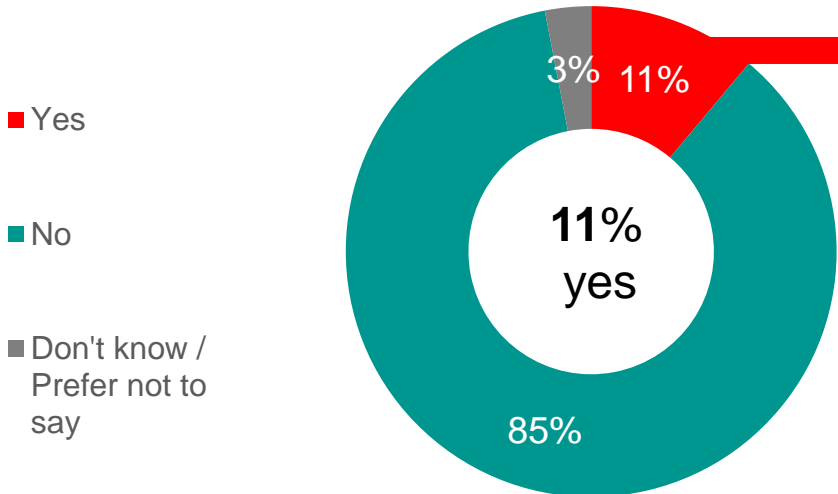
Figures in brackets show change since July (S8)

CL6A. Are you behind on your rent or mortgage payments?

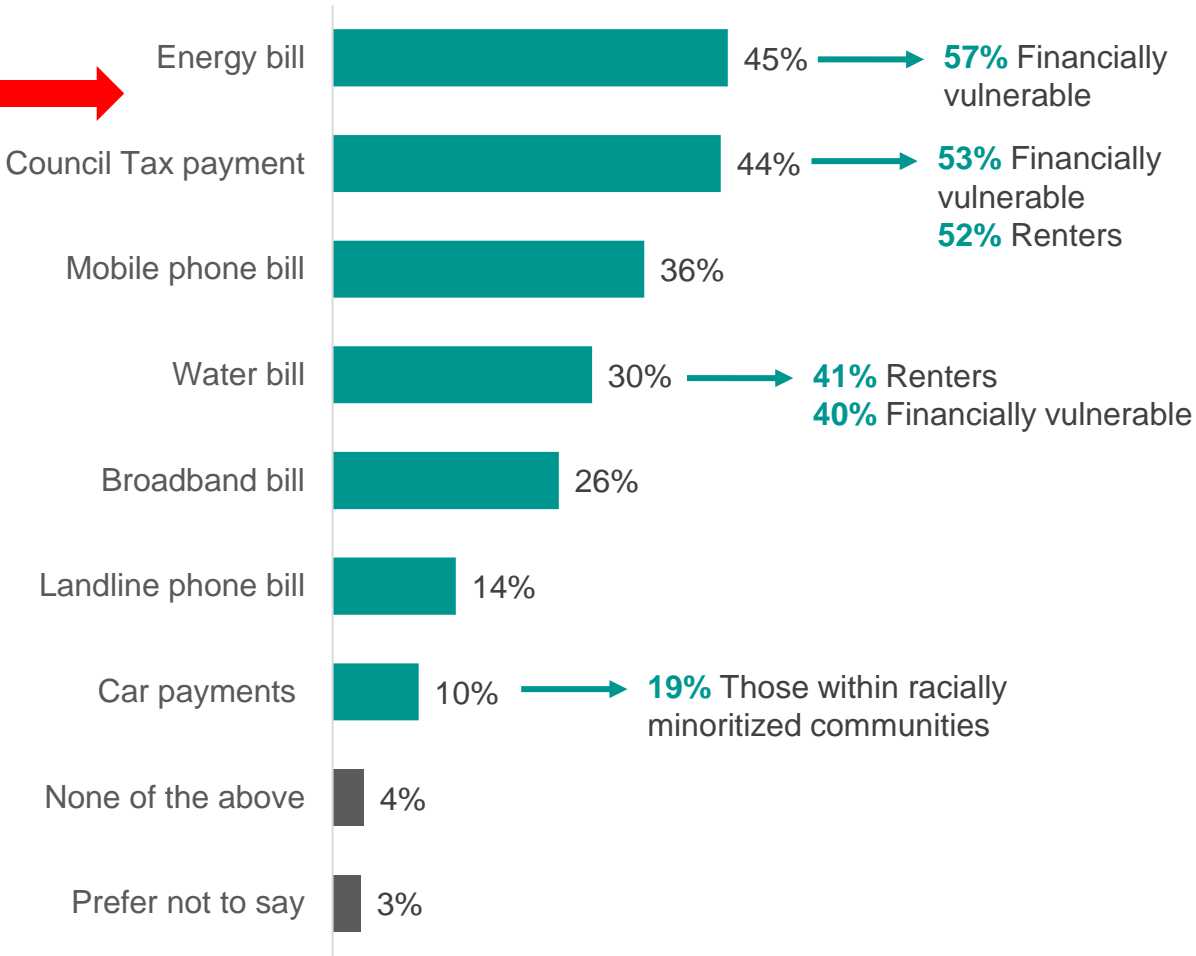
Unweighted base: 423 (Mortgage holders – all 'Being bought on a mortgage' and 'Shared ownership scheme'); 407 (Renters – all renting from 'Local Authority / Council', 'Housing Association / Trust' and 'Private'); 413 (Being bought on a mortgage); 105 (Rented (Local Authority / Council)); 121 (Rented (Housing Association/Trust)); 181 (Rented (Private))

1 in 10 (11%) respondents have missed or defaulted on household bills in the last month, with energy, council tax and mobile phone bills the most frequently going unpaid.

Have you missed or defaulted on your household bills in the last month?



Which household bills have you missed or defaulted on?



% more likely to have missed or defaulted on any bills compared to the GM average (11%): S9 only

Demographics:

- Those with a disability (23%) including those with mental ill health (31%)
- Those in Minority Ethnic Groups (21%)
- Those aged 16-24 (17%)

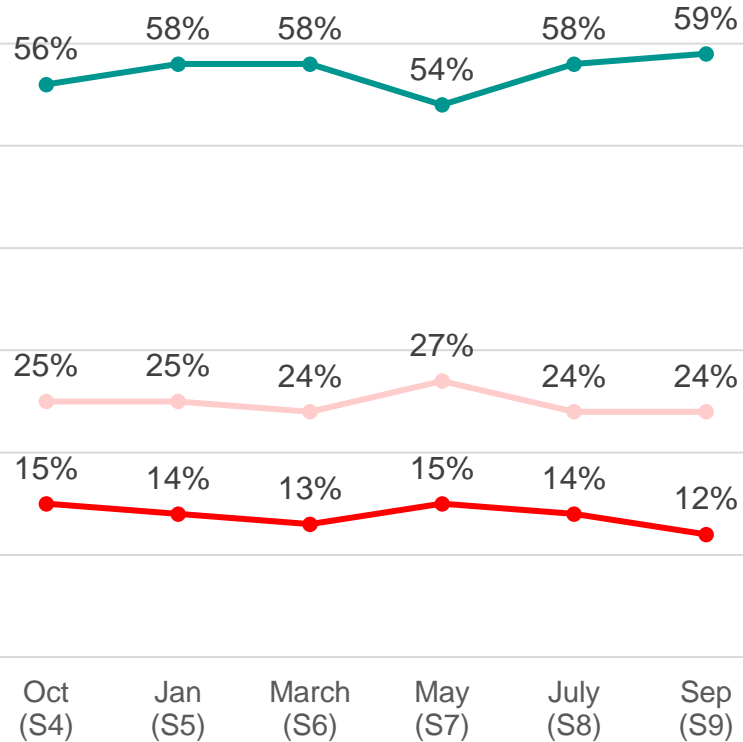
Individual and/or family circumstance:

- Those finding it difficult or are unable to manage their debt (46%)

CLAUG1. Have you missed or defaulted on any household bills in the last month? CLAUG2. Which of the following household bills have you missed or defaulted on?
Unweighted base: 1,560 (All respondents); 161 (All who have missed or defaulted on their bills in the last month)

