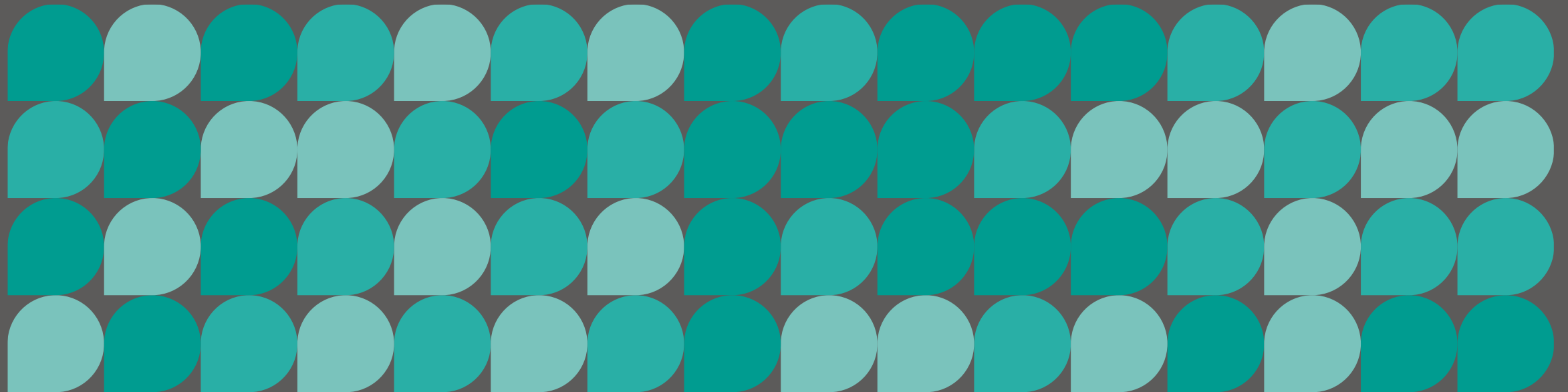


Greater Manchester Residents' Survey

Survey 12 (main report)

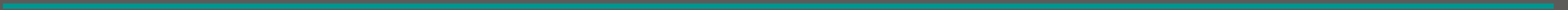
June 2024

Fieldwork conducted 13th – 25th May 2024



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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 13th and 25th May 2024, with a representative sample of 1,551 residents** from across all ten Greater Manchester local authority areas.
 - The report is divided into themed sections, providing an overview into **respondents' feelings and behaviours around personal health and wellbeing, healthy homes, satisfaction with their local area, costs of living and digital access**.
 - Data from May 2024 (survey 12) is presented alongside that from similar Greater Manchester resident surveys undertaken in February 2024 (survey 11) and November 2023 (survey 10). 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
 - healthy homes – merged data from surveys 10, 11 and 12 is shown
 - local area – data from individual surveys is shown separately, except when commenting on trends for specific sub-groups or districts
 - cost of living – data from individual surveys is shown separately
 - digital inclusion – merged data for surveys 10+11+12 is used, drawing on telephone (10 + 11) and face-to-face (survey 12) responses only
 - To provide a national comparison, where available, **Greater Manchester findings are presented alongside the most recent benchmarking data from relevant national surveys** – for example, published figures from the Office for National Statistics (ONS) and the Department for Culture Media and Sport (DCMS).
 - These surveys are intended to provide regular ongoing insights for Greater Manchester organisations and partners to help inform how and where to target support, communications / engagement activities and resources to improve the lives of Greater Manchester residents.
-



Methodology

- Between February 2022 and May 2024, BMG Research has undertaken twelve surveys, each comprising circa 1,500 residents from across Greater Manchester.
- In surveys 1 to 11 the sample was comprised of approximately 750 online panel respondents, 250 telephone respondents, and 500 online 'river sampled' respondents (those who responded to adverts, offers and invitations to take part in the surveys).
- **This wave, the methodology for the resident's survey has changed.** The sample for this wave includes around:
 - 750 online panel respondents
 - 500 online rapid respondents, and
 - 250 face-to-face respondents
- This mix of majority online sampling with a smaller face-to-face element has been selected so that the most representative and robust sample of Greater Manchester residents can be regularly sourced within available time and budget. **One of the main reasons the face-to-face element is included is so that those without internet access can take part in the survey. It has replaced the previous telephone approach because analysis suggests those who are truly digitally excluded are less likely to be able to take part on the phone.***
- This new methodology will remain consistent for the duration of 2024/25. See Appendix for more details.
- Each survey is designed to take **15 minutes** on average for respondents to complete; however, due to the emotive nature of some topics covered, 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 of wider protected and key characteristics.
- **Weights** have been applied to the data gathered to ensure the sample matches the population profile by age, gender, ethnicity, disability and locality, and to ensure consistency between individual surveys.

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

Report contents and guidance

Identifying significant differences / change

- Where relevant, **differences in findings for specific demographic and other population characteristics compared to the Greater Manchester average** are 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.

Sample sizes

- 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 1,551 respondents in some instances. Where this is the case, this has been noted in the footnotes of each slide, along with the unweighted base sizes.

Language - inequalities

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

Health and wellbeing

Overview and context

[page 8](#)

Health and wellbeing key findings

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Health and wellbeing detailed findings

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Health and wellbeing – context

The Greater Manchester Residents' Survey investigates the four measures of personal wellbeing commonly asked in national surveys – life satisfaction, anxiety, happiness and feelings that things done in life are worthwhile. Up until April 2023 (survey 6), due to survey time constraints, questions were asked only on the first two of these measures; changes across the survey have more recently allowed us to make capacity for exploring wellbeing in broader terms. As this is now the sixth time that we have asked all four questions, findings in relation to wellbeing are becoming more robust at different spatial levels and for different sub-groups.

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

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

Health and wellbeing– key findings (1 of 2)

WELLBEING

- Life satisfaction and anxiety among respondents overall appear to be improving somewhat / on selected measures, when survey results are considered over an 18-month time horizon. For example, the proportion of respondents in the latest survey reporting 'low' levels of life satisfaction and 'high' levels of anxiety is below that typically reported in that time.
 - In the short term, wellbeing measures have remained broadly in line with February. This is particularly the case around life satisfaction (65% reporting 'very high' or 'high' satisfaction) as well as anxiety levels, with a quarter experiencing 'very low' levels of anxiety. However, some aspects of positive movement can be seen:
 - Those who feel 'low' satisfaction with their life has dropped slightly from 14% to 12%
 - Those experiencing high levels of anxiety has dropped 2pp to 36% from February
 - Those who feel the things they do in their life are worthwhile has remained at around two thirds (65%), while those reporting high levels of happiness is sitting slightly lower at 61%. Positively, those reporting 'low' levels of happiness has dropped from 16% in February to 14%
-

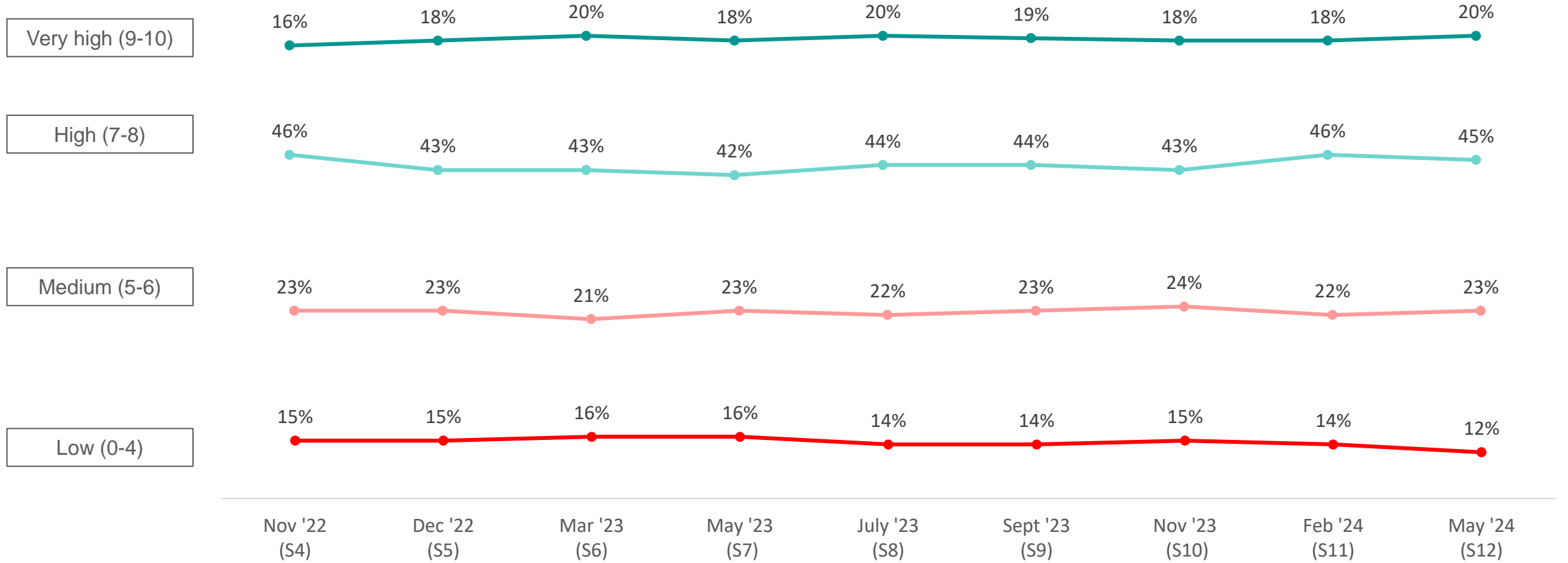
Health and wellbeing– key findings (2 of 2)

MANAGING YOUR OWN HEALTH

- A year on since the Health Confidence Score (HCS) was first included in the survey, latest results show a significant increase in the HCS from 70.5 to 72.1, and represent the highest HCS recorded since tracking began
 - This result represents a ‘moderate’ level of health confidence among Greater Manchester respondents. This has risen slightly since February, where the score was 71.4, and compares to a score of 70.0 back in November 2023
 - This increase in health confidence reflects movements in the underlying tracking measures as follows:
 - Over 9 in 10 (93%) respondents say that they are involved in decisions about their health – largely in line with February 2024 (was 90%) and a significant increase from November (was 89%)
 - There has been a slight increase in those agreeing that they can get the right help if they need it, with 75% agreeing (was 73% in February)
 - 84% agree that they can look after their health – the same as seen in February
 - 4 in 5 (80%) agree that they know enough about their health – no significant change since February (+1pp)
 - Disabled respondents are significantly more likely to respond negatively when asked about their health and wellbeing – reporting a lower health confidence score (64.7 compared to 72.1 for all respondents).
 - However, and importantly, this is the highest HCS recorded for disabled respondents, with growth in all areas since February 2024 apart from the “shared decisions” dimension. In May 2023, the HCS for this group was 60.5, +4pp lower than the latest score of 64.7
 - And in relation to the gap in HCS between disabled respondents and the sample as a whole, this gap has closed by 3.4 points (was 10, now 7.4). The area with the largest gap continues to be that around self-management (whole sample score is 71.4, disabled score is 60.5)
-

While **life satisfaction** has been broadly stable since February, over the long term it has improved - with very high satisfaction tracking in line with its highest level (equal with S8), and low satisfaction at its lowest level since tracking began

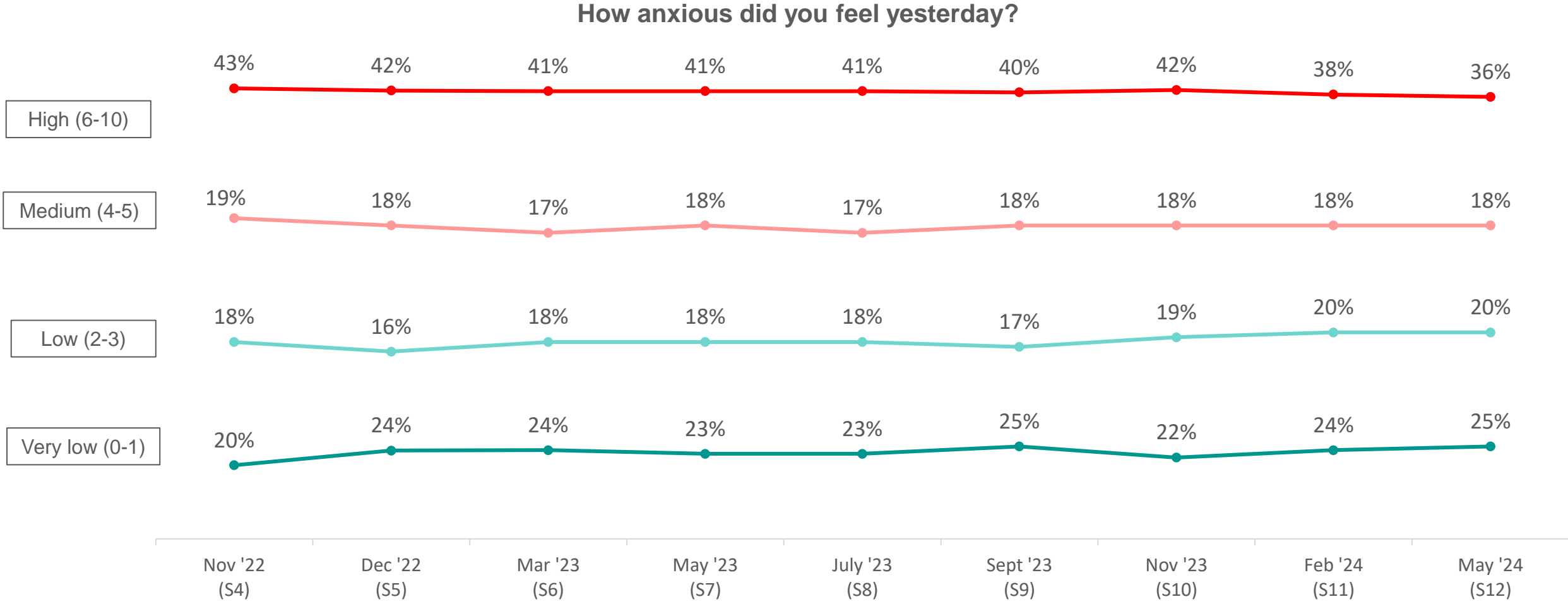
How satisfied are you with your life nowadays?



A1. Where 0 is “not at all” and 10 is “completely”...

Unweighted base: Greater Manchester Residents Survey 4: 1636; Survey 5: 1470; Survey 6: 1767, Survey 7: 1488, Survey 8: 1612, Survey 9: 1560, Survey 10: 1546, Survey 11: 1460, Survey 12: 1551

While not a significant change since February, levels of **anxiety** continue to improve in the long term, with 'high' levels of anxiety having fallen to their lowest point since tracking began, and 'low' levels reaching their highest (equal with survey results in September 2023)



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

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

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

Demographics:

- Those who are not heterosexual (22%)
- Those with a disability (27%), including those with mental ill health (40%), a learning disability (27%), a sensory disability (24%) or a mobility disability (23%)

Individual and/or family circumstance:

- Those who have a physical or mental health condition lasting longer than 12 months (24%)
- Those who do not think the things they do in their life are worthwhile (58%)
- Those with low levels of happiness (57%)
- Those who do not feel they can look after their own health (50%)
- Those not in work due to ill health or disability (43%)
- Those dissatisfied with their local area (32%)
- Those who would not recommend their local area as a place to live (28%)
- Those with high levels of anxiety (23%)
- Those who feel unable to save money in the next 12 months (21%)
- Those renting their home (21%) including renting from a Local Authority / Council (26%), a Housing Association / Trust (23%) or privately (18%)
- Those living in single person households (18%)

% who felt 'highly anxious' compared to GM average (39%) is higher among*:

Demographics:

- Female respondents (42%)
- Those aged 16-24 (48%) or 25-44 (45%)
- Respondents from Minority Ethnic Groups (46%), specifically those who are Black or Black British (52%)
- Those who are bisexual (54%)
- Those with a disability (55%) including those with mental ill health (72%), a learning disability (55%), a mobility disability (46%) or other disability (56%)

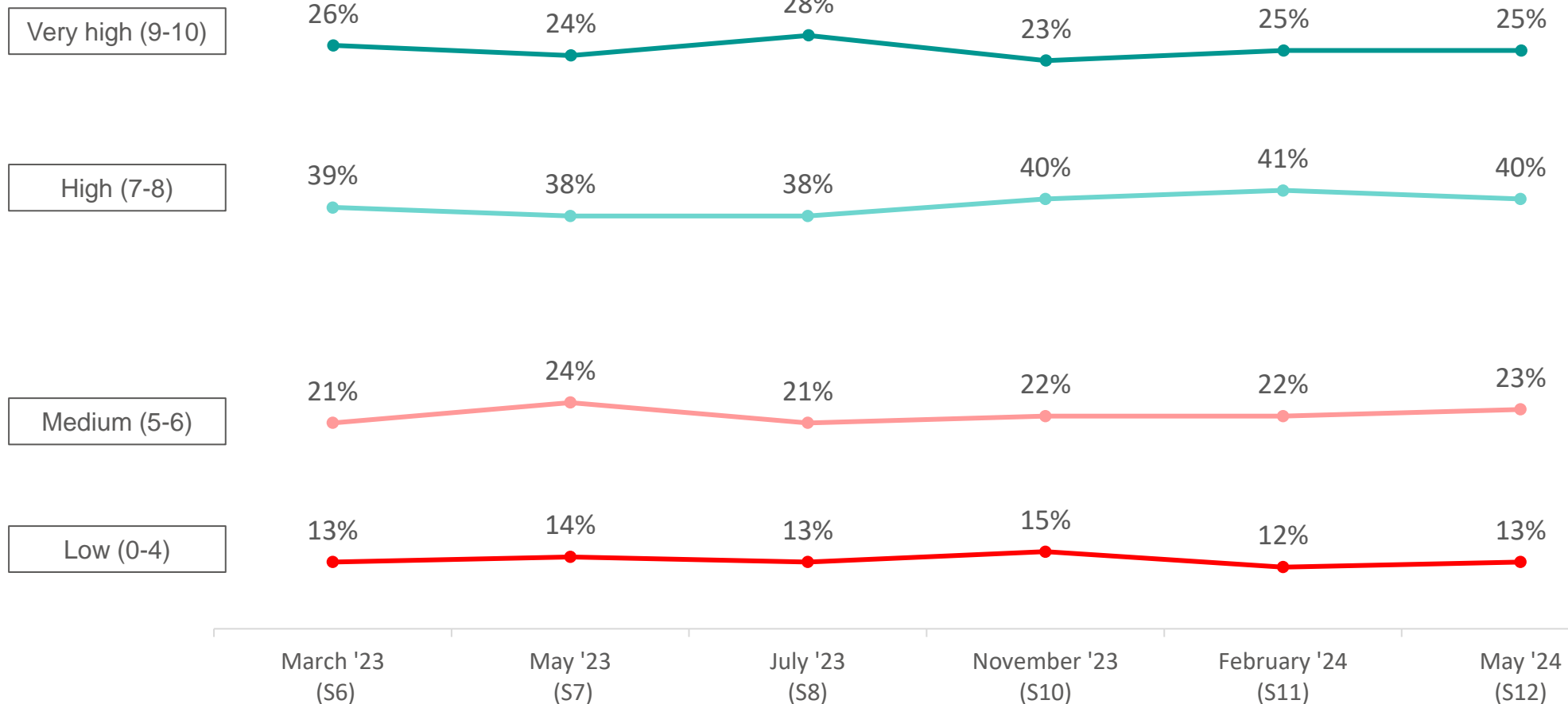
Individual and/or family circumstance:

- Those not in work due to ill health or disability (69%)
- Those with a physical or mental condition lasting longer than 12 months (51%), specifically those whose condition reduces their ability to do activities a lot (60%)
- Those earning up to £15,599 (50%)
- Those with children under 5 years old (49%)
- Those renting their home (46%) including from a Local Authority / Council (51%), or a Housing Association / Trust (45%)
- Those who currently have caring responsibilities (44%) or previously have (54%)

* Subgroup analysis uses merged data from S10, 11 and 12 combined

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

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



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

Demographics:

- Those who have a disability (23%), including mental ill health (38%), a mobility disability (19%) or sensory disability (22%)
- Those who are not heterosexual (21%)
- Those aged 16-24 (19%)

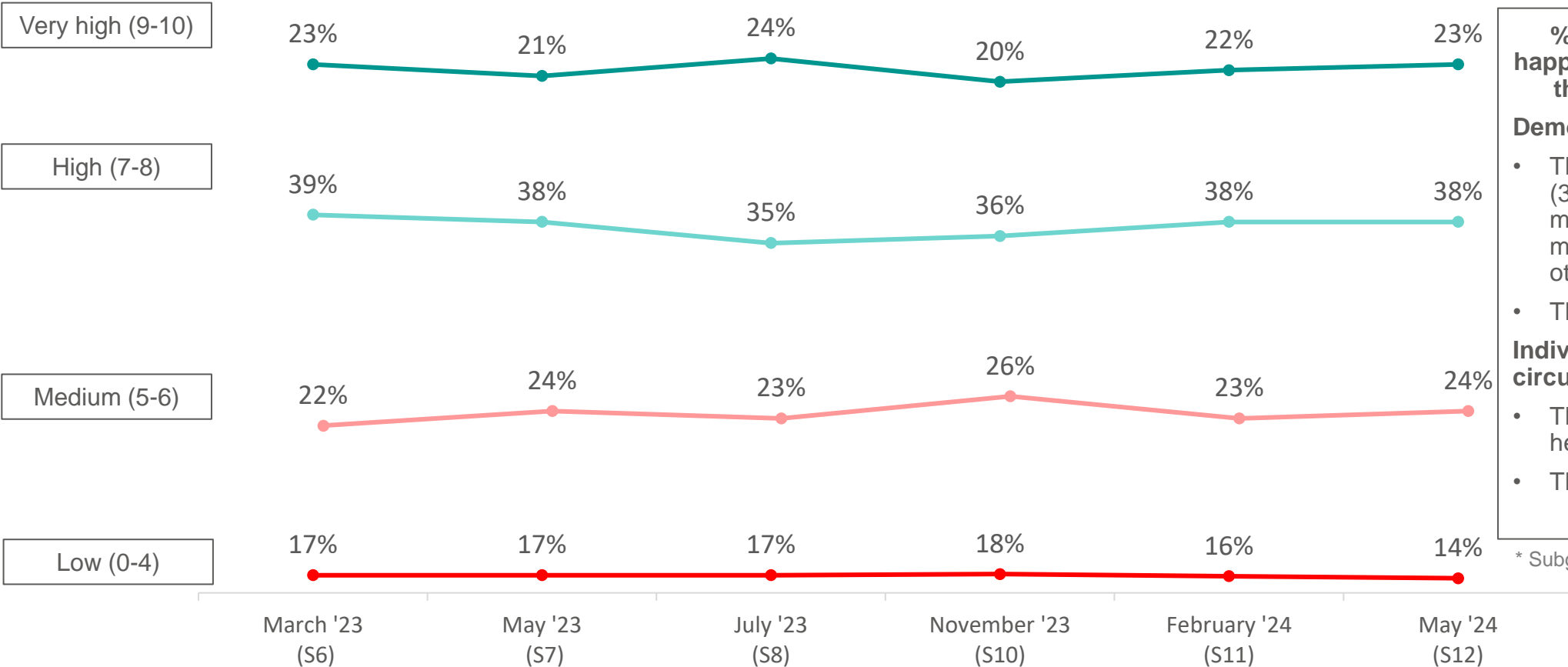
Individual and/or family circumstance:

- Those who rent their home (19%)
- Those living in single person households (17%)

* Subgroup analysis uses merged data from S10-12

3 in 5 said they feel very high or high levels of happiness – in line with February. There has been a positive downwards trend in those who have low levels of happiness since November. As with other metrics, those less likely to feel happy include those with a disability and those who rent their home

How happy did you feel yesterday?



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

Demographics:

- Those who have a disability (31%), including those with mental ill health (44%), a mobility disability (26%) or other disability (31%)
- Those aged 16-24 (20%)

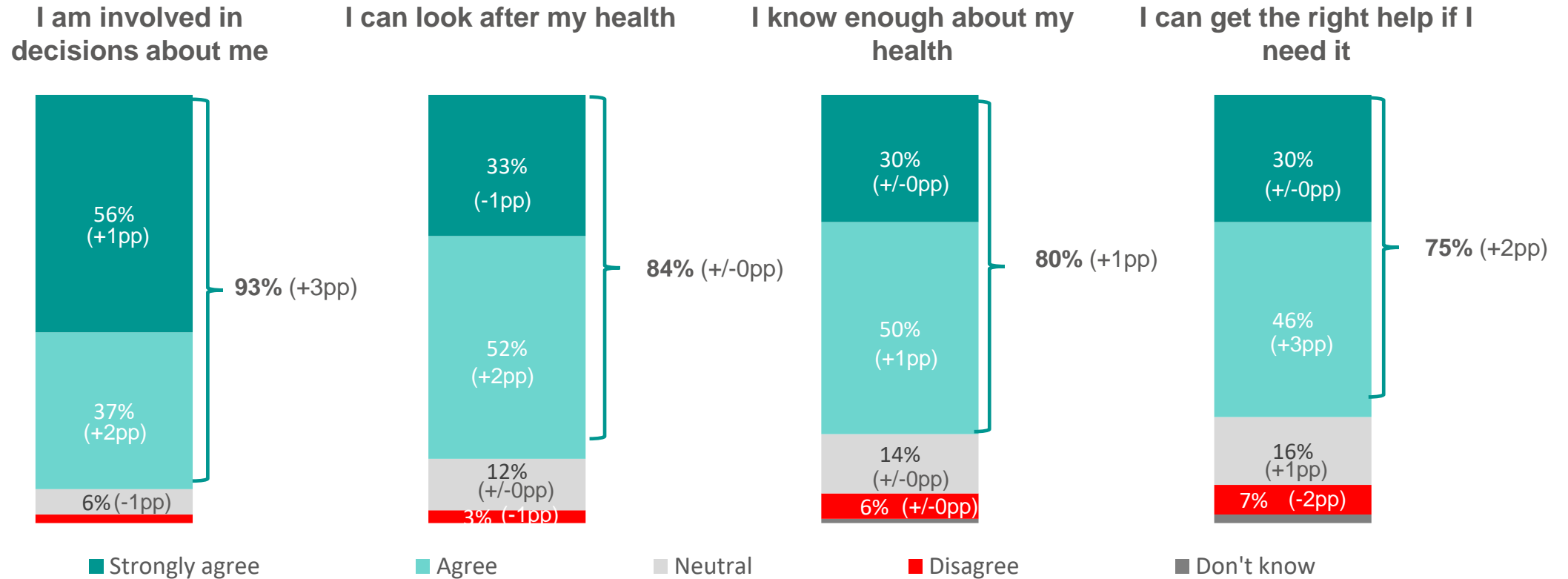
Individual and/or family circumstance:

- Those not in work due to ill health or disability (46%)
- Those who are renting (23%)

* Subgroup analysis uses merged data from S10-12

Q11. Overall, how happy did you feel yesterday, on a scale of 0 to 10, where 0 is “not at all” and 10 is “completely”? Survey 6: 1767, Survey 7: 1488, Survey 8: 1612, Survey 9: 1560, Survey 10: 1546, Survey 11: 1460, Survey 12: 1551 Thresholds are applied to responses to convert the 11-point scale into the categories shown. Unweighted base: Greater Manchester Residents Survey 11: 1460, Survey 12: 1551. Survey 10+11+12= 4551 (all respondents).

The majority of respondents continue to agree that they can manage their own health. There have been continued (albeit not statistically significant) improvements since February in those agreeing that they are involved in decisions about themselves, that they know enough about their health, and that they can get the right help if they need it



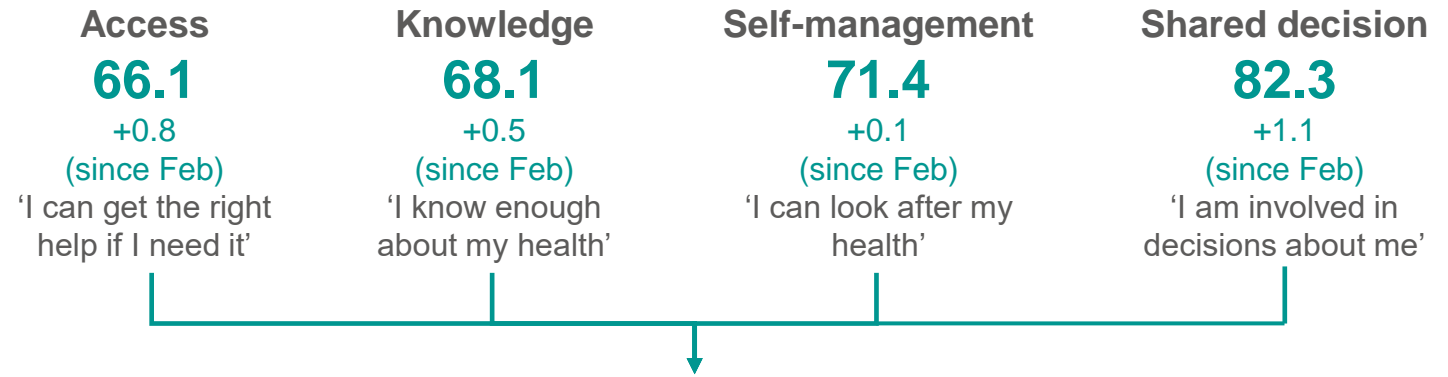
Figures in brackets show change since February (S11)

The combined effect of these improvements is that Greater Manchester's health confidence score continues to grow with GM recording the highest overall Health Confidence Score since tracking began a year ago

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

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

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



Overall Greater Manchester health confidence score (out of 100)

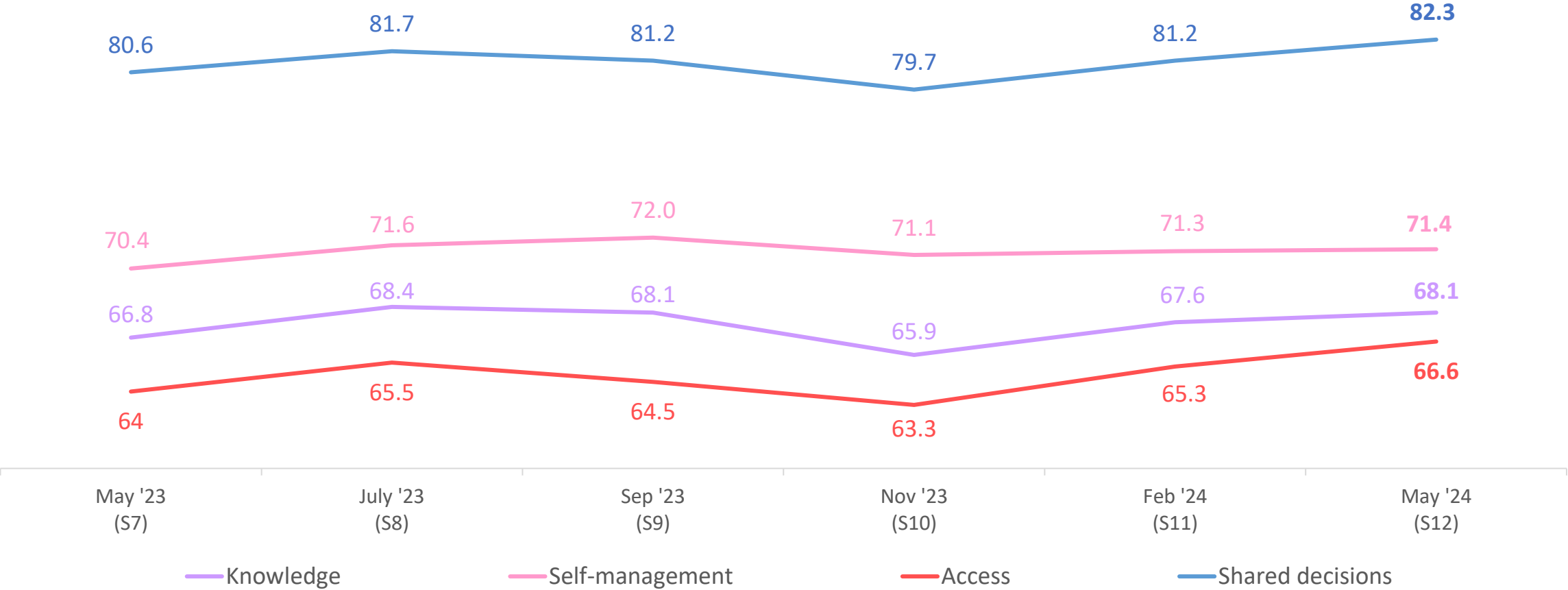
72.1

This is
+0.7

points higher than in Feb 2024 (71.4) and 1.6 points higher than in May 2023 (70.5) - see next slide for full trend over time

Since February, all dimensions of the health confidence score have risen – continuing the trend we have noted from November

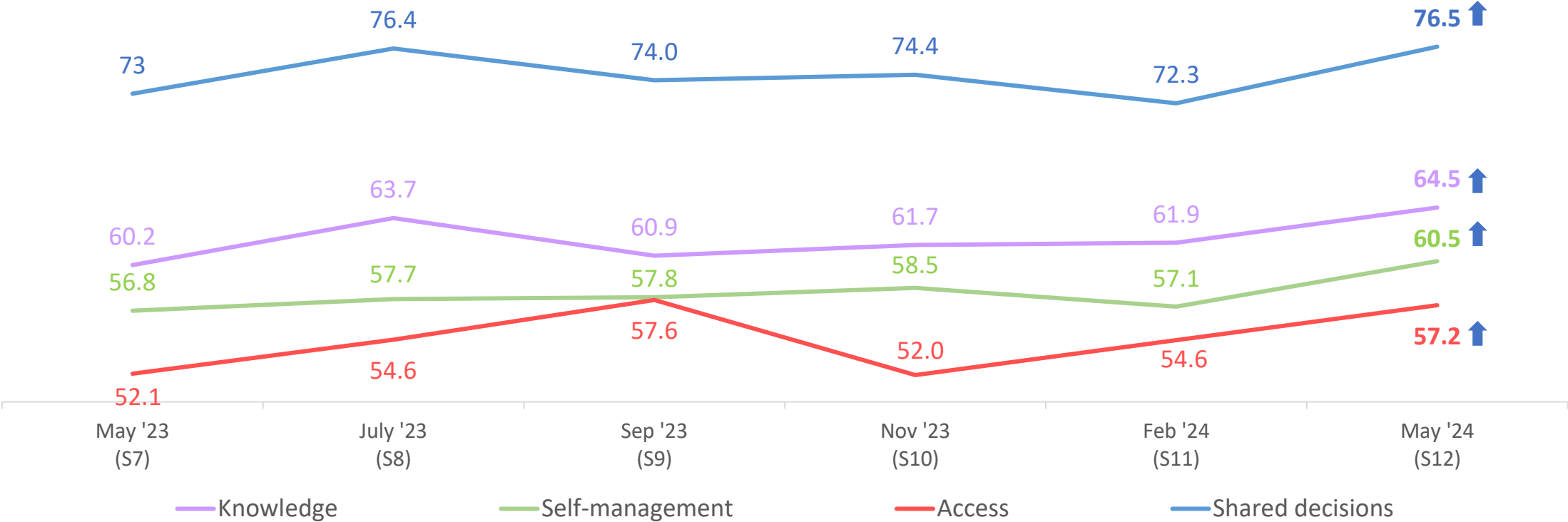
Dimensions of Greater Manchester health confidence score



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

Dimensions of health confidence among disabled respondents - all significantly higher than May 2023