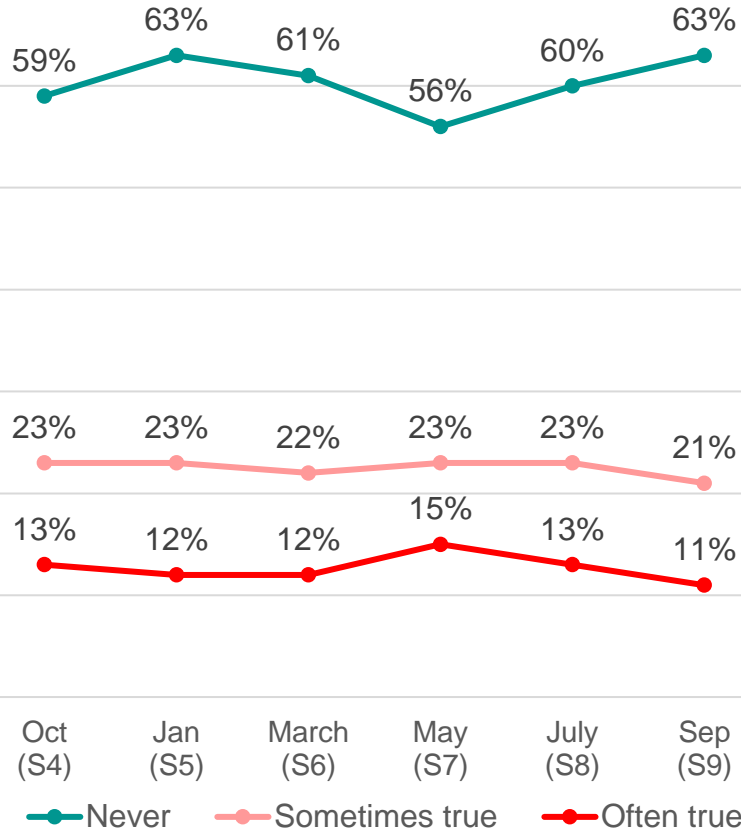
Summary: Food security

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



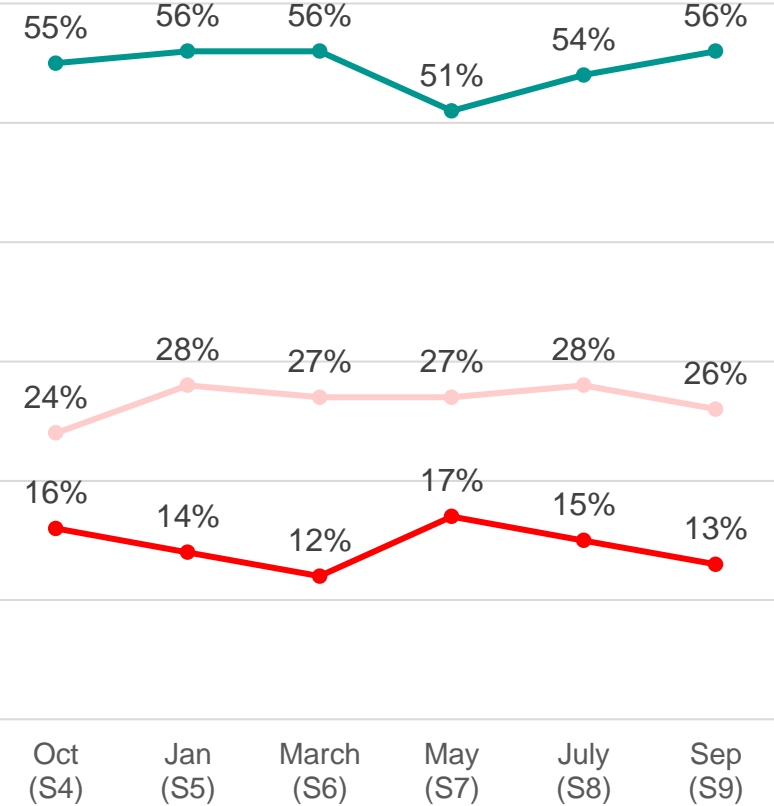
In the past twelve months have you...?

...found the food you bought didn't last and you didn't have money to get more



↑ ↓ Significantly higher/lower than the previous survey

...been unable to afford to eat balanced meals



Respondents experiencing food security challenges 'often' are quite low (between 10-20%) since October 2022, especially compared with other surveys over the past year. Similarly, respondents reporting having never experienced any issues are amongst the highest we have seen.

The full suite of food security questions will be reintroduced in S10/11, to generate our first full benchmarking of overall food security since S6 (March '23).

Gambling

Gambling key findings

[page 55](#)

Gambling detailed findings

[page 56-61](#)



Gambling– key findings

GAMBLING

- Almost 2 in 3 (64%) respondents have taken part in any form of gambling in the past 12 months.
- If the National Lottery draws and raffles are discounted, almost half of residents (46%) have taken part in gambling in the past 12 months.

REASONS FOR GAMBLING

- The most common reasons given for gambling are for enjoyment (45% of all, 53% with those who have only done lottery or raffles removed), to earn more money (26%, 27% not including lottery/raffles) and to pass the time / as a distraction (18%, 23% not including lottery/raffles)

FREQUENCY OF GAMBLING

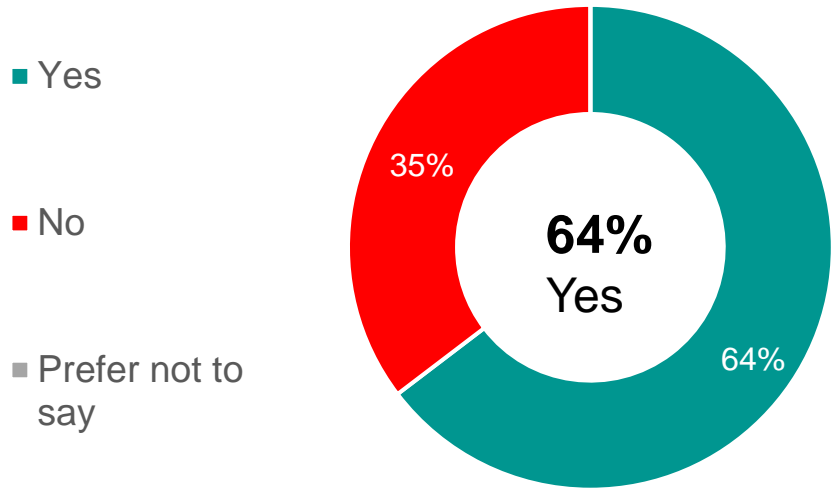
- Of the respondents who have gambled in the past 12 months, almost 6 in 10 have done so more often than once a month (58% of all, 59% not including lottery/raffles).
- This includes 28% who have done so once a week (25% not including lottery/raffles) and 17% more than once a week (20% not including lottery/raffles).

CHANGES IN GAMBLING HABITS DUE TO THE COST OF LIVING CRISIS

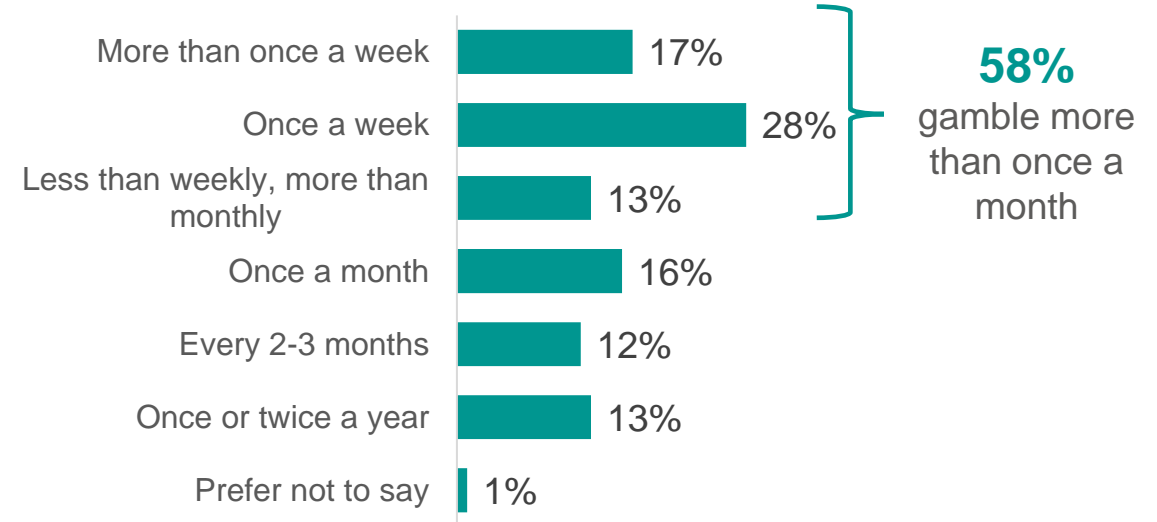
- Over half of those who gamble say that their gambling habits have stayed the same, regardless of the cost of living crisis (59% of all, 53% not including lottery/raffles).
- Around a quarter say that their gambling has decreased as a result of the cost of living crisis (25% of all, 28% not including lottery/raffles).
- 4% of those who gamble say they started as a result of the cost of living crisis (and 5% not including lottery/raffles). This rates is around double among those aged 16-24 (9% of all or not including lottery/raffles).
- 3% have stopped gambling as a result of the cost of living crisis (both including and not including lottery/raffles). This is three times higher among those in racially minoritised communities (10% of all, 9% not including lottery/raffles).