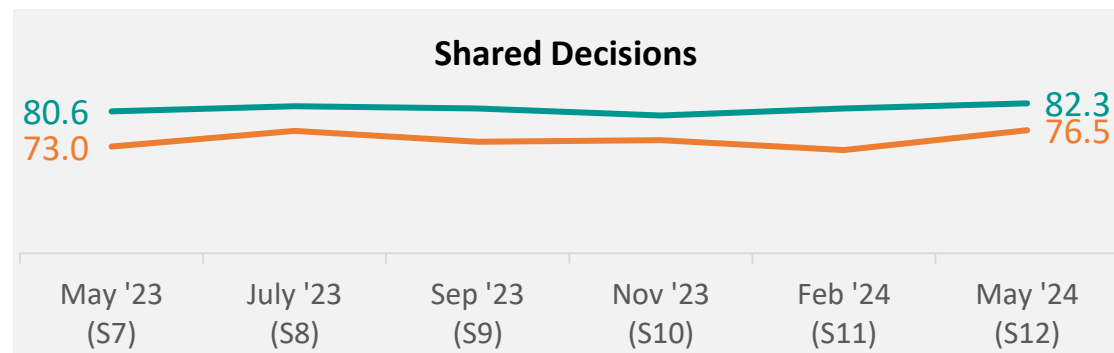
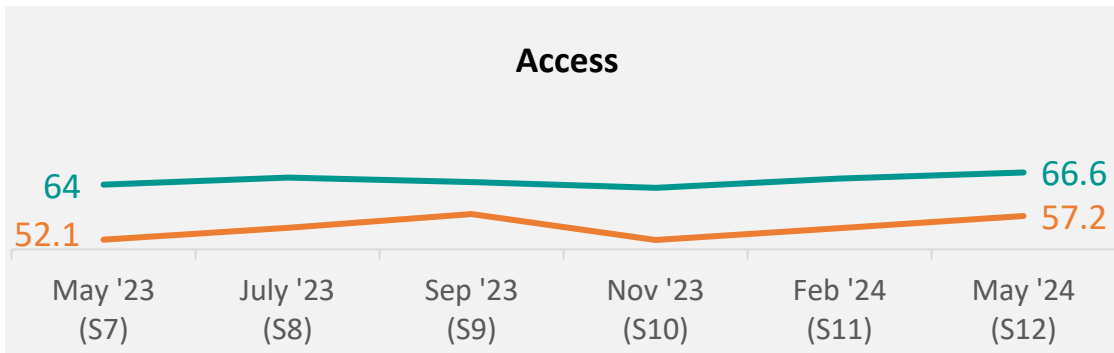
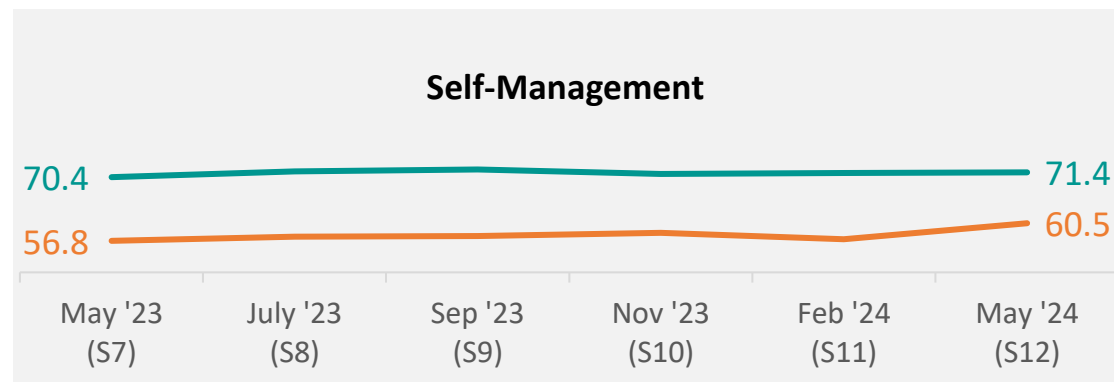
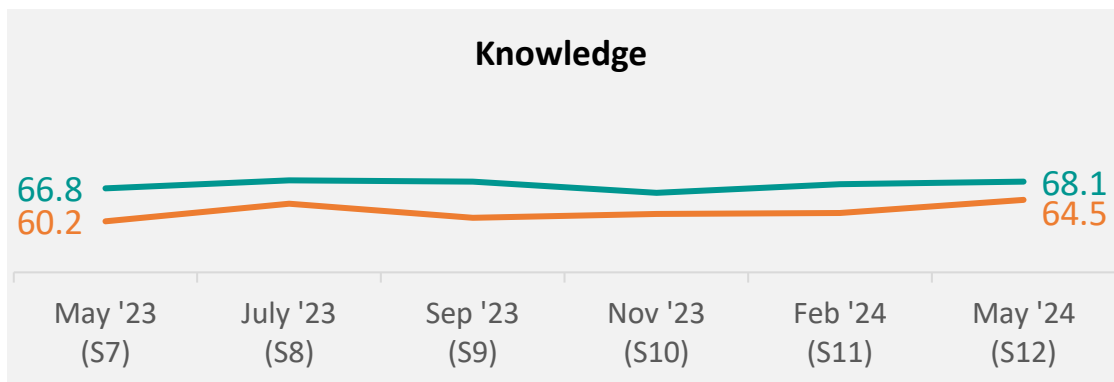
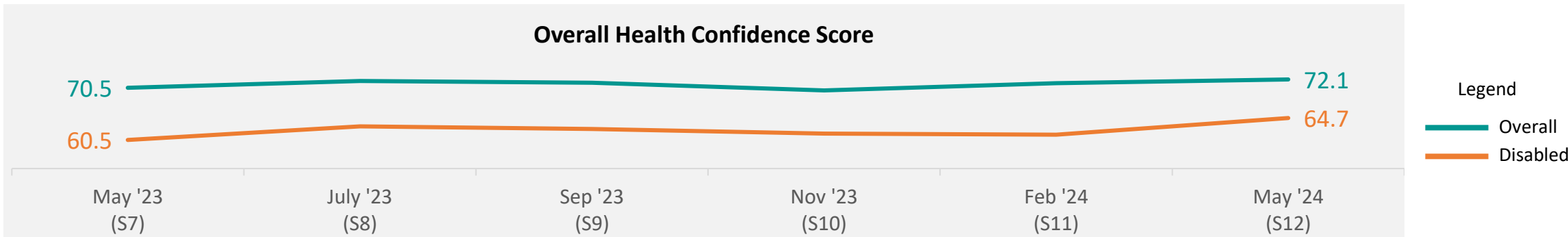
Dimensions of health confidence score among disabled respondents



↑ ↓ Significantly higher/lower than May 2023

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

The **overall health confidence** score remains lower for disabled respondents than for the general population. However, the gap in score between the total population and disabled respondents has narrowed in several regards



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

Healthy homes

Healthy homes context

[page 22](#)

Healthy homes key findings

[pages 23-24](#)

Healthy homes topline findings

[pages 25-33](#)



Healthy homes – context

This is the third survey in which 'Healthy homes' has been explored, to better understand residents' living environments and the extent to which any problems commonly associated with poor quality housing are experienced. Results in this section draw on merged base from Surveys 10 (Nov 2023), 11 (Feb 2024) and 12 (May 2024).

Questions on this topic will now be paused (with the potential to revisit at a later point in 2024/25). Results should be used to feed into broader conversations in conjunction with other datasets and engagement activity that is underway elsewhere in Greater Manchester.



Healthy homes – key findings (1 of 2)

EXPERIENCES OF PROBLEMS

- Residents continue to report they are experiencing issues in their home at a high rate, with three in five (61%) respondents noting an issue in the last year – including over 1 in 3 (35%) who are currently experiencing an issue
 - This is significantly higher among 16-24-year-olds (75%), minority ethnic groups (76%) and those with a disability (72%)
- The most common issues experienced are damp / mould (35%), broken boilers and heating (24%) and poor/missing home insulation (18%)
- Renters are more likely than homeowners to experience all issues asked about, except pest infestations. The biggest differences between renters and owners experiencing issues are damp and mould (+17%-pt difference), and fear of losing their home (+11%-pt difference)

RAISING CONCERNS / SEEKING RESOLUTION OF PROBLEMS

- Two thirds (68%) of residents experiencing issues with their housing have raised these; this is higher among renters (82%)
 - Respondents are most likely to raise concerns when they relate to broken boilers and heating (69%), gas, electricity or water supply problems (62%) and broken electrics (59%). Despite 1 in 10 (12%) people fearing losing their home, this is the issue that is least likely to be raised (43%)
 - Satisfaction with how these issues are being resolved is low, however. Across all problems, over half (56%) are dissatisfied with how their issues have or are being resolved. Satisfaction does not reach above 50% for any of the issues that have been raised
-

Healthy Homes – key findings (2 of 2)

HEALTH & WELLBEING IMPACTS

Approaching 2 in 5 (38%) of those experiencing issues say their physical or mental health or wellbeing has been largely impacted negatively as a result. This equates to a fifth (22%) of everyone included in the Residents' Survey.

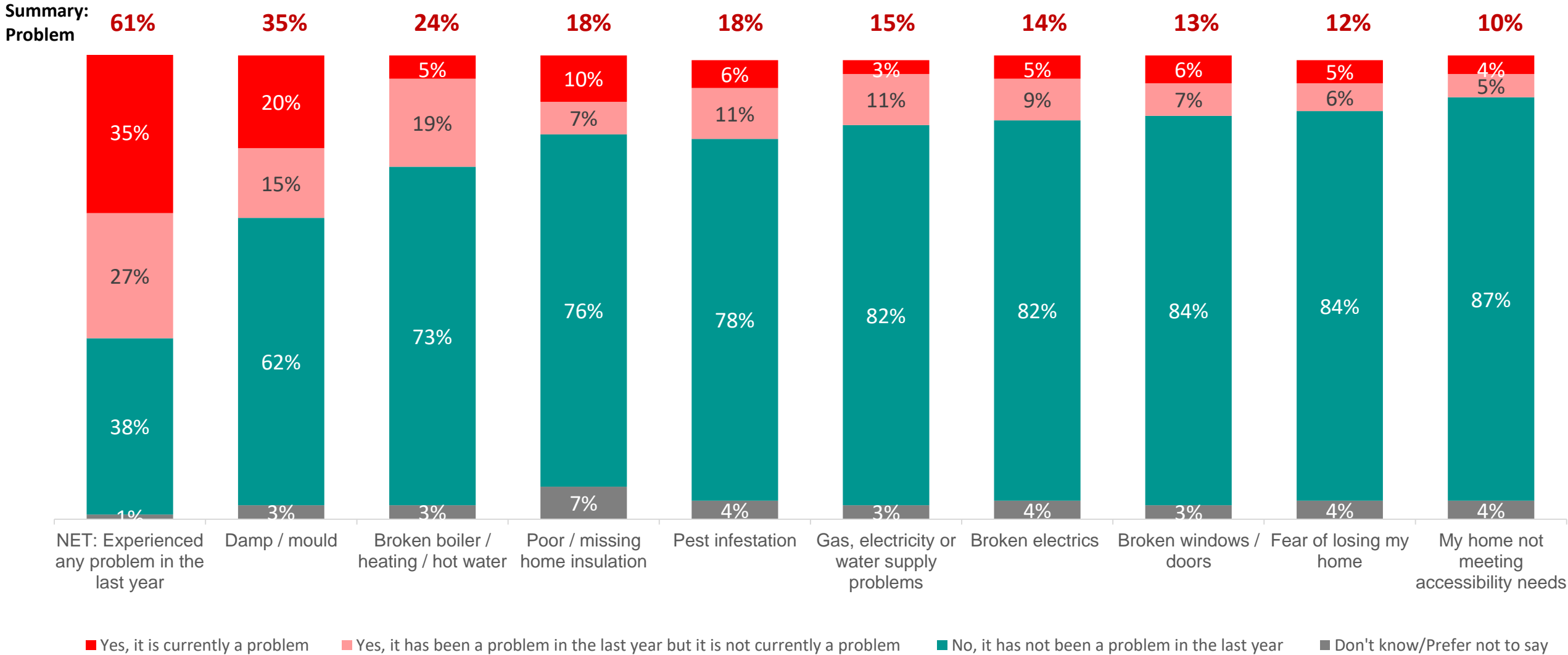
- Such health / wellbeing problems are more than twice as likely to be experienced by renters than homeowners (33% vs 16%)
- Across the whole population, damp / mould (9%) and fear of losing their home (6%) are the issues most commonly having large health impacts
- Fear of losing the home (54%), home not meeting accessibility needs (39%) and poor/missing home insulation (32%) are the issues most frequently have large negative health / wellbeing impacts on those experiencing them
- Fewer than a quarter of people experiencing these impacts have raised them with a GP (23%). The likelihood of raising things with a GP increases in some situations – e.g. those with homes not meeting accessibility needs (and those worried about losing their home)

EXPERIENCES OF RENTERS

Renters are significantly more likely to have experienced an issue with their home in the past year compared to homeowners (72% to 55%) and to be currently experiencing an issue (45% to 29%)

- Issues are particularly experienced by those renting from housing associations/trusts (77%) or from local authorities/councils (73%), rather than from private landlords (69%) – though all are more likely to have experienced an issue than homeowners (55%)
 - Problems with housing have been raised by 82% of renters who experienced them, compared to 59% of owners
 - However, there is little movement on satisfaction with how issues have or are being resolved between renters (27%) and owners (26%)
 - Despite this, renters (33%) are more likely than owners (16%) to say their physical or mental health has been largely impacted by housing problems
-

Three in five respondents are currently **experiencing a problem in their home** or have done in the last year. Damp / mould, broken boilers and poor home insulation are the most common issues



And these **issues are more prevalent among renters**, particularly those renting from local authorities and housing associations, especially damp/mould

Have experienced problems in their home in the last year (n=4,306)

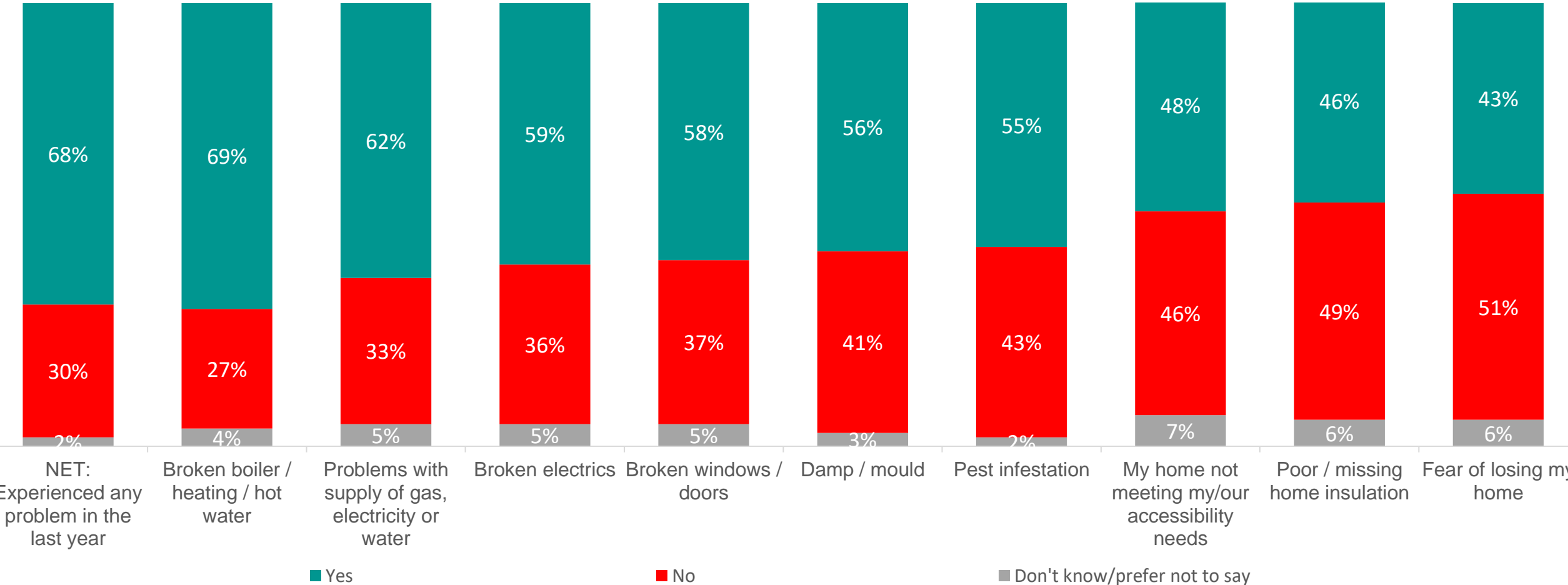
	Total (n=4306)	Owners (n=2,837)	Renters (n=1245)	Renting from Local authorities and Councils (317 of 1245)	Renting from a Housing Associations and Trusts (318 of 1245)	Privately renting (610 of 1245)
NET: Respondents who have reported a housing problem they have experienced	61%	55% ↓	72% ↑	73% ↑	77% ↑	69% ↑
Damp / mould	35%	29% ↓	46% ↑	48% ↑	47% ↑	44% ↑
Broken boiler / heating / hot water	24%	21% ↓	28% ↑	33% ↑	30%	25%
Poor / missing home insulation	18%	15% ↓	23% ↑	24% ↑	24% ↑	22% ↑
Pest infestation	18%	16% ↓	19%	20%	21%	19%
Gas, electricity or water supply problems	15%	13% ↓	18% ↑	21% ↑	18%	16%
Broken electrics	14%	12% ↓	18% ↑	12%	21% ↑	20% ↑
Broken windows / doors	13%	11% ↓	18% ↑	21% ↑	23% ↑	14%
Fear of losing my home	12%	8% ↓	19% ↑	16% ↑	17% ↑	21% ↑
My home not meeting accessibility needs	10%	8% ↓	14% ↑	19% ↑	15% ↑	11%

HEH1. Have you experienced any of the following problems in your home in the last year? Bases in parentheses. Data from S10+11+12.

↑ ↓ Significantly higher/lower than total

Across most issues, more than half of those experiencing problems **have raised concerns**. However, ‘my home not meeting accessibility needs’, ‘fear of losing my home’ and ‘poor / missing home insulation’ are more likely than not to go unmentioned

Have you ever raised concerns around this problem?



HEH1A. Have you ever raised concerns around this problem? Base: Those who have experienced any problem in the last year (418-1497)

...and this is **particularly true of renters**. Supply issues, lack of accessibility and fear of losing their home are the only issues that buck this trend – tenure does not affect likelihood to have raised concerns

All who have raised concerns around issues

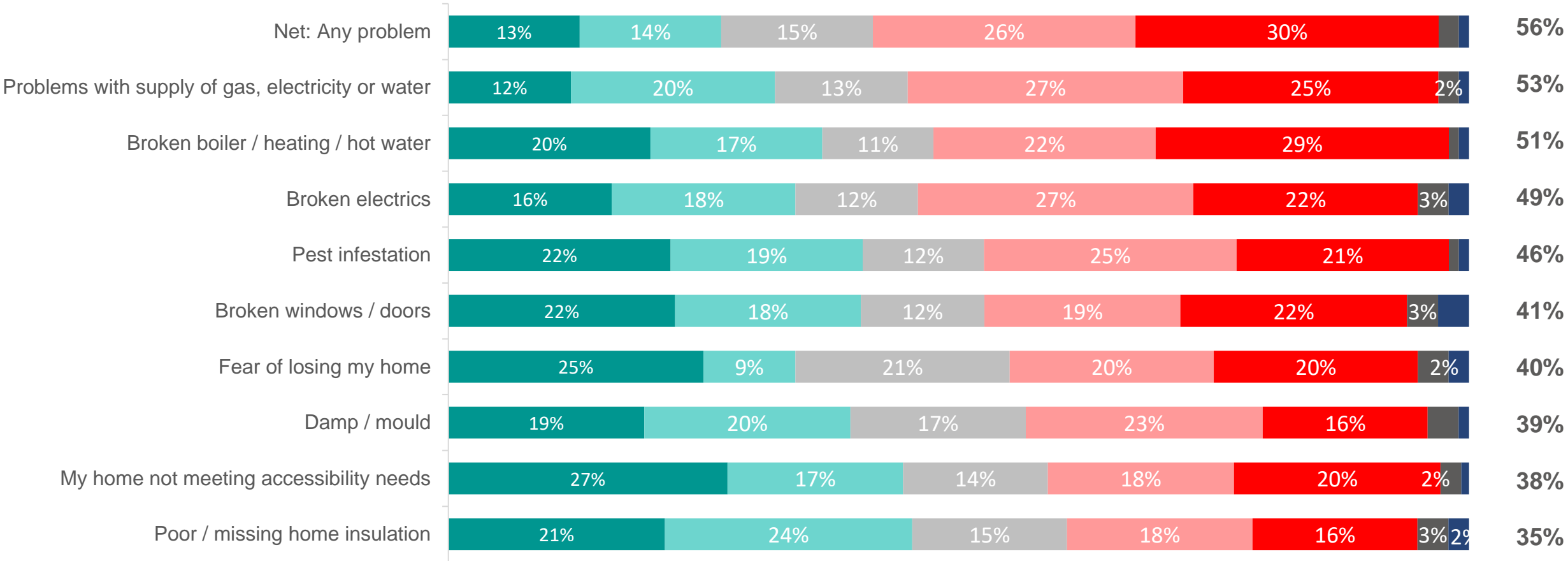
	Total	Owners	Renters
NET: Respondents who have reported a housing problem they have experienced (n=2517)	68%	59% ↓	82% ↑
Broken boiler / heating / hot water (n=974)	69%	61% ↓	83% ↑
Problems with supply of gas, electricity or water (n=573)	62%	60%	64%
Broken electrics (n=538)	59%	54% ↓	68% ↑
Broken windows / doors (n=517)	58%	45% ↓	74% ↑
Damp / mould (n=1391)	56%	43% ↓	75% ↑
Pest infestation (n=713)	55%	50% ↓	63% ↑
My home not meeting accessibility needs (n=394)	48%	43%	52%
Poor / missing home insulation (n=699)	46%	39% ↓	56% ↑
Fear of losing my home (n=447)	43%	41%	46%

↑↓ Significantly higher/lower than total

However, satisfaction with the resolution of these raised concerns is fairly low. Overall, over half of those who have raised issues about problems in their home are **dissatisfied with the outcome**

How satisfied or dissatisfied are you with how these issues have been or are being resolved?

Very / fairly dissatisfied






Very satisfied Fairly satisfied Neither satisfied nor dissatisfied Fairly dissatisfied Very dissatisfied Don't know / Prefer not to say Not applicable

HEH2. Overall, how satisfied or dissatisfied are you with how these issues have been or are being resolved? Base: Those who have raised concerns about problems in their home (201-844). Data from S10+11+12

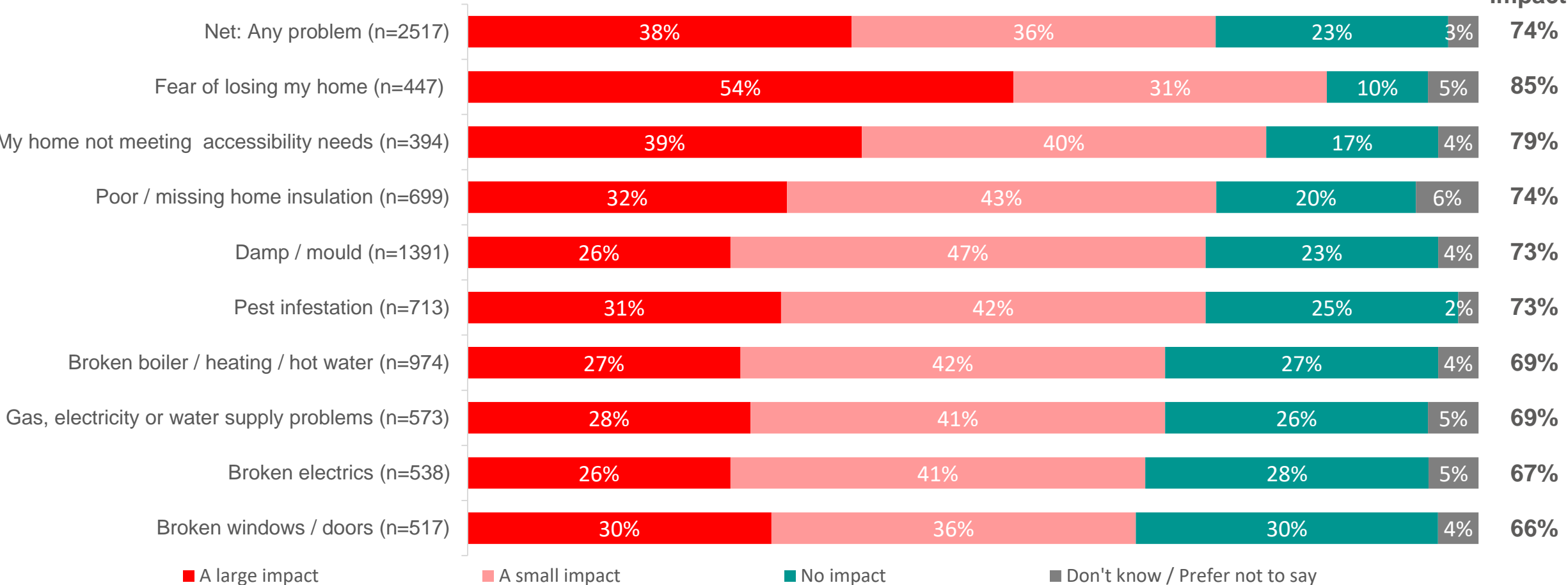
Satisfaction remains mostly stable **between owners and renters**, except for fear of losing their home. Here, owners are less satisfied than renters on resolution

Satisfaction with how issues have been or are being resolved

	Total satisfaction (Very / somewhat satisfied)	Owners	Renters
Net: Any problem (n=1,696)	27%	26%	27%
Poor / missing home insulation (n=325)	45%	40%	49%
My home not meeting accessibility needs (n=196)	44%	41%	49%
Pest infestation (n=390)	41%	40%	40%
Damp / mould (n=768)	40%	35%	44% 
Broken windows/doors (n=305)	40%	36%	44%
Broken boiler / heating / hot water (n=692)	37%	33%	40%
Broken electrics (n=322)	35%	33%	38%
Fear of losing my home (n=189)	34%	20% 	45% 
Gas, electricity or water supply problems (n=365)	31%	29%	34%

These issues and their lack of satisfactory resolution are clearly impacting on residents' **physical or mental health or wellbeing, with three in four saying any issue in their home is having an impact on them**

To what extent have these problems negatively impacted your physical or mental health or wellbeing?



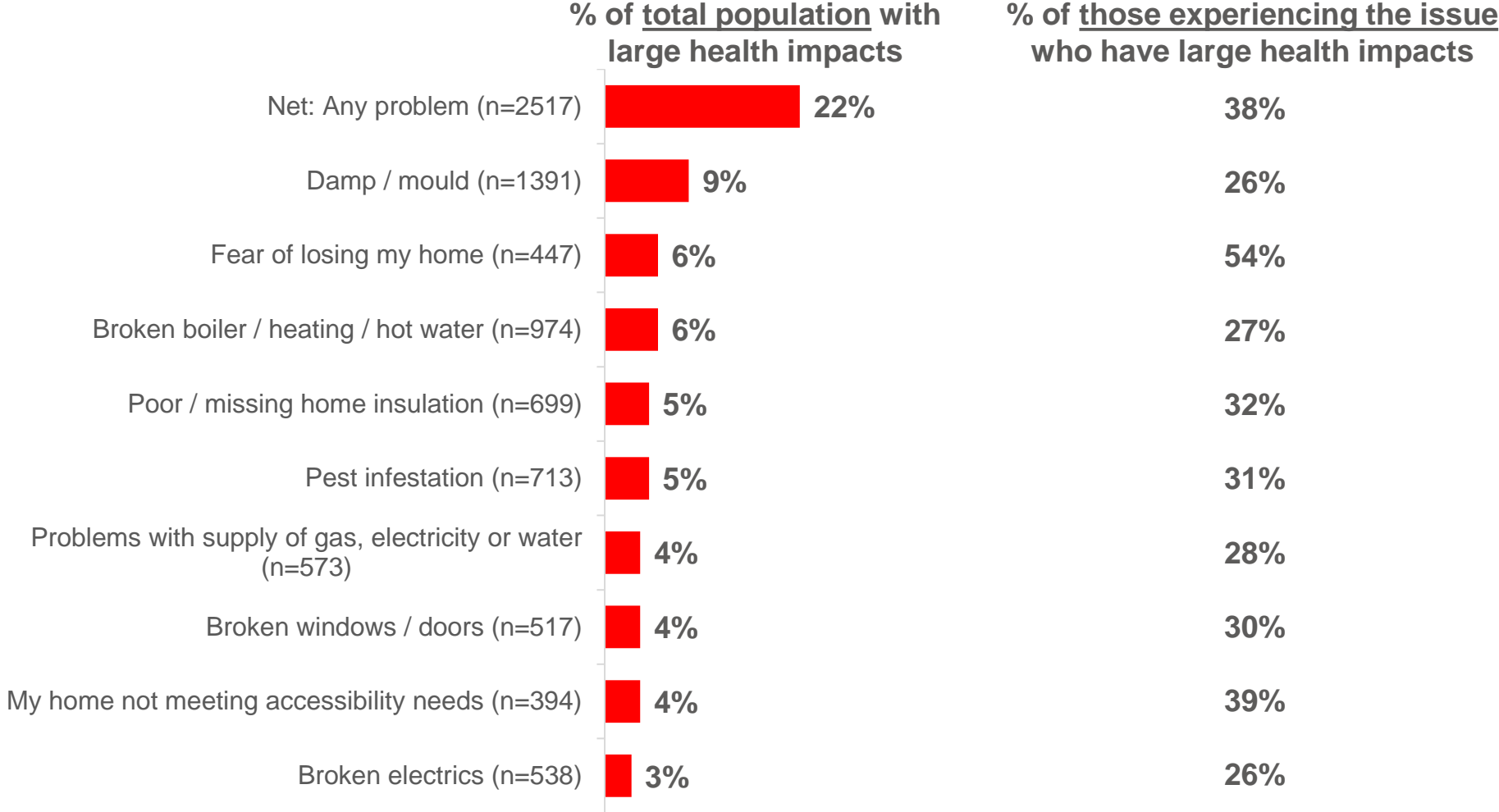
HEH3. To what extent do you believe that these problems in your home have negatively impacted your physical or mental health or wellbeing? Base: Those who have experienced an issue in their home in the last year

...and this translates to a fifth of the total population having their **health or wellbeing impacted in a large way**. This is higher still among renters, where a third of this group are largely impacted

Problems have a large negative impact on your physical or mental health or wellbeing

22%
of the total population say an issue in their home has had a large impact on their physical or mental health or wellbeing

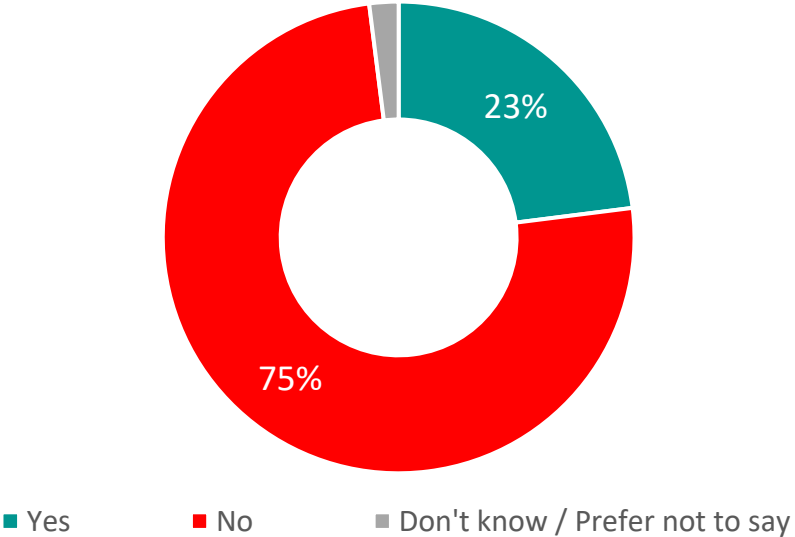
This equates to **33%** of renters and **16%** of owners



HEH3. To what extent do you believe that these problems in your home have negatively impacted your physical or mental health or wellbeing? Base: Those who have experienced an issue in their home in the last year. Data from S10+11+12

Despite this, only a quarter of those whose health is negatively impacted have raised these issues with a GP. Whilst this is higher for those whose homes are not meeting their accessibility needs, it is still only a fifth of those with any issue

Have you raised issues with a GP?



Those significantly more likely to not have raised a housing issue negatively impacting their health with a GP, compared to the GM average (75%):

- Demographics:**
- Those aged 65 and over (86%)
- Individual and/or family circumstance:**
- Those who are retired (87%)
 - Those earning over £52,000 (83%)
 - Homeowners (79%)

	Impacted negatively (small/large impact)	Proportion impacted who raised issue with a GP
Net: Any problem	74%	22%
My home not meeting accessibility needs	79%	41%
Fear of losing my home	85%	37%
Broken electrics	67%	34%
Broken windows / doors	66%	33%
Gas, electricity or water supply problems	69%	32%
Pest infestation	73%	28%
Broken boiler / heating / hot water	69%	28%
Poor / missing home insulation	74%	29%
Damp / mould	73%	24%

HEH3A. You've told us the problems in your home have negatively impacted your physical or mental health or wellbeing. Have you raised concerns with a GP? Base: Those whose health is being negatively impacted by problems in the home (1,821)

Your local area

Overview and context

[page 35](#)

Your local area key findings

[pages 36-37](#)

Your local area detailed findings

[pages 38-48](#)



Your local area – context

The survey continues to explore residents' experiences of their local area, along with their sense of community, local pride and belonging. The questions have been included to explore how happy people feel living in the city region, and to support collective activity across the system to make GM the best place for people to grow up and live a full, happy, healthy life.

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 10, 11 and 12.

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

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

Your local area – key findings (1 of 2)

OVERALL SATISFACTION WITH LOCAL AREA

- Overall satisfaction with respondents' local areas as a place to live has significantly increased since February (was 72%, now 76%), with satisfaction now being higher than the England benchmark of 74%, and returned to GM levels reported in May 2023 (also 76%)
 - Those satisfied has significantly increased since February (50%, was 46%) and those who are 'very' dissatisfied has dropped significantly (5%, 3%)
- Close to 4 in 5 (79%) of respondents would recommend their local area as a place to live. This is an increase from the figure in February 2024 and significantly higher than in November 2023

SATISFACTION MEASURES - SIGNIFICANT IMPROVEMENT

Improvements in satisfaction with specific services have been noted in several areas:

- 65% are satisfied with the availability of public transport – with a significant increase in those fairly satisfied. There have also been significant increases in those fairly satisfied with bus services (satisfaction now at 58%) and train services (satisfaction now at 46%)
 - There have been significant increases in respondents satisfaction with parks and other green spaces, with satisfaction now 76%. This increase matches the levels observed in July 2023 is so may be partly attributable to seasonal variation / weather (but still a positive)
 - There has also been a significant increase in satisfaction with local services and amenities since February (67%, was 62%) - though, again this may possible be a reflection of seasonal impacts (nb. (a similar figure of 65% was observed in May 2023)
 - There has been a significant increase in those agreeing that their local area is well maintained, which is now at 62%. While this is something which could be attributed to seasonal changes, it still represents the highest level for this metric since tracking began.
-

Your local area – key findings (2 of 2)

SATISFACTION MEASURES – NO SIGNIFICANT CHANGE

- Satisfaction with health and care services has remained in line with February (62%)
- Parents have remained just as satisfied with schools and colleges since February (76%). Parents of children in Primary School report the highest satisfaction (83%) while parents of children in college are the least satisfied (63%)
- Satisfaction with cultural facilities continues to sit just below half (46%) and has remained in line with February. The proportion of respondents satisfied with the opportunities to take part in cultural events and activities has, however, nudged upwards (increase of 3pp to 57%) - though this is not a statistically significant change
- There has been no significant change in satisfaction with the condition of roads, cycle lanes or paved pedestrian areas

NEIGHBOURHOOD AND COMMUNITY

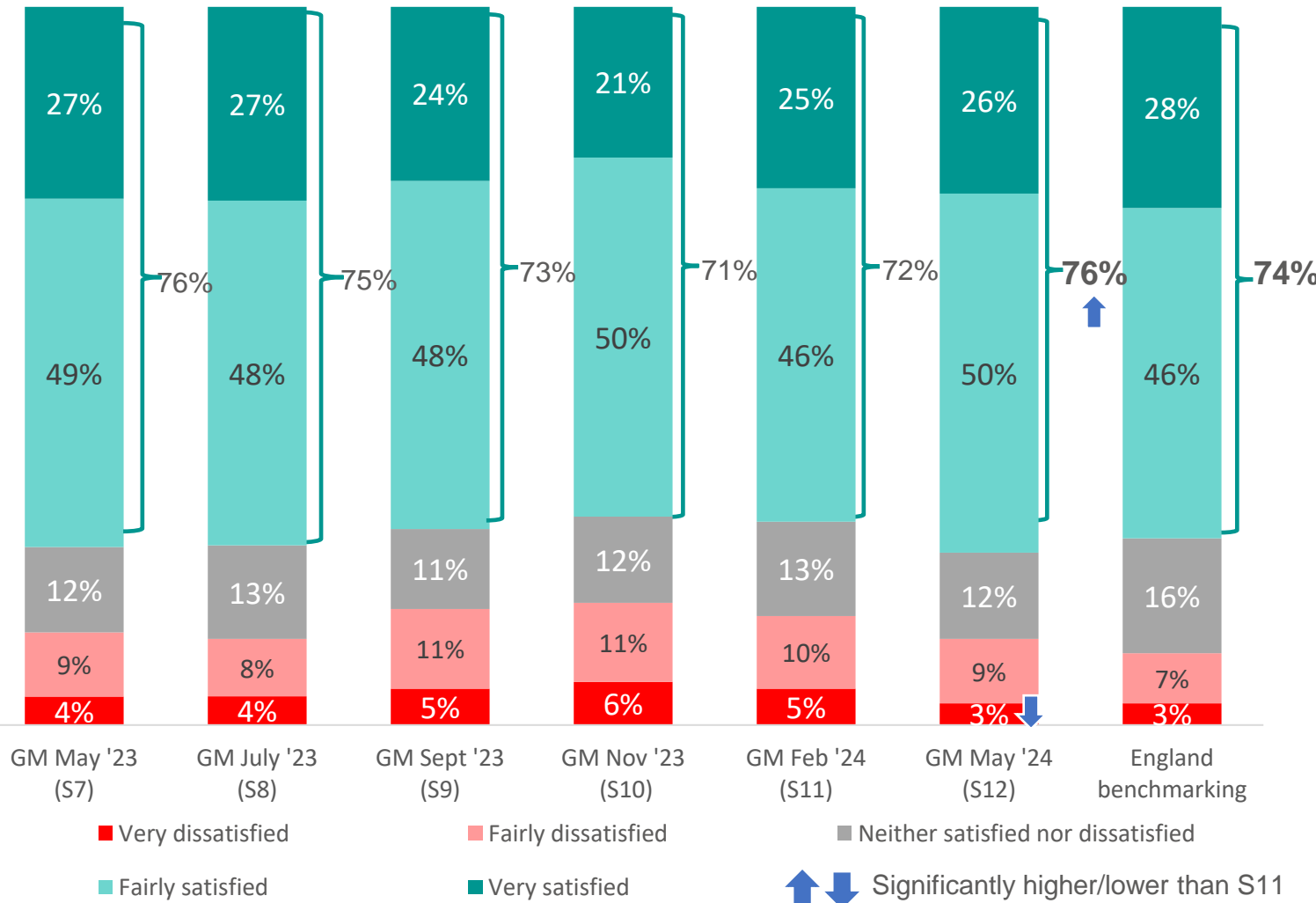
- There has been no notable change in respondents' sense of whether where people from different backgrounds get on well together, or in terms of levels of pride in their local area
 - However, there has been a significant reduction in those who 'definitely disagree' that their local area is a place where people look out for each other (12% in February, declining to 8% in May). A further positive signal from this survey round is the significant increase since February in those agreeing that if they needed help, people would be there for them (80% in February, increasing to 84% in May)

VOLUNTEERING

- A third (30%) of respondents continue to have volunteered in the last year. Volunteering is more frequent amongst a range of demographics (e.g. younger respondents aged 16-24; but also parents; and those living in households with 4+ people)
 - Less positively, there has been a significant drop in those saying that they volunteer at least once a week to 12% (from 16%)
-

Over three quarters of respondents are **satisfied with their local area** as a place to live, a significant increase since February, in line with May '23. This is now slightly higher than the England average...