Summary: Gambling (all gambling activities)

Almost 2 in 3 (64%) of Greater Manchester residents have participated in some form of gambling in the past year



Among those who gamble, 3 in 5 (58%) are doing so more than once a month



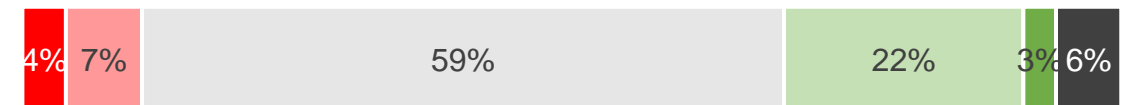
Those who gamble give the following as reasons why...*

45% because they enjoy it

26% because it's a way to make money

18% to pass time or as a distraction

1 in 5 (22%) say that their gambling has decreased as a result of the cost of living crisis

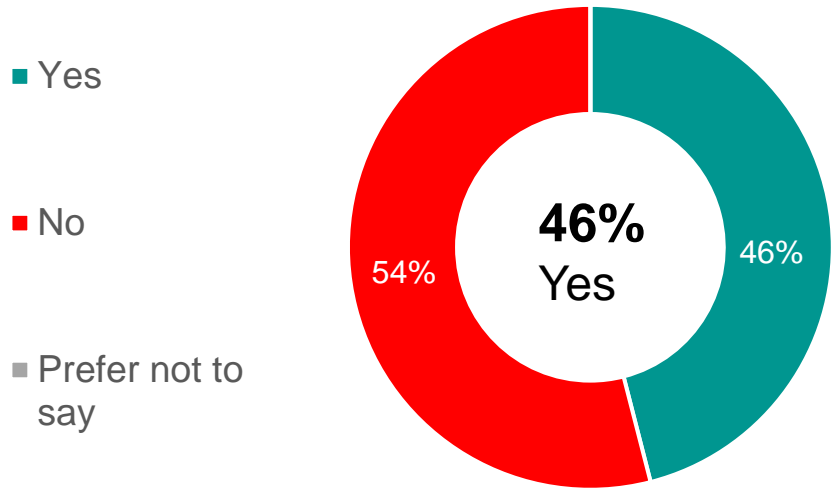


- I started gambling
- I gamble more
- My gambling has stayed the same
- I gamble less
- My gambling has stopped
- Don't know / Prefer not to say

All data is from September (S9). GA1. Thinking of the past 12 months, have you participated in any of the following forms of gambling? Unweighted base: 1560 (All respondents); GA2. What are your reasons for gambling? GA3. How often do you gamble? GA4. In what way, if any do you think your gambling has changed as a result of the cost of living crisis? 993 (All who have gambled in the past 12 months) *Question was multiple choice

Summary: Gambling (not including National Lottery draws and raffles)

Almost half (46%) of Greater Manchester residents have participated in some form of gambling in the past year, *excluding the National Lottery and raffles*



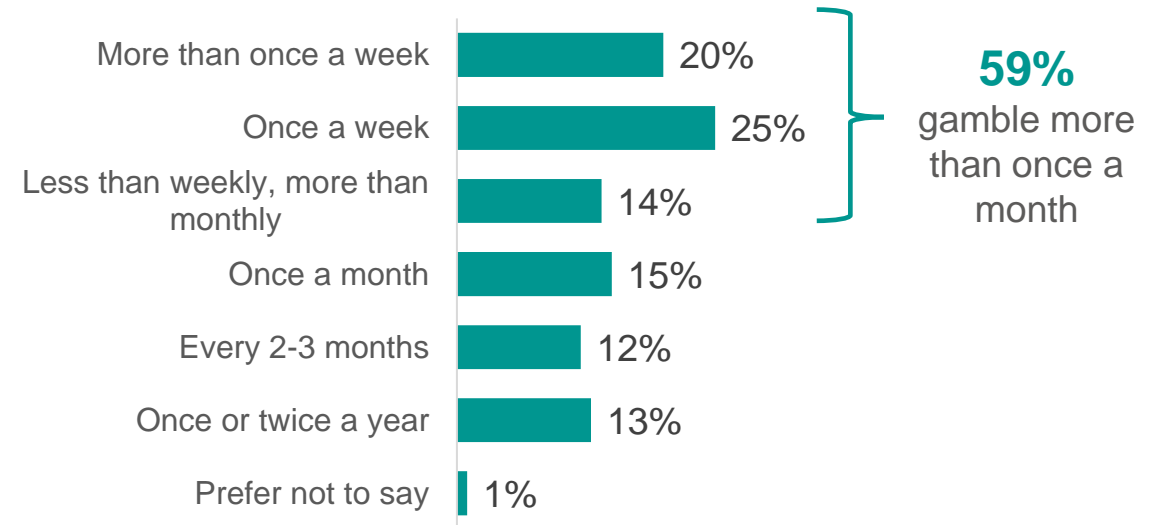
Those who gamble give the following as reasons why...*

53% because they enjoy it

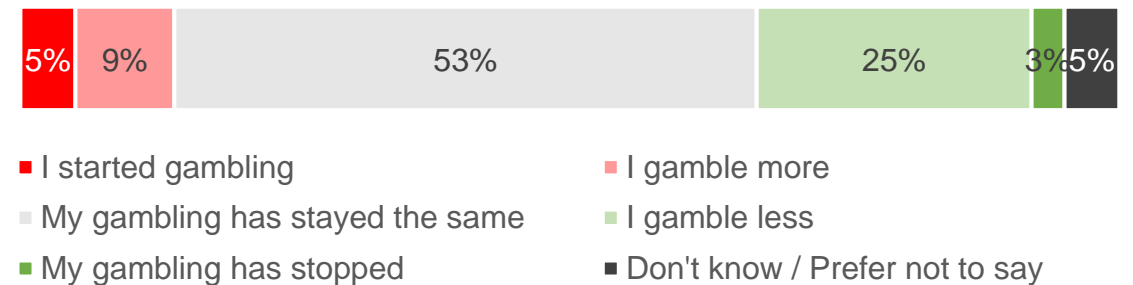
27% because it's a way to make money

23% to pass time or as a distraction

Among those who gamble, 3 in 5 (59%) are doing so more than once a month

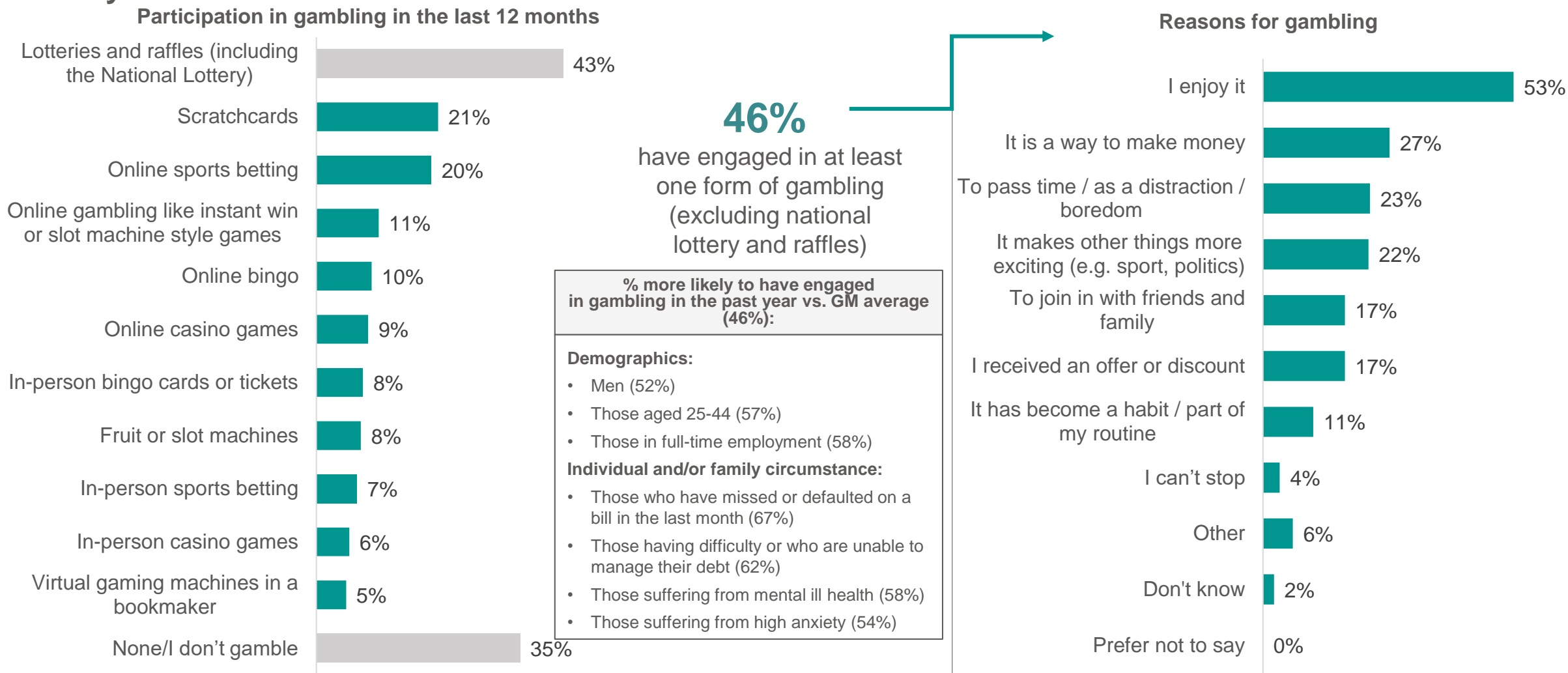


A quarter (25%) say that their gambling has decreased as a result of the cost of living crisis



All data is from September (S9). GA1. Thinking of the past 12 months, have you participated in any of the following forms of gambling? Unweighted base: 1560 (All respondents); GA2. What are your reasons for gambling? GA3. How often do you gamble? GA4. In what way, if any do you think your gambling has changed as a result of the cost of living crisis? 993 (All who have gambled in the past 12 months) *Question was multiple choice

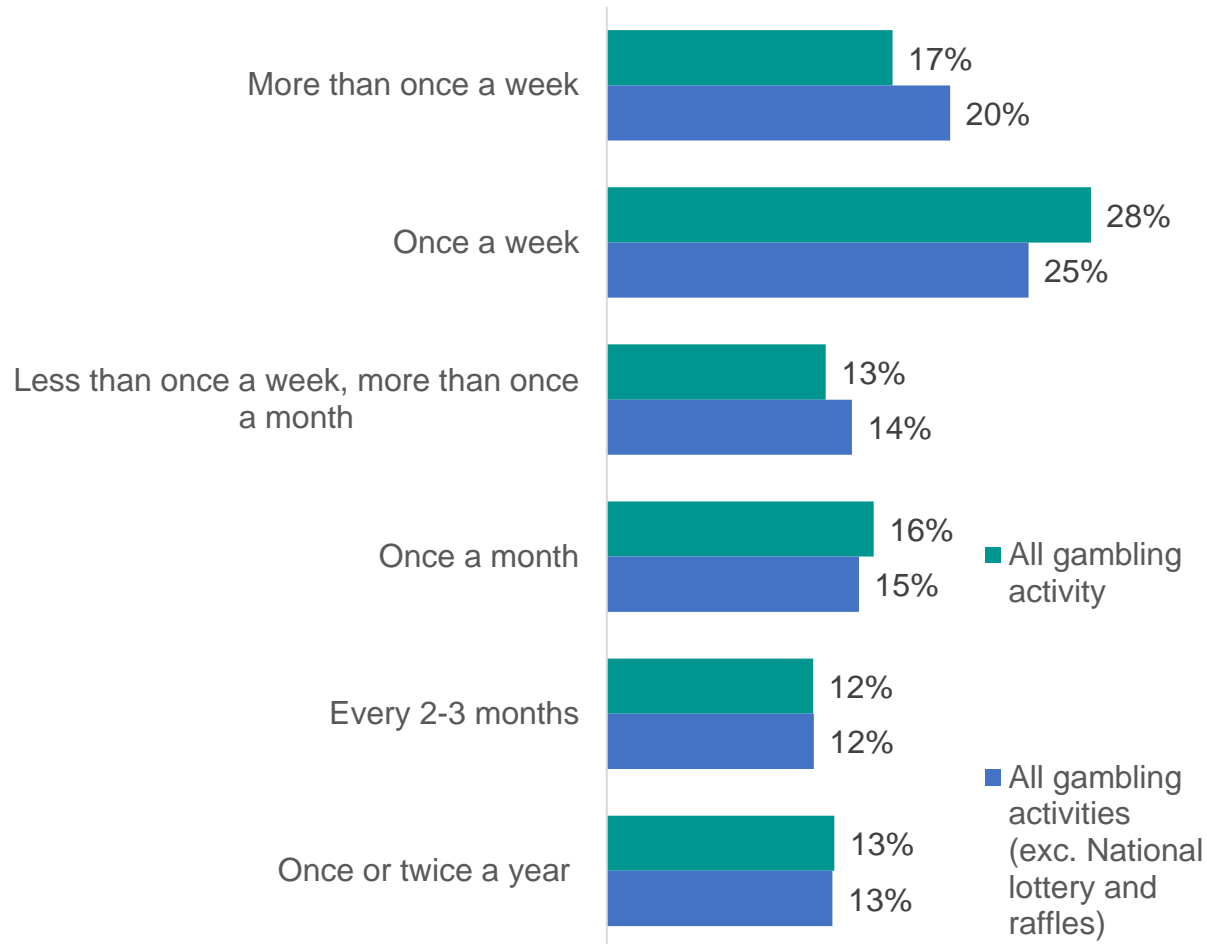
46% of respondents have participated in a form of gambling (excluding national lottery and raffles) in the past 12 months. While respondents are most likely to say this is for enjoyment, incidence of gambling is significantly higher amongst those who are having financial difficulties or suffering from anxiety



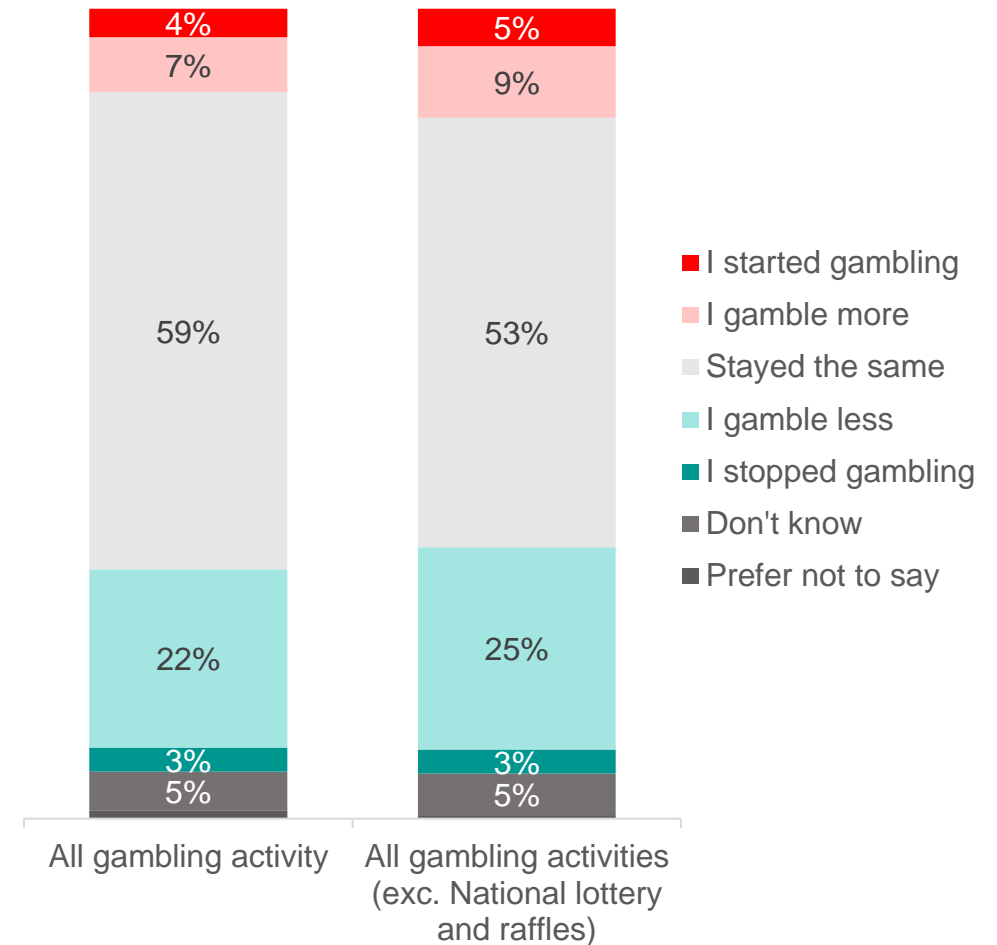
Note: Participants could select multiple activities