Level of satisfaction with local area



% with 'low' satisfaction of local area compared to S10-12 GM average (14%)*:

Demographics:

- Those with a disability (24%) including those with mental ill health (28%), a mobility disability (21%), or other disability (27%)

- Female respondents (16%)

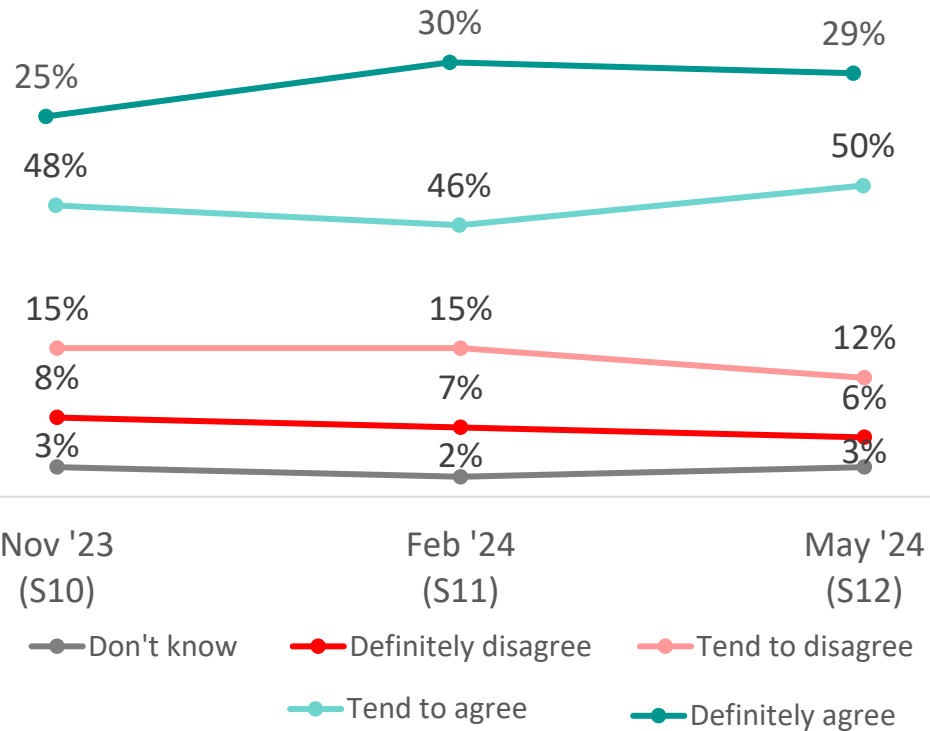
Individual and/or family circumstance:

- Those who would not recommend their local area as a place to live (59%)
- Those who disagree that people in their local area look out for each other (34%)
- Those with low levels of life satisfaction (34%)
- Those not in work due to ill health or disability (32%)
- Those with low levels of happiness (29%)
- Those aged 65+ and who are deprived (24%)
- Those who have a physical or mental health condition lasting longer than 12 months (20%)
- Those currently experiencing an issue in their home (20%)
- Those who currently have caring responsibilities (18%)
- Those renting their home (18%) specifically those renting from Local Authority / Council (20%) or a Housing Association / Trust (23%)

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

As with satisfaction, there has been a slight increase from February in those who would **recommend their local area** as a place to live (79%). Those more likely to be dissatisfied include respondents with a disability and those who feel there is a lack of social cohesion in their local area

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



% who would not recommend their area as a place to live compared to S10-12 GM average (21%)*:

Demographics:

- Respondents who are not heterosexual (27%)
- Respondents with a disability (32%) including those with mental ill health (38%), a mobility disability (28%) or other disability (34%)

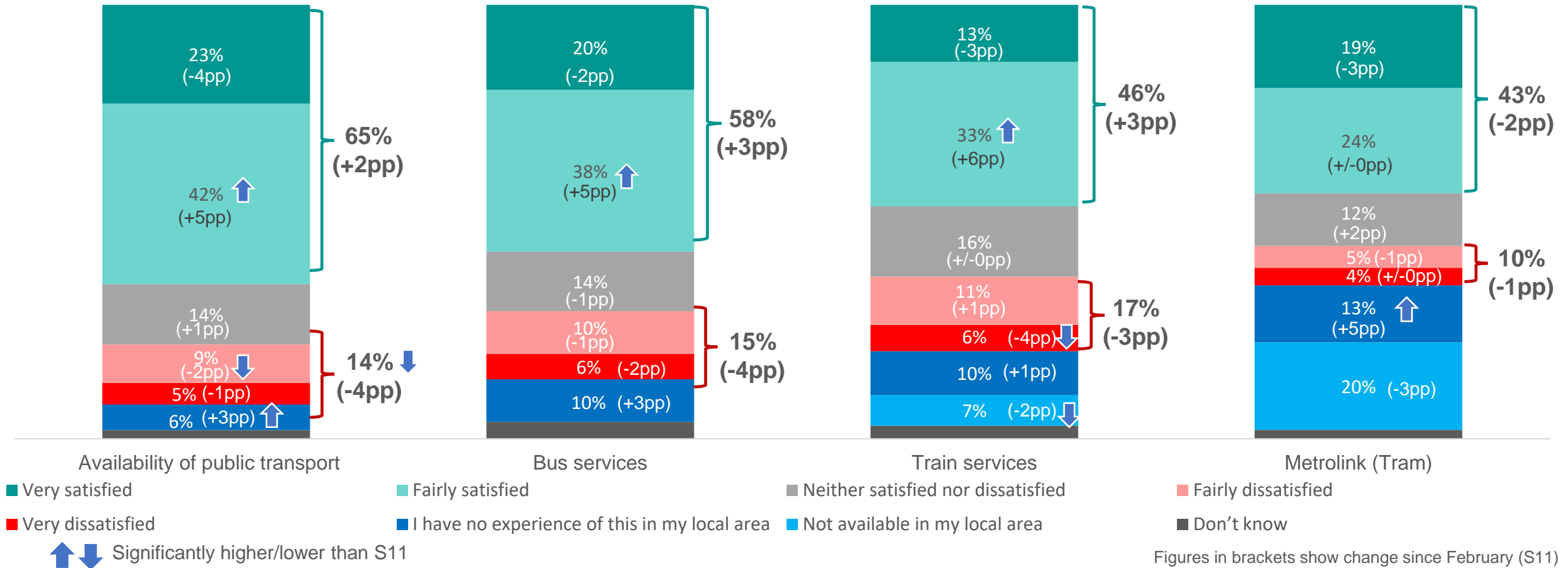
Individual and/or family circumstance:

- Those who do not agree that people from different backgrounds get on well together (53%)
- Those who do not feel the things they do in their life are worthwhile (42%)
- Those who do not agree that they are able to look after their own health (40%)
- Those not in work due to ill health or disability (36%)
- Those renting their home (28%) specifically those renting from a Local Authority / Council (29%), or a Housing Association / Trust (32%)
- Those finding it difficult to afford energy costs (28%) or their rent or mortgage (28%)
- Those earning up to £15,599 (27%)
- Those who do not have the ability to save any money in the next 12 months (27%)

*subgroup analysis using data from S10+11+12

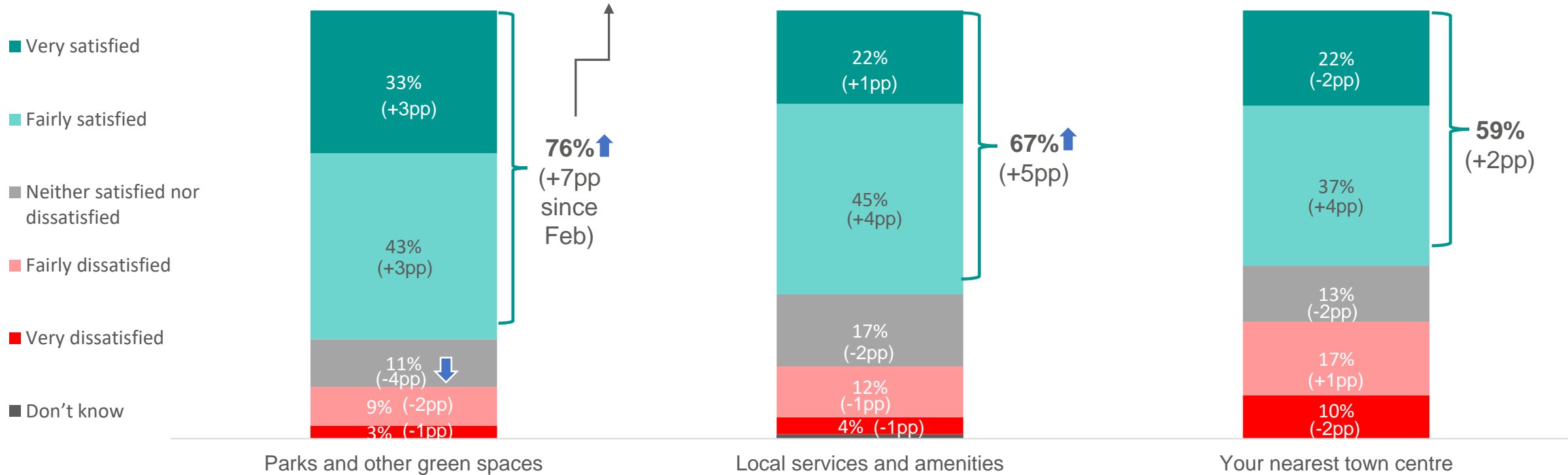
Respondents continue to be more satisfied than not with **transport and travel facilities**. Since February there have been significant increases in those who are fairly satisfied with the availability of public transport, bus services and train services.

Level of satisfaction with transport and travel facilities



Respondents are significantly more likely to be satisfied with **local parks and other green spaces** and **local services and amenities** than they were in February. Recognising that some of this will be a seasonal effect, this is positive. Conversely, however, satisfaction with town centres has not significantly changed – and over a quarter continue to be dissatisfied

This increase can be attributed to seasonality and increased usage – in July 2023, satisfaction was also 76%

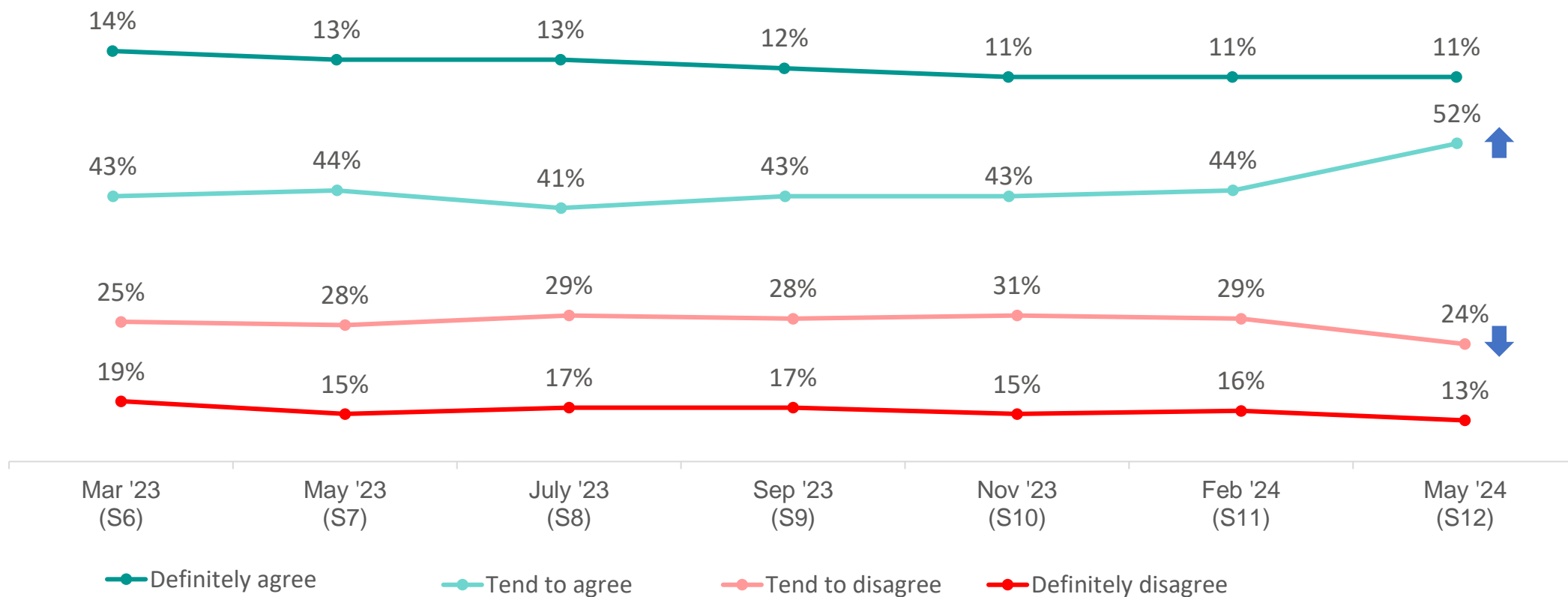


↑ ↓ Significantly higher/lower than S11

Figures in brackets show change since February (S11)

The **proportion who agree** that their local area is well maintained is at its highest level since tracking began, with 62% agreeing

To what extent do you agree or disagree 'my local area is well maintained'.....

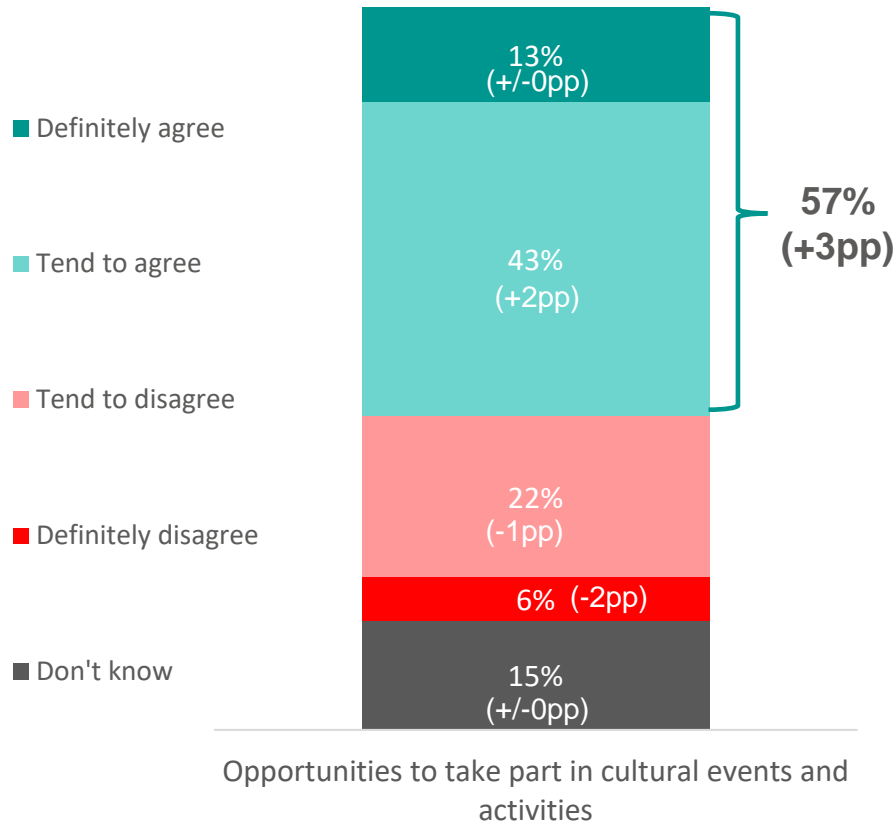


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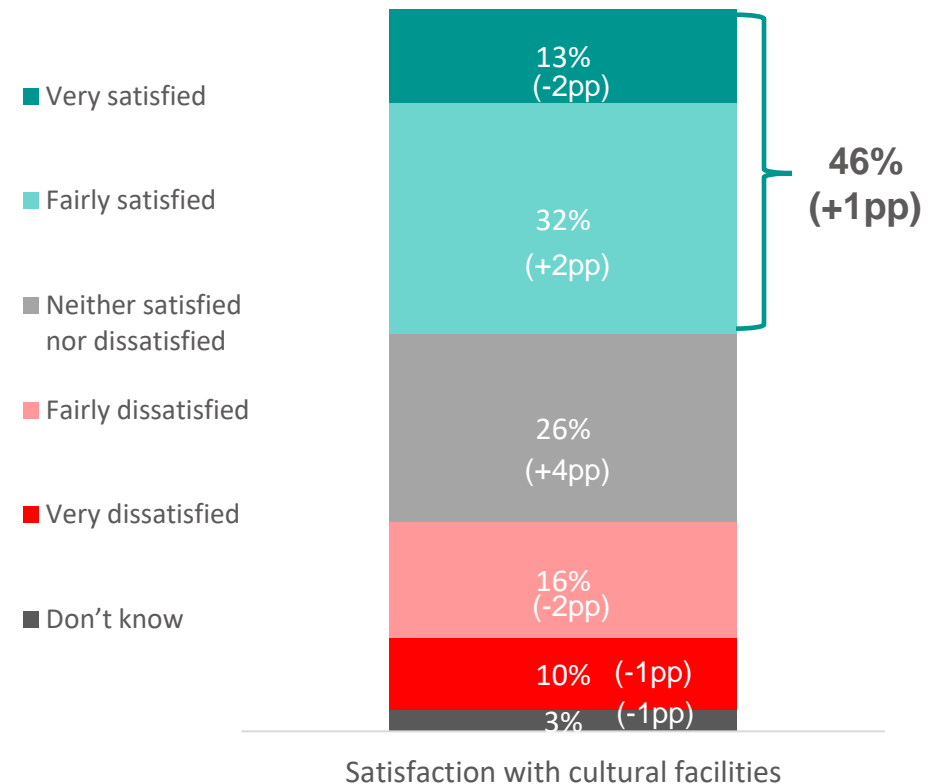
LA6. To what extent do you agree or disagree with the following statements about your local area? Unweighted base: Survey 12, 1551 (All responses) Only valid responses shown *The codes 'There are too few people in the local area' and 'People in this area are all of the same background' have been removed from this chart for visual purposes, meaning chart doesn't add up to 100%

Nearly 3 in 5 agree there are **opportunities to take part in cultural events and activities** in their local area, although less than half are satisfied with cultural facilities available, such as museums, theatres and events – neither has significantly changed since February.