The majority of those who gamble do so less than once a week, however around 1 in 5 do so more than once a week. Most haven't changed this frequency as a result of the cost of living crisis, though 1 in 4 of those who gamble (excluding the national lottery and raffles) are now doing so less often

Gambling frequency



Change in gambling habits due to the cost of living crisis

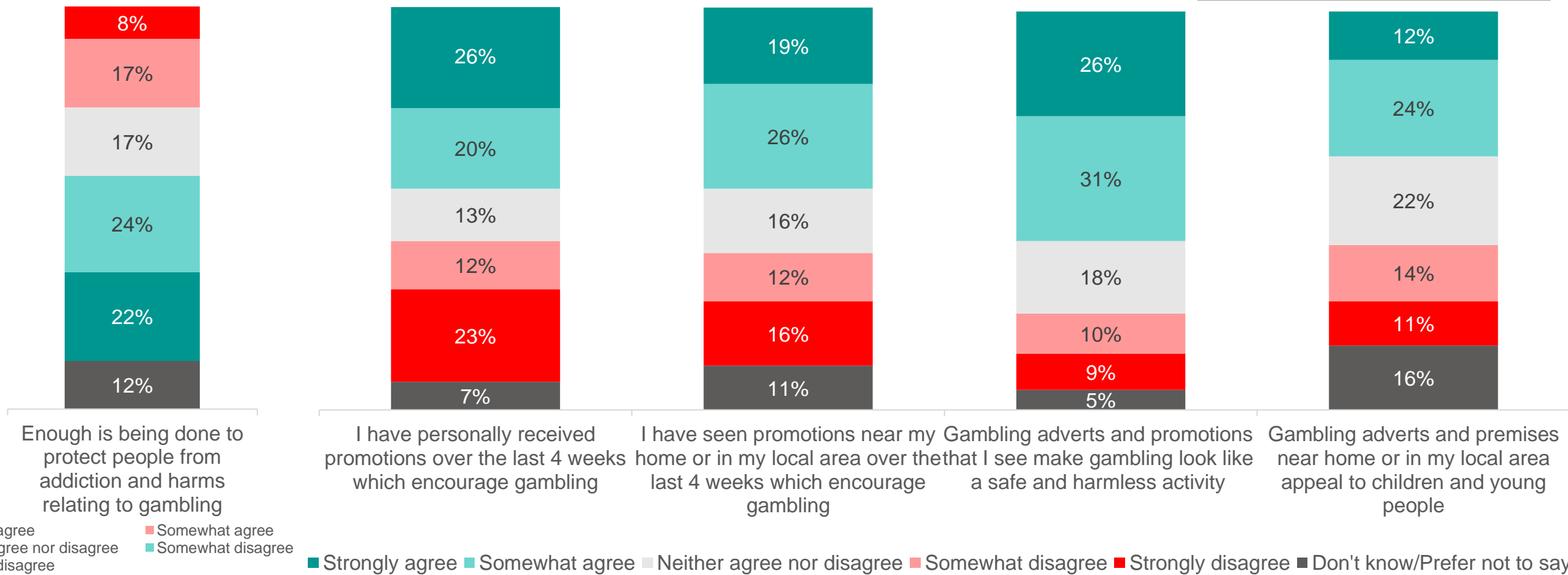


Over 2 in 5 respondents say they have personally received gambling promotions over the last month (45%) or seen them in their local area (45%) – those aged 25-44 (54%) and those who suffer from high anxiety (54%) are more likely to have personally received promotions

% who have personally received gambling promotions in the last month vs. GM average (45%):

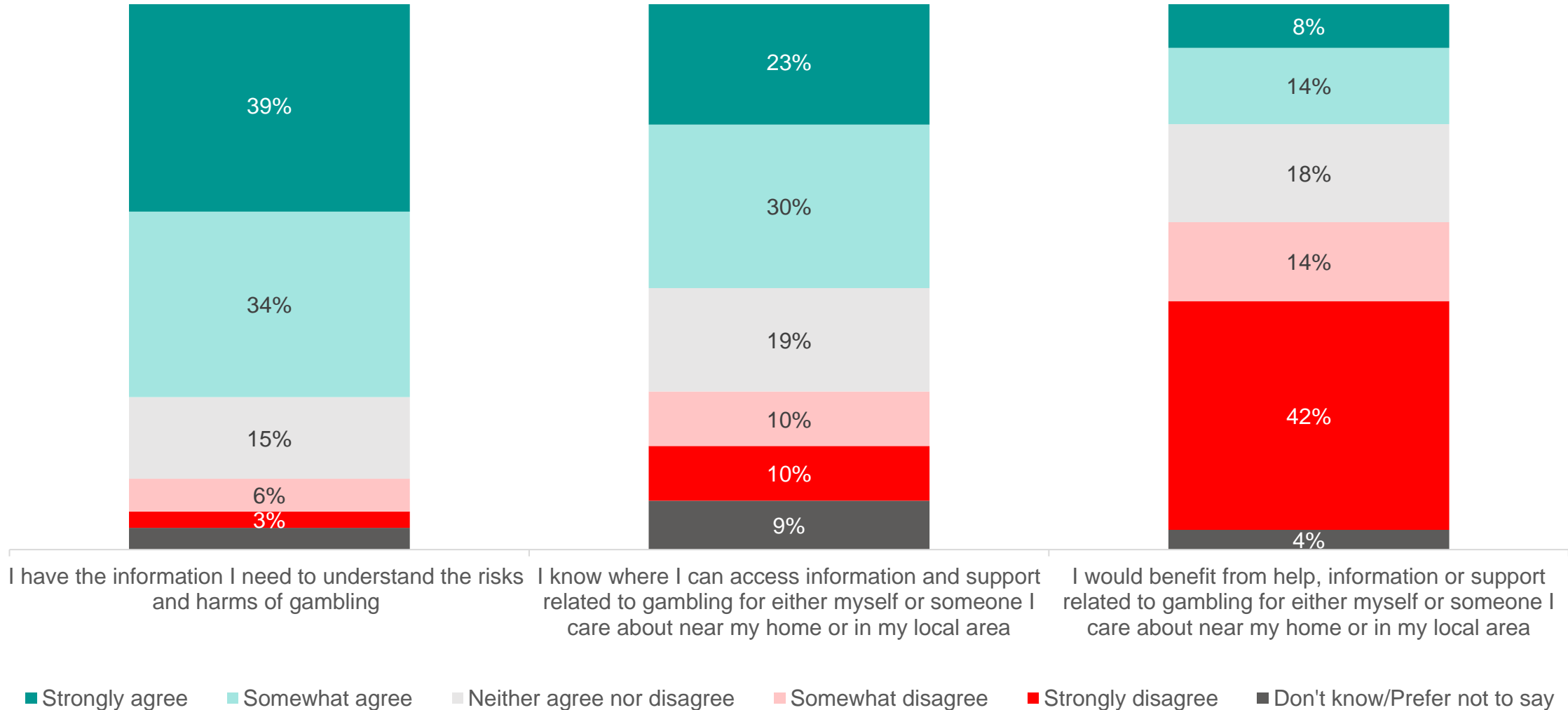
- Those aged 25-44 (54%)
- Those suffering from high anxiety (54%)

Awareness of gambling promotions and adverts



The majority of gamblers say they have the information they need to understand the risk of gambling (73%) and know where they can access information and support on it (53%)

Awareness of gambling support (amongst all who gamble)



Digital inclusion

(Findings from Autumn 2022 and Spring 2023 surveys merged into groups of three waves, telephone samples only)

Overview and context

[page 63](#)

Digital inclusion key findings

[pages 64-65](#)

Digital inclusion detailed findings

[page 66-73](#)

Digital inclusion – context

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

The reporting includes a particular focus on over 75 year olds, under 25 year olds, and disabled people – as priority groups for Greater Manchester activity to address digital exclusion.

Although early waves included digital inclusion questions for all survey respondents, we have taken the decision that digital inclusion questions are only asked in telephone samples (and not of respondents taking part in the survey online, who are therefore less likely to be digitally excluded than the population as a whole). This provides a sample of around 250 responses per survey.

For this report, we have merged findings for survey 9 (September 2023) with those from survey 7 and survey 8 (May 2023, July 2023) to provide a robust sample size for sub-group analysis.

Our reporting convention going forwards, from this wave (9) onwards, will be to report headlines based on the most recent three waves combined, with careful analysis of individual differences between waves where appropriate.

Digital inclusion – key findings (1)

AROUND A THIRD EXPERIENCE DIGITAL EXCLUSION (May, July and September combined data)

- Around 1 in 3 (32%) respondents said that their household experienced some form of digital exclusion
- Almost 1 in 5 (17%) Greater Manchester households experience a single aspect of digital exclusion and 1 in 50 (2%) are likely to experience all five aspects of digital exclusion.

PRIORITY GROUPS (May, July and September combined data)

- Disabled and older residents are more likely to experience some form of digital exclusion (figures compare to 32% in overall population):
 - Around 3 in 5 (62%) of those aged 75+ experience at least one aspect of digital exclusion
 - 2 in 5 (40%) of disabled people experience at least one aspect of digital exclusion
 - Around 3 in 10 (28%) aged 16-24 experience at least one aspect of digital exclusion

CONFIDENCE USING DIGITAL SERVICES (May, July and September combined data)

- Around 1 in 6 (16%) respondents say either they (8%) or someone in their household (12%) is not confident using digital services online
 - This proportion is also higher among older cohorts aged 75+ (41%) and disabled respondents (27%)
-

Digital inclusion – key findings (2)

MONTH-BY-MONTH TRENDS

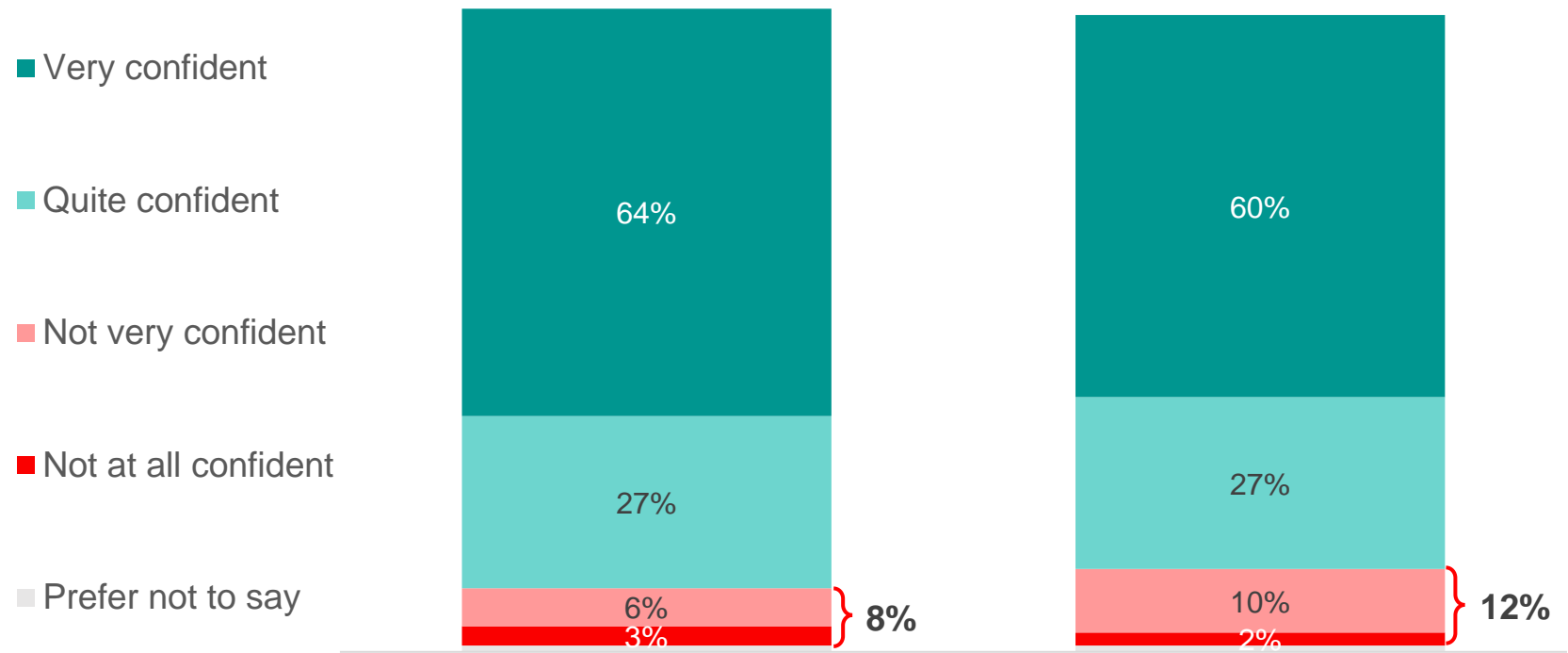
- Rates of digital exclusion appear to be gradually decreasing, with over 7 in 10 respondents (71%) saying they experience no aspects of digital exclusion in September (was 69% in July and 64% in May)
- This appears to be driven by reductions in those who experience 4 aspects of digital exclusion, or those who are completely digitally excluded. This could suggest that those who have previously been digitally excluded are in fact being able to access more digital resources through skills, connectivity, support or devices

LONG TERM TRENDS

- Overall levels of digital exclusion have generally decreased since Autumn 2022, with 32% experiencing at least one aspect of digital exclusion in surveys 7-9, dropping from 36% in surveys 3-6
 - The proportions of those aged 75+ or who are disabled and experience at least one aspect of digital exclusion have fallen significantly since Autumn
 - In surveys 3-6, 71% of those aged 75+ experienced at least one aspect of digital exclusion. This has fallen to 62%
 - In surveys 3-6, 54% of disabled respondents experienced at least one aspect of digital exclusion. This has fallen to 40%
 - Digital exclusion appears to have remained in line for those aged 16-24 (28% cf. 29% in surveys 3-6)
-

Less than 1 in 10 (8%) respondents say they themselves are **not confident using digital services online**, with more (12%) saying there are others in their house who are not confident. Those more likely to say they are not confident are aged over 75, in single person households, or disabled

How confident are you in using digital services online? (May – Sept 2023)



16% of all households have someone who is not confident in using digital services online

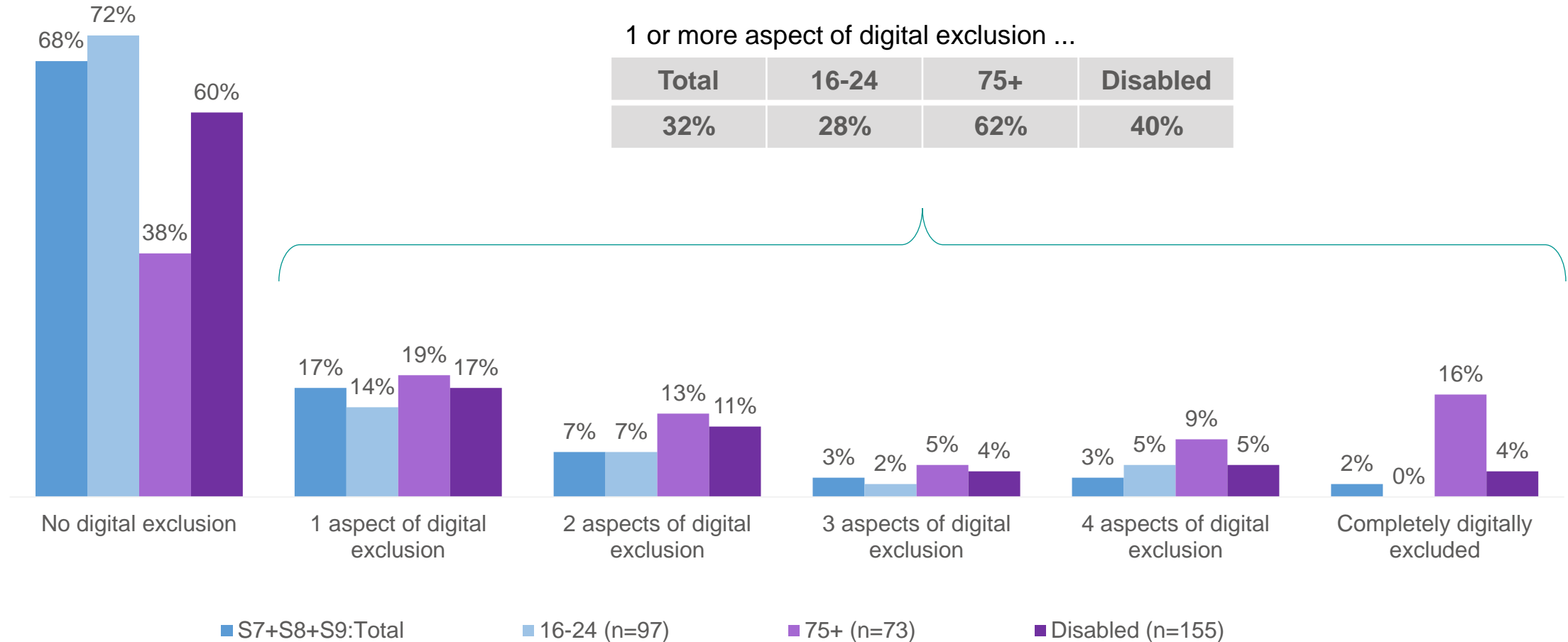
Respondents or someone in their household in the telephone sample more likely to be not very/not at all confident in using digital services online (vs. 16% GM average):