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



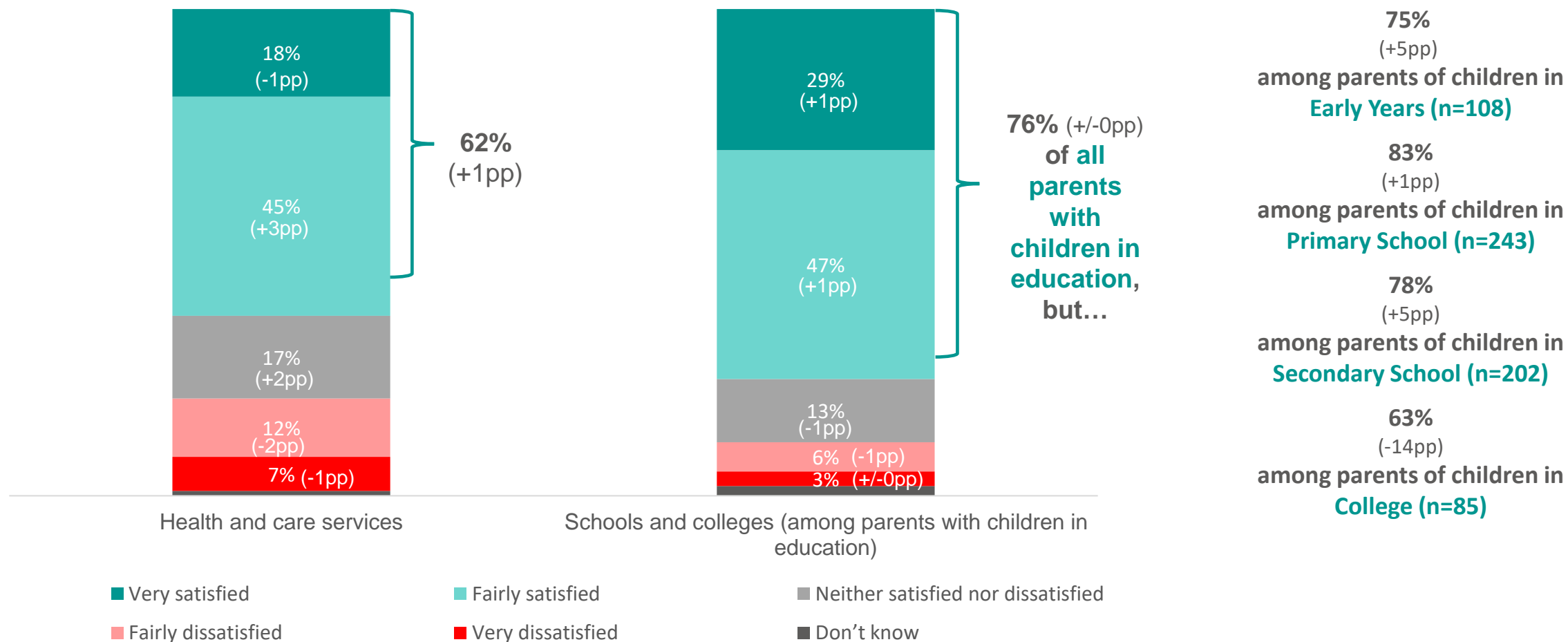
Satisfaction with cultural facilities such as museums, theatres, and events



Figures in brackets show change since February (S11)

There has been little movement in the proportion of respondents satisfied with local **health and care services**. There has been some shift in feelings about **schools and colleges among parents**, but the picture is varied depending on the age of the child

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

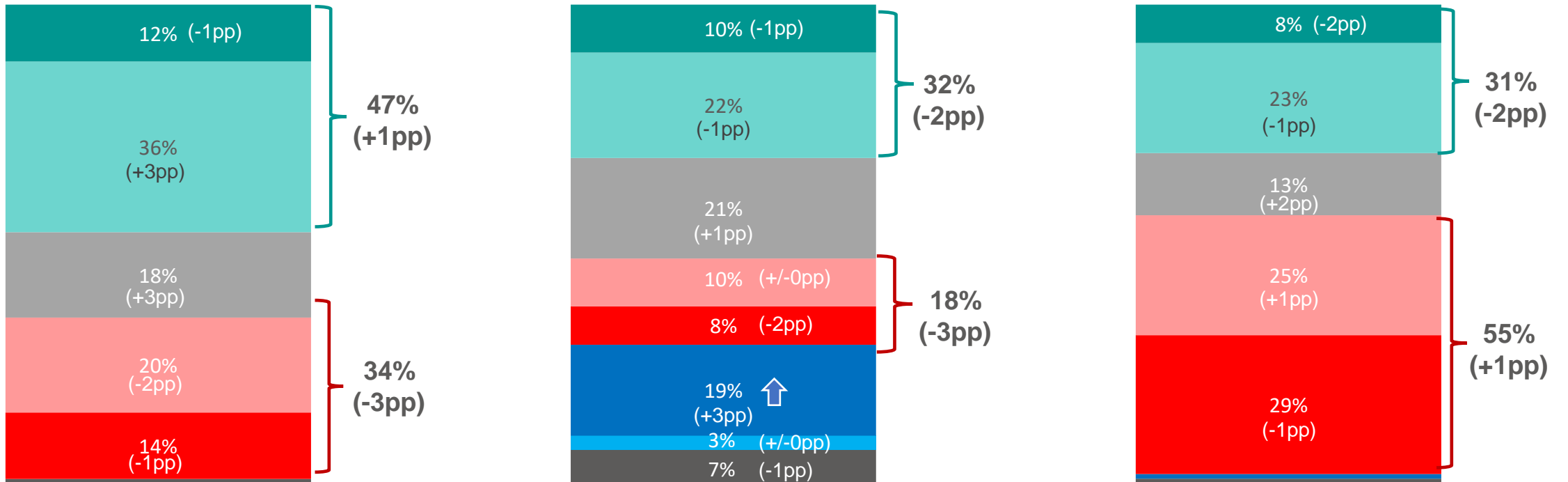


↑ ↓ Significantly higher/lower than S11

Figures in brackets show change since February (S11)

Dissatisfaction continues to be higher with **road and pavement conditions, as well as cycle routes**. Dissatisfaction with the condition of paved / pedestrian areas and cycle lanes has lessened slightly, while the majority of respondents are still dissatisfied with the conditions of roads (55%).

Level of satisfaction with transport and travel facilities



■ Very satisfied ■ Fairly satisfied ■ Neither satisfied nor dissatisfied
■ Very dissatisfied ■ I have no experience of this in my local area ■ Not available in my local area ■ Don't know

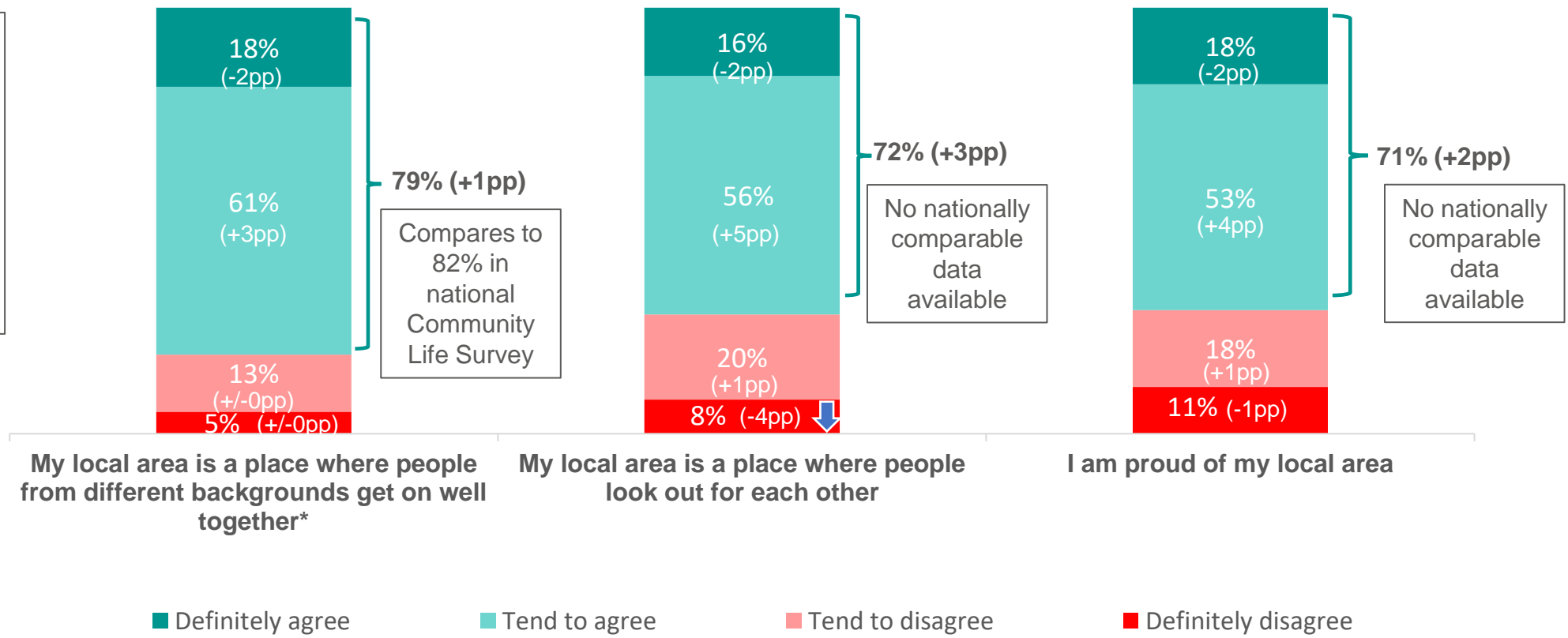
↑ ↓ Significantly higher/lower than S11

Figures in brackets show change since February (S11)

There has been some positive movement around those who agree that their local area is a place where people look out for each other, with those who definitely disagree dropping to 8%

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

*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

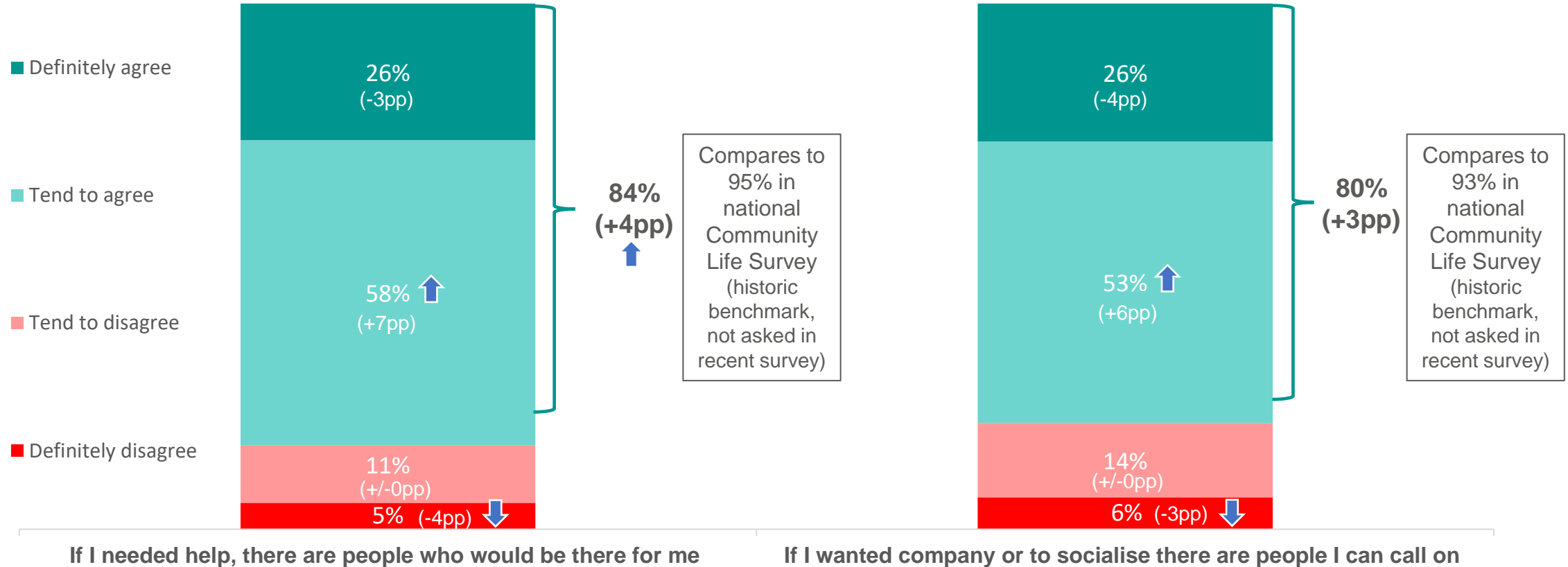


Figures in brackets show change since February (S11)

↑ ↓ Significantly higher/lower than S11

There are high levels of agreements that the area is sociable and helpful, with over 4 in 5 agreeing **other people** who would be there for them if they needed help, and that if they wanted company or to socialise there are people they can call on.

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



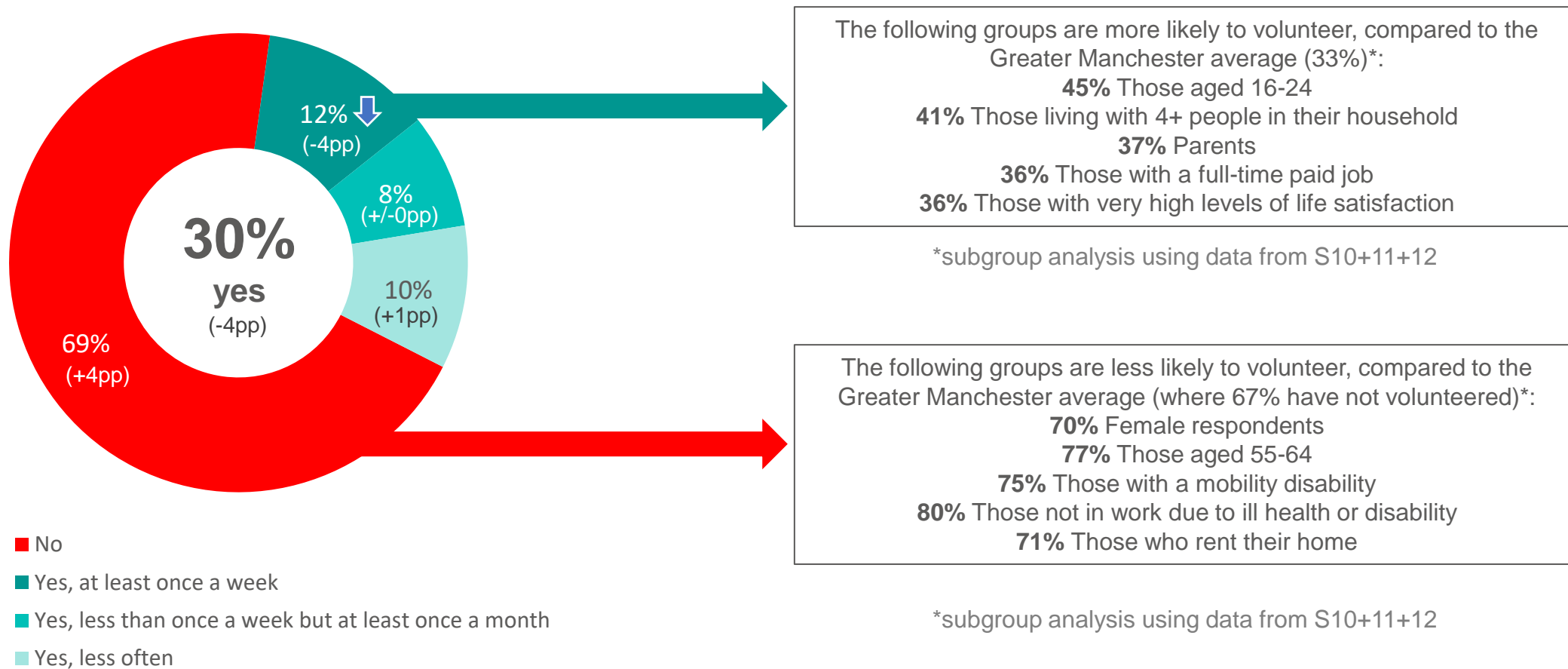
↑ ↓ Significantly higher/lower than S11

Figures in brackets show change since February (S11)

LA6. To what extent do you agree or disagree with the following statements about your local area? Unweighted base: All respondents Survey 12: 1551 (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

1 in 3 respondents have **volunteered in the past year**, but there has however been a significant decline since then in those volunteering at least once a week. Those aged 16-24, those with 4+ people in their household and parents are more likely to have volunteered.

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



↑↓ Significantly higher/lower than S11 Figures in brackets show change since February (S11)

Cost of living

Overview and context

[page 50](#)

Cost of living key findings

[pages 51-53](#)

Cost of living detailed findings

[pages 54-68](#)



Cost of living and food security – context and approach

Cost of living has been a central theme in the Greater Manchester Residents' Surveys since September 2022 (and has now been covered across ten waves). 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 10, 11 and 12.

As this evidence base has grown across multiple surveys, we are able to provide greater depth on which groups are likely to be more affected by the issues explored, highlighting those where more investigation would prove useful.

Data in the cost-of-living section of this report has been compared against the latest survey results from the ONS' Opinions and Lifestyle Survey in Great Britain, where comparable information exists. Fieldwork for this survey in Great Britain is completed fortnightly and so comparisons of the GM survey (fieldwork – May 2024) have been compared to the most closely matched ONS fieldwork period, between 8TH May – 19th May 2024. ONS uses a mixed methodology, both online and telephone interviews. Please note that some Greater Manchester questions in this section have had their wording or answers options adjusted to reflect changes to the ONS' Opinions and Lifestyle Survey, and so comparisons with Greater Manchester survey 3 and 4 findings may therefore not always be possible.

Cost of living – key findings (1 of 3)

COSTS OF LIVING – SOME POSITIVE POINTS...

- It is clear overall that, whilst residents are still feeling an impact on their daily lives from the cost-of-living, the total picture is improving somewhat on selected metrics compared to previous months. For example:
 - It is encouraging that a smaller proportion of respondents overall have reported mounting challenges with debt. 26% of respondents report borrowing more in the last month than was the case this time last year. This is 3 percentage points (ppts) lower than the February 2024 figure, and the lowest proportion since tracking began in September 2022
 - It is also a positive sign that approaching half of respondents feel they may now be able to save money over the coming 12 months. Around 2 in 5 (44%) say they will be able to save money over the next 12 months; this figure has declined by 2 percentage points since February 2024 (46%) but remains 11 percentage points higher than when the question was first asked in September 2022 (33%).
- Just over half of (55%) respondents still feel their cost of living has continued to increase in the last month. This figure is reflected across Great Britain*, where 55% also report an increase to their cost of living
 - While many residents are still taking various actions in response to cost-of-living increases, many of the individual actions taken have become much less common since February. These include, for example, those taking fewer non-essential journeys in their own vehicles (was 36%, now 25%) and those spending less on non-essentials (was 60% in February, now 53%)

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

Cost of living – key findings (2 of 3)

COSTS OF LIVING – SIGNIFICANT CHALLENGES REMAIN ...