- Demographics:**
- Those aged 75+ (41%)
 - Those aged 65+ and living alone (41%)
 - Retired respondents (32%)
 - Disabled respondents (27%), including those with a mobility disability (37%)
- Individual and/or family circumstance:**
- Those earning up to £15,599 (28%)
 - Those finding it difficult to afford their energy costs (20%)

DI10. Overall, how confident is your household in using the digital services online that it needs and wants? Unweighted base: 749, Survey 7, 251, Survey 8, 250, Survey 9, 248 (Telephone respondents)

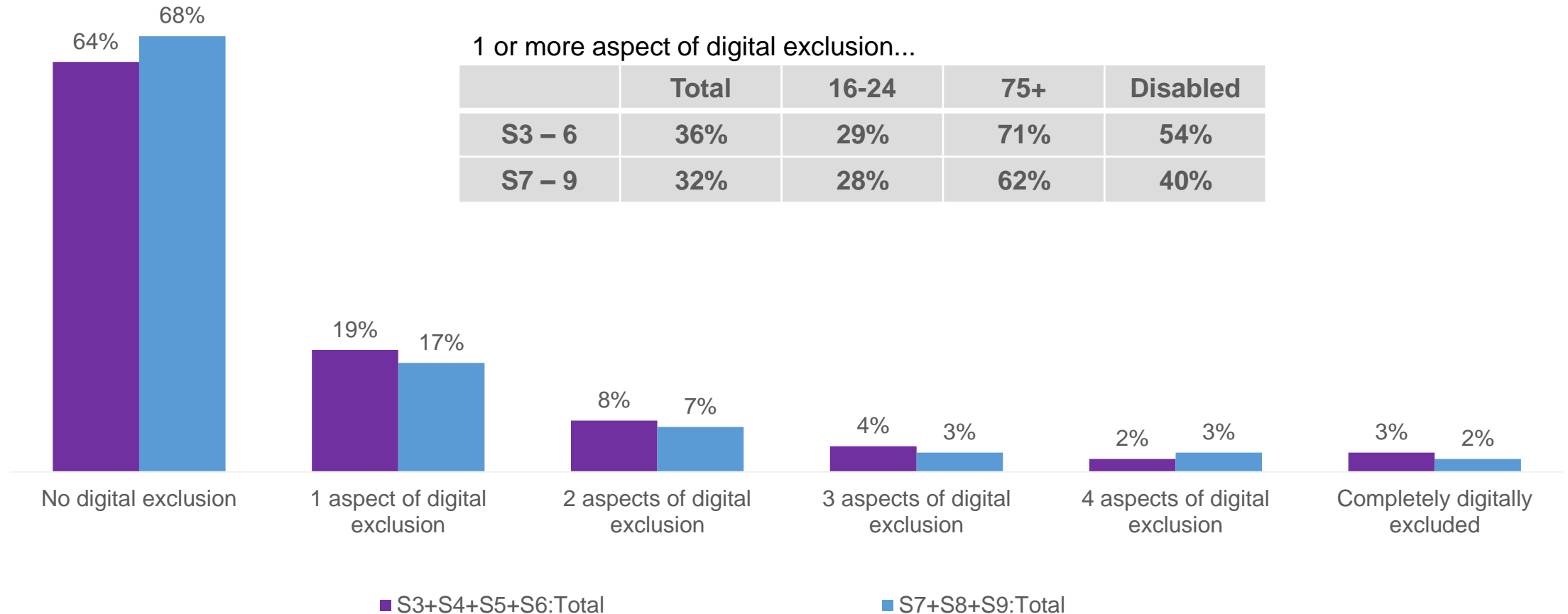
Just under a third of respondents (32%) experienced **at least one aspect of digital exclusion**. This rises to 2 in 5 (40%) of disabled respondents and 6 in 10 (62%) of those aged over 75

Number of aspects of digital exclusion experienced (May – Sept 2023)



Since Autumn 2022, it appears that the proportion of those experiencing **multiple aspects of digital exclusion** has generally decreased, as has the number of older respondents and those with a disability

Number of aspects of digital exclusion experienced
Autumn 2022 vs. Summer 2023



1 or more aspect of digital exclusion...

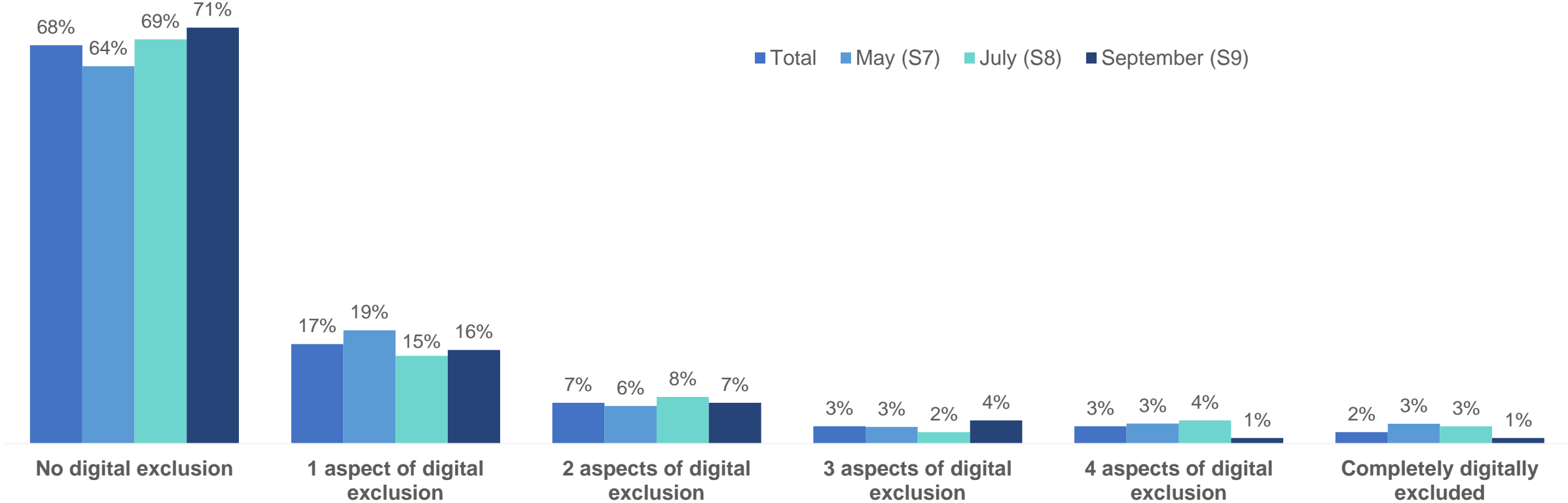
	Total	16-24	75+	Disabled
S3 – 6	36%	29%	71%	54%
S7 – 9	32%	28%	62%	40%

D111. How often...? Unweighted base: 1005, S3-6* No data available for S4+S5+S6 due to a CATI weighting error. Approach comparisons with caution due to differing bases; 749, S7-9 (Telephone respondents) Prefer not to say not shown. Question in S6 + S7 + S8 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

Summary: Digital Inclusion

Wave 9 (September) results continue to show a favourable picture of digital inclusion, when compared to results from May (and earlier and in the Spring) – 71% of respondents report no issues with digital inclusion, a further increase from Wave 8

Number of aspects of digital exclusion experienced**

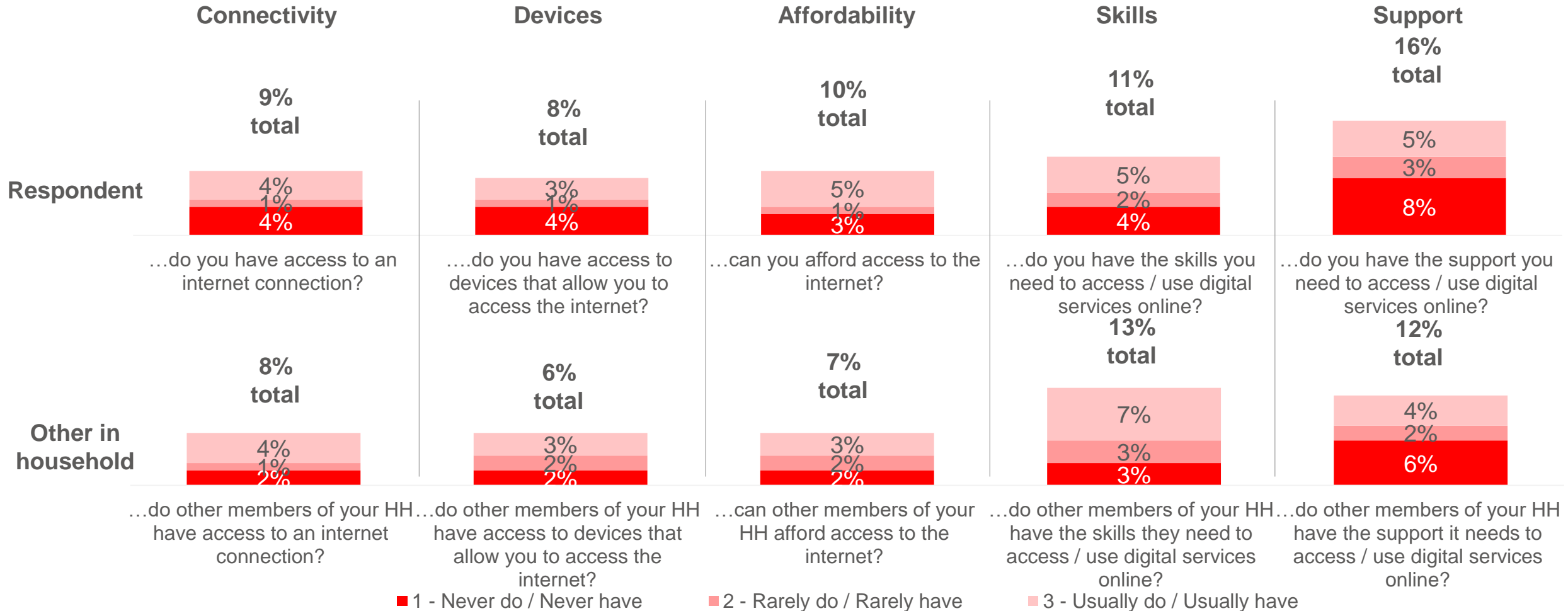


↑↓ Significantly higher/lower in previous survey

Unweighted base: Total, 749; Survey 7, 251, Survey 8, 250, Survey 9, 248 (Telephone respondents) **Aspects of digital exclusion = consistent and reliable access to an internet connection at home; to devices that allow access to the internet; affording access to the internet; skills needed to access and use digital services online; support needed to access and use digital services online

Where respondents are experiencing digital exclusion, they are most likely to say this is due to a **lack of skills or support** to allow them to access digital online services

How often...? (Respondents reporting digital exclusion)*
(May – Sept 2023)



DI_11. How often...? Unweighted base: 749, Survey 7, 251, Survey 8, 250, Survey 9, 248 (Telephone respondents) *Prefer not to say, 4, and 5 not shown.

Those aged 75+ are consistently 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)
July – September 2023

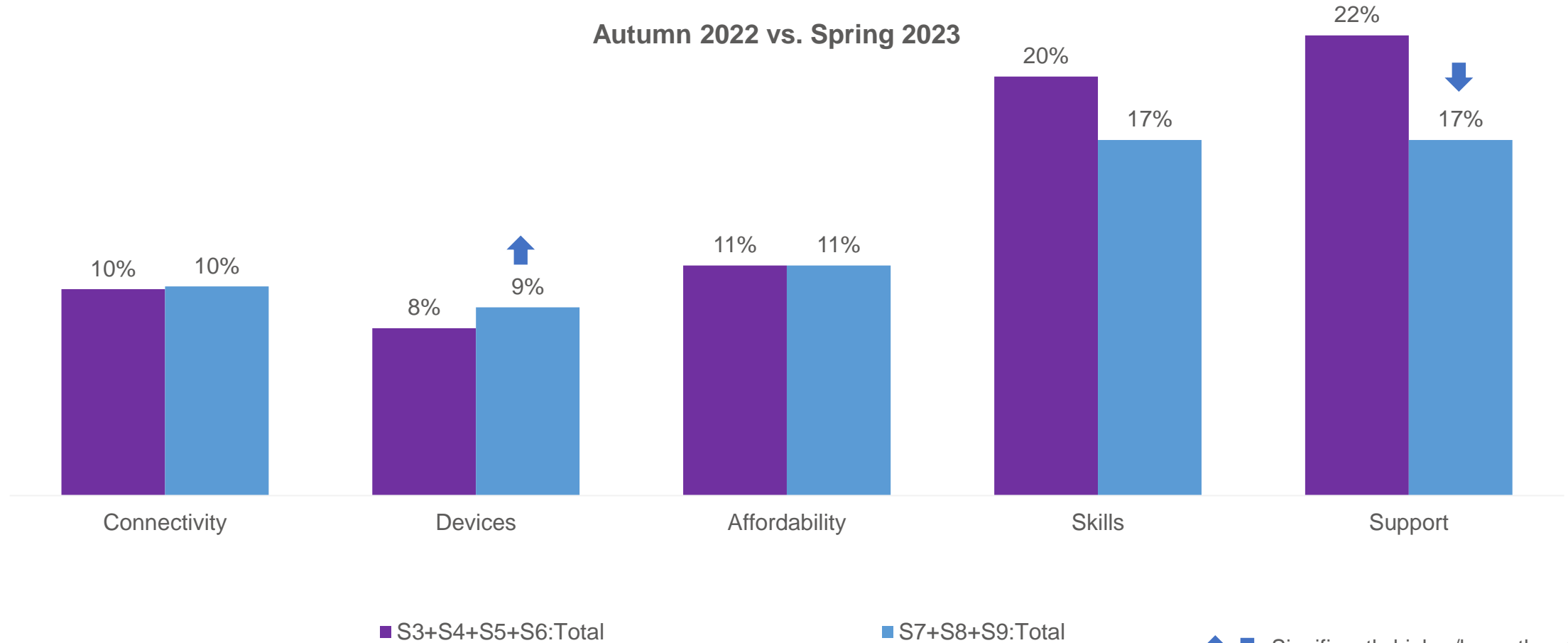
	Total	Aged 16-24 (n=97)	Aged 75+ (n=73)	Disabled respondents (n=155)
...have consistent and reliable access to an internet connection at home?	10%	6%	29% ↑	13%
...have consistent and reliable access to devices that allow access to the internet and use digital services online?	9%	7%	36% ↑	14% ↑
...can afford access to the internet?	11%	12%	31% ↑	15%
...have the skills they need to access and use digital services online?	17%	16%	46% ↑	25% ↑
...have the support needed to access and use digital services online?	17%	11%	34% ↑	21%

↑ ↓ Significantly higher/lower than total

There has been a significant **decrease in digital exclusion** between autumn 2022 and summer 2023 in respondents not having the support required to get them online (22% vs 17%)

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

Autumn 2022 vs. Spring 2023



Around 1 in 6 (17%) households **use digital services**, but want to use them more. Just 1% of people who do not use digital services online want to be able to do so.

Current and intended future use of digital services online (July – September 2023)