- **FINANCIAL RESILIENCE** - Despite this improving picture in some aspects of the survey, GM respondents continue to show less financial resilience than respondents to similar national surveys, as has been the case across the past 8 surveys, since September 2022:
 - Around half (51%) of GM respondents say that they would be able to afford an unexpected but necessary expense of £850, compared to over 3 in 5 (65%) for GB
- **ENERGY COSTS** - 2 in 5 (43%) of respondents say they have difficulty affording energy costs. This continues to be significantly higher than the GB average (31%), with most of this difference driven by the proportion who say they find these costs very difficult (10% in GM vs 7% GB average)
 - On a positive note, the warmer weather naturally translates into fewer GM residents citing difficulty with their energy costs compared to February (43% cf. 47% in February)

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

Cost of living – key findings (3 of 3)

ONGOING TRACKING (HOUSING)

- Over a quarter (28%) of renters and mortgage holders report that they have seen their payments increase over the last month.
- Since February 2024, proportions of mortgage holders (33%) and renters (46%) finding it difficult to afford these payments have remained broadly in line. Comparing back to March 2023, those mortgage holders having difficulties is unchanged (at 35%), while among renters has fallen (was 53%)
- The proportion of renters who say they are behind has decreased since the last survey (12%, was 13% in February). This most recent fluctuation is driven by tenants of Housing Association (13%, was 16%) and Local Authorities social housing (18%, was 20%)

ONGOING TRACKING (FOOD)

- There has been a positive continuing trend in respondents saying they have not, at any point in the last 12 months, experienced any food security issues (though see November's survey results which confirm acute challenges are continuing for a significant minority):
 - 69% have never found that the food they bought didn't last and didn't have the money to buy more
 - 66% have never worried whether their food is going to run out before being able to buy more
 - 64% say that they have never been unable to afford to eat balanced meals

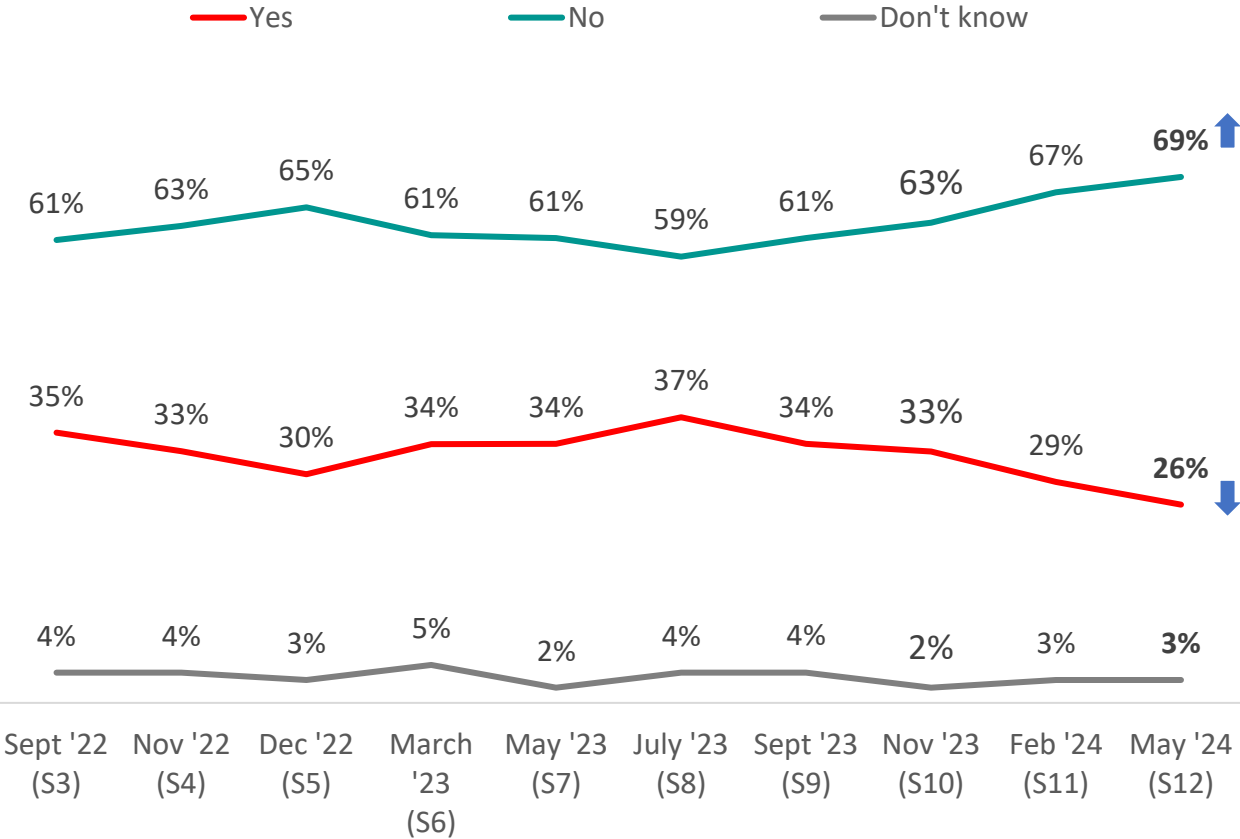
NEW INSIGHTS* (NHS SERVICES)

- 10% of GM residents say that in the past month, they have experienced an occasion when they were unable to access an NHS health and / or social care service due to cost implications. This rises among renters, young people and those with a disability

*This was the first time the cost-of-living impact on accessing NHS services has been explored - results should be taken as a "first look", and the next survey wave will explore in more detail

The proportion of respondents who **borrowed more money or used more credit in the past month** compared to the same time last year has fallen to one quarter, indicating a positive outlook. This is significantly lower than February and the lowest result since the question was introduced in Sep 2022

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



Between November and May (surveys 10-12), those who have borrowed more money or used more credit than usual in the last month, compared to the GM average (29%), are higher among:

Demographics:

- Those with a disability (38%); including those with mental ill health (51%), learning disabilities (43%), other disabilities (37%)
- Those aged 25-44 (39%), and 16-24 (38%)
- Those who are not heterosexual (37%)
- Those from within racially minoritised communities (36%), including Black respondents (40%)
- Those with caring responsibilities (35%)

Individual and/or family circumstance:

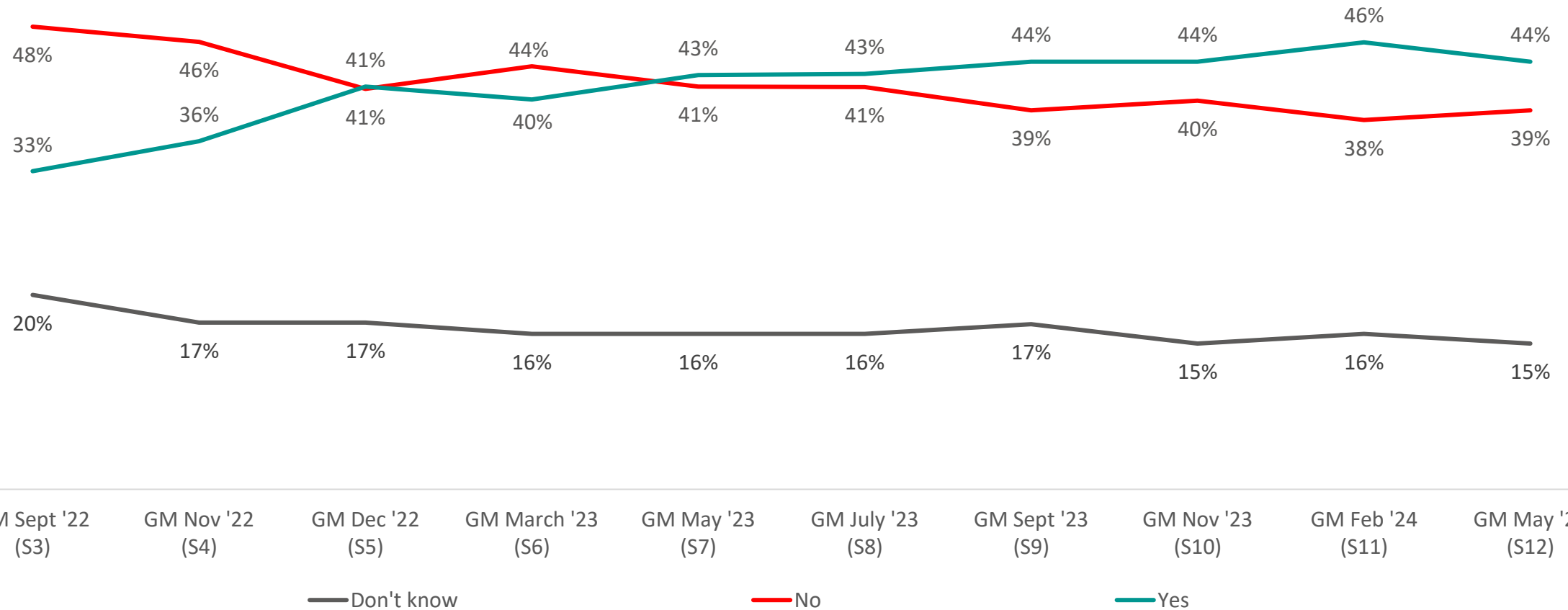
- Those who are financially vulnerable (72%)
- Those who are renting (40%)
- Parents (38%), including children aged under 5 (45%), and 5-15yos (40%)
- Those working in the public sector (37%)
- Those in full time employment (34%), out of work for 6 months or less (46%), homemakers (39%), those not in work due to ill health or disability (51%)
- Those earning above the Real Living Wage (34%)

*subgroup analysis uses S10-12 data

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

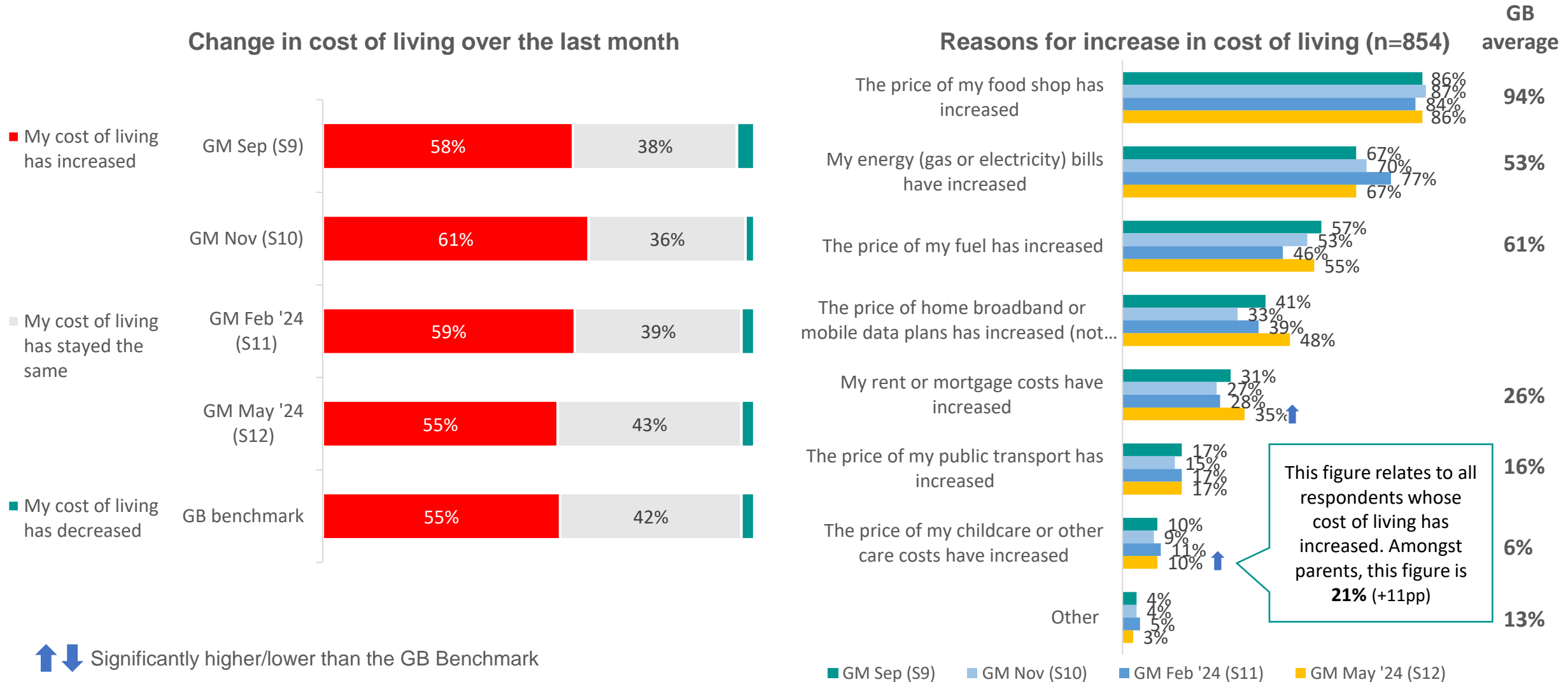
Over two fifths of respondents think they will be **able to save money** over the next 12 months, in line with November. This proportion has remained relatively consistent since May 2023, and positively hasn't fallen below 2 in 5 respondents since Nov 2022

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; Survey 10, 1546; Survey 11, 1460; Survey 12, 1551 (All respondents).

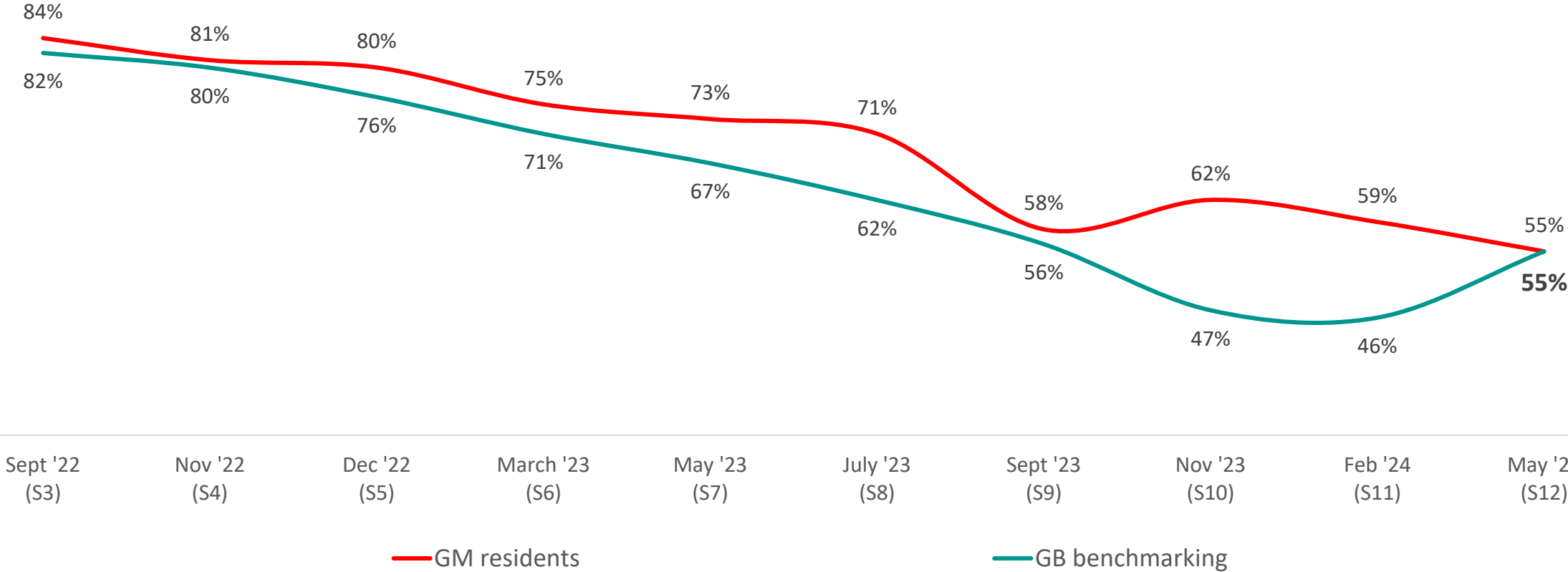
3 in 5 respondents say their cost of living has increased in the last month – 4 percentage points (pp) lower than in February 2023 and in line with the GB average. GM respondents are more likely than those in ONS surveys to report recent increases in rent / mortgage costs and childcare costs



CL5. Has your cost of living changed compared to one month ago? CL6. Over the last month, in which ways has your cost of living increased? Base: S9, 1560, S10, 1546, S11, 1460, S12, 1551 (All respondents); S9, 945; S10, 964; S11, 860; S12, 854 (All whose cost of living has increased). ONS data, based on national fieldwork 8th – 19th May 2024

The **proportion of respondents saying their cost of living has increased** has fallen since February 2024, in line with the Great Britain average. It is now at its lowest point since first introduced in Sep 2022

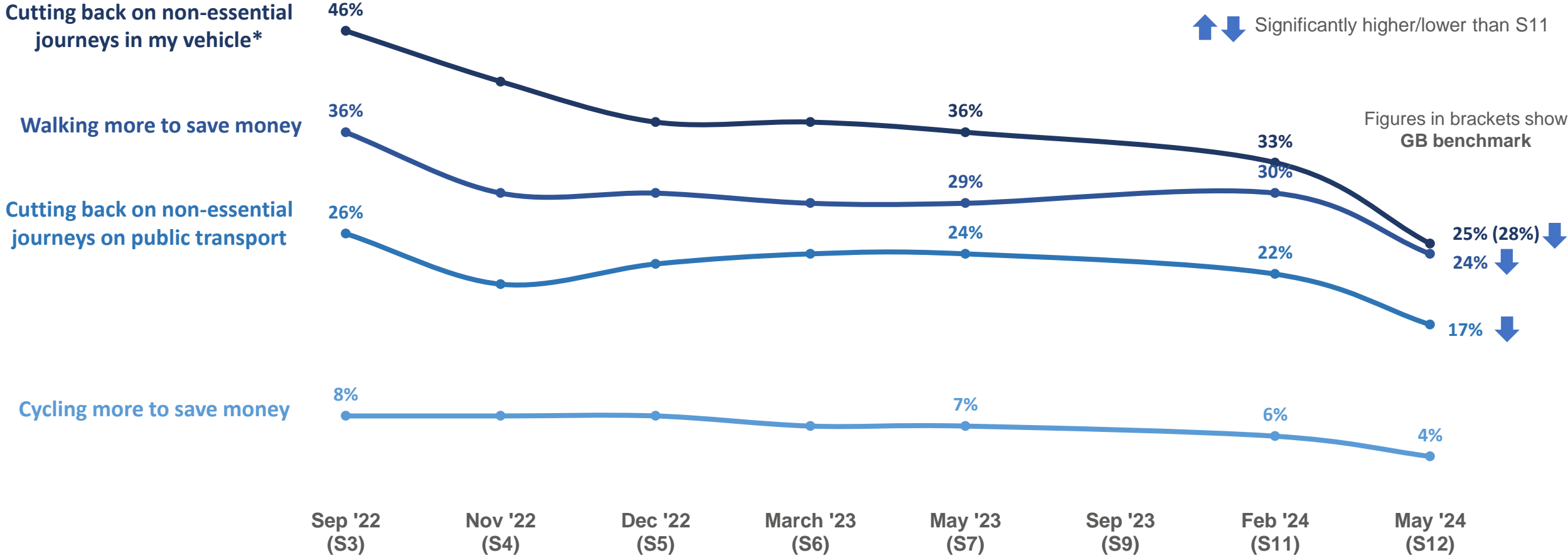
Proportion reporting an increase in their cost of living over the past month



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

Just over 8 in 10 respondents are **taking action to save money** as a result of cost-of-living increases. This has remained stable across waves. Despite over half saying their cost of living has increased, there have been significant drops across some actions which are being undertaken since February

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



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

CL7. Which of these, if any, are you doing because of the increases in the cost of living? 1,551 (All respondents).

*Not asked in S9

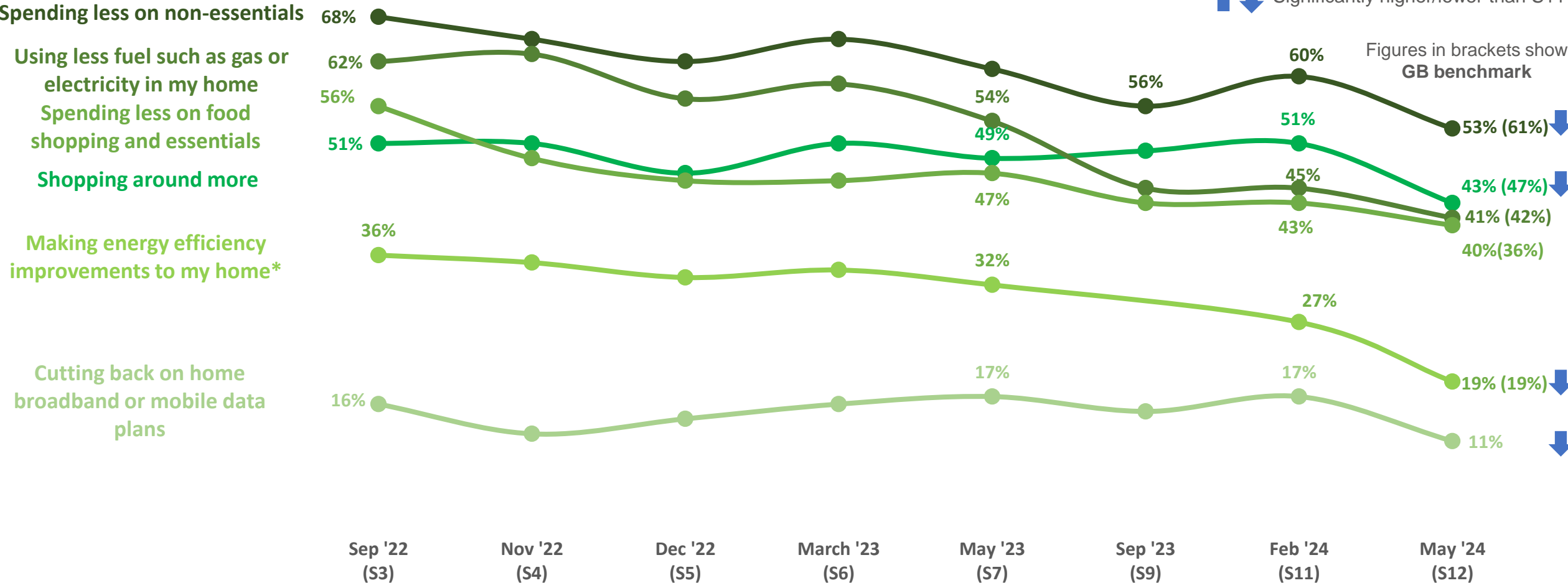
GB benchmarking is not available for all statements. Statements which can be compared are shown in brackets where available.

5 in 10 Greater Manchester respondents are spending less on non-essentials due to the increase in the cost of living – lower than the GB average

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

↑ ↓ Significantly higher/lower than S11

Figures in brackets show GB benchmark



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

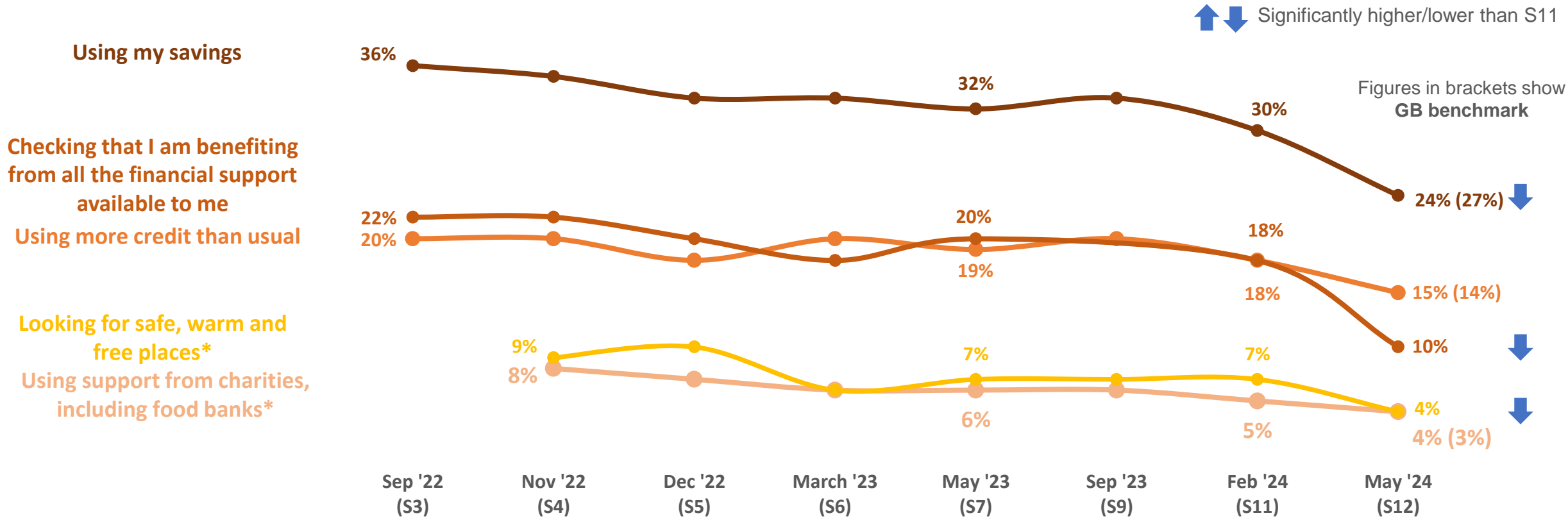
CL7. Which of these, if any, are you doing because of the increases in the cost of living? 1,551 (All respondents).

*Not asked in S9

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

1 in 4 Greater Manchester respondents are using their **savings** due to the increases in the cost of living. This is the first time since tracking that the GM average has been below the GB average

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



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

CL7. Which of these, if any, are you doing because of the increases in the cost of living? 1,551 (All respondents).

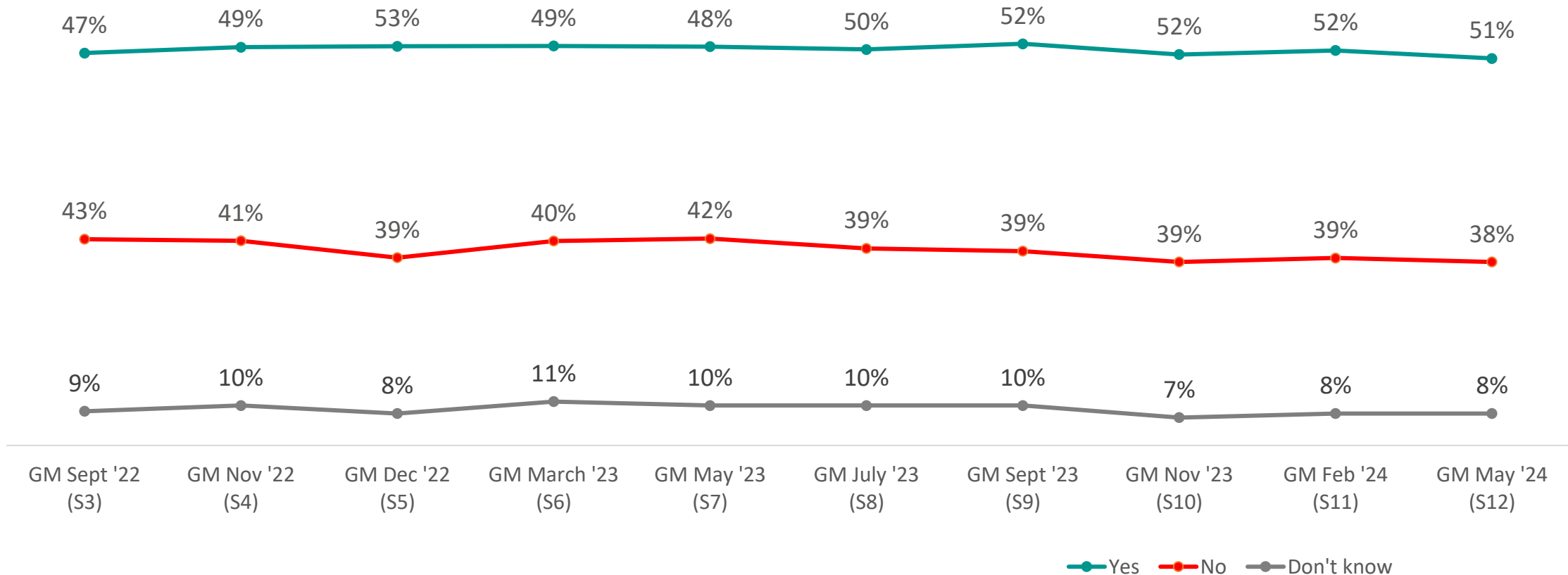
*Not asked in S3

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

**Not asked in S3

However, Greater Manchester respondents continue to be considerably less likely than the GB average to be able to **afford an unexpected expense of £850**. This ability has remained largely stable since July 2023, at around half of local respondents

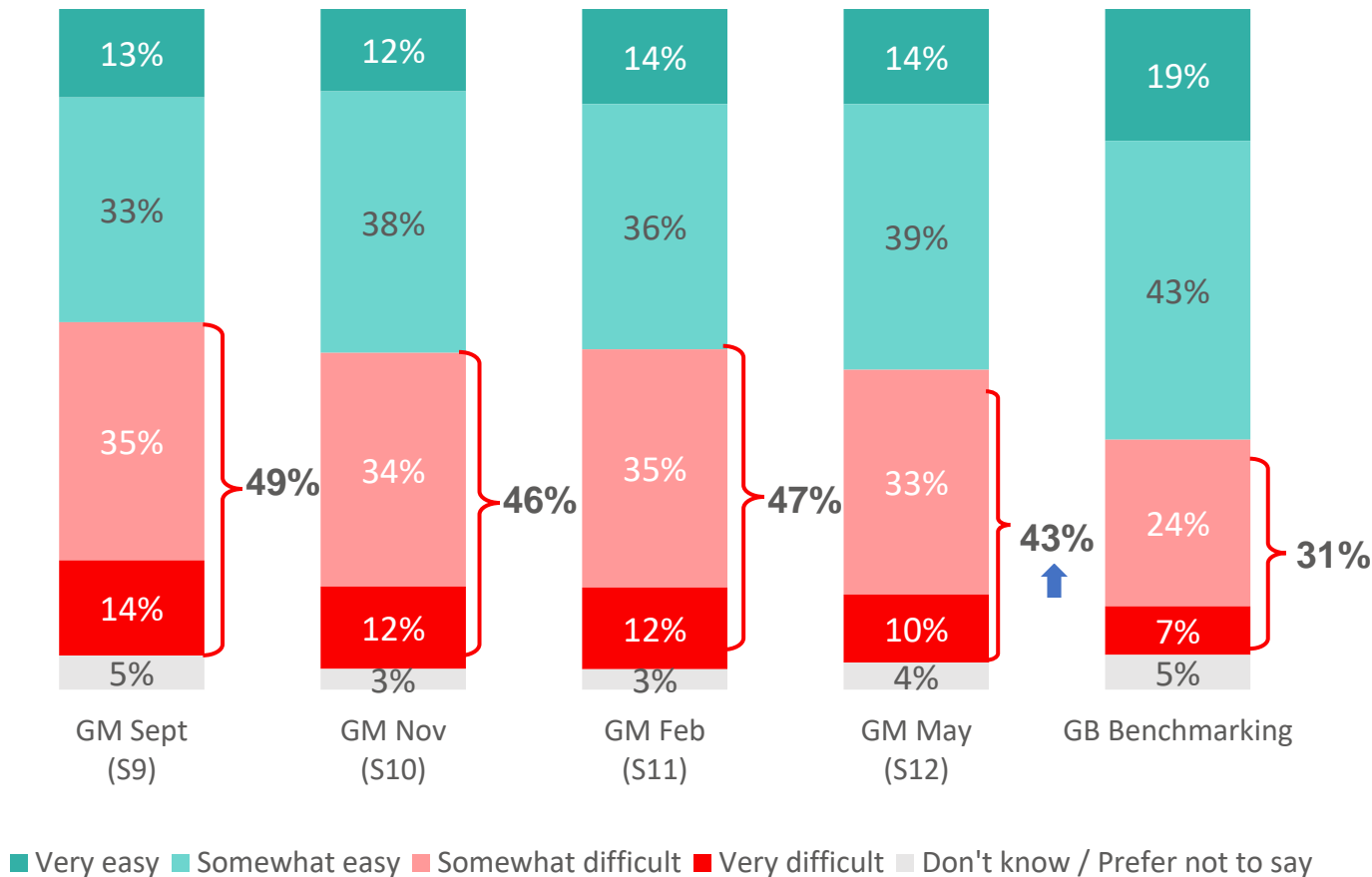
Can you afford an unexpected but necessary expense of £850?



CL2. Could your household afford to pay an unexpected, but necessary, expense of £850? Unweighted base: Survey 3, 1677; Survey 4, 1636 Survey 5, 1470; Survey 6, 1767; Survey 7, 1488; Survey 8, 1612; Survey 9, 1560; Survey 10, 1546; Survey 11, 1460; Survey 12, 1551 (All respondents). ONS data, based on national fieldwork 8th – 19th May 2024.

2 in 5 say they have **difficulty affording energy costs**, a slight decline since February, again suggesting positive movement, though is still significantly higher than the GB average. Those with a disability, parents, and renters remain more likely to be having difficulties

Ease of affording energy costs



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

Demographics:

- Those with a disability (60%); including mental ill health (65%), other disabilities (63%), mobility disabilities (62%) and sensory disabilities (58%)
- Those from within racially minoritised communities (53%); including Asian respondents (57%)
- Those aged 25-34 (52%)

Individual and/or family circumstance:

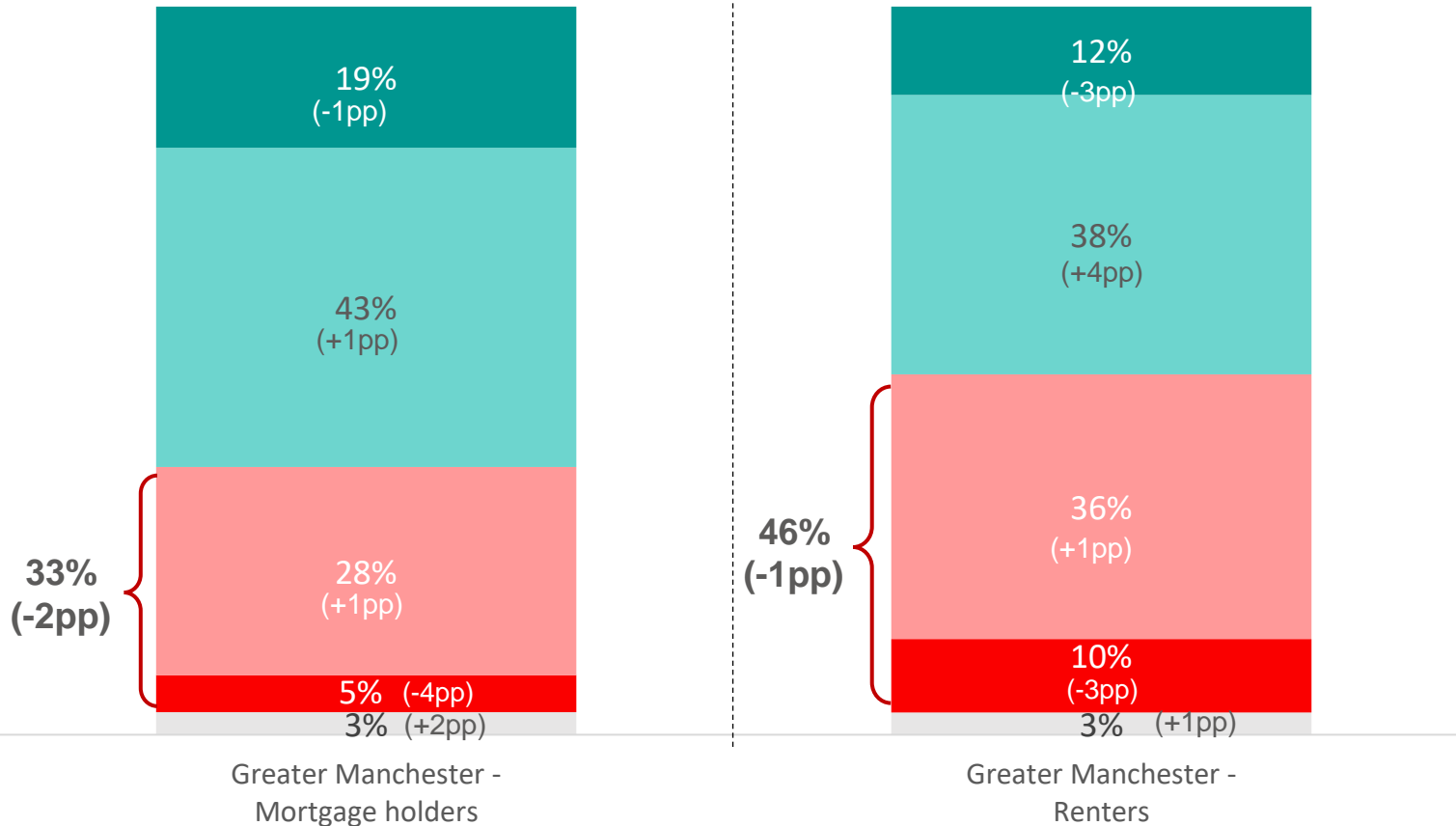
- Those who have had to borrow money or use more credit in the last month (70%)
- Those without the ability to save money in the next year (69%)
- Those renting (59%)
- Those earning below the Real Living Wage (54%)
- Those in households with 4+ adults (53%)
- Those in part time employment (52%), home makers (67%), not in work due to ill health or disability (75%) or not in employment (48%)
- Those working in the public sector (51%)
- Parents (51%); including those aged under 5 (54%), or aged 5-15 (50%)

* Subgroup analysis uses merged data from S10-12

↑↓ Significantly higher/lower than the GB Benchmark

The proportion of respondents finding it **difficult to afford either their mortgage or rental payments** has remained in line with February. Respondents more likely to find it difficult to afford these payments include those who are financially vulnerable

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 February (S11)

% who are significantly more likely to find it difficult to afford mortgage payments compared to the GM average (34%):

- Those from within racially minoritised communities (55%), Muslim respondents (65%)
- Those aged between 16-24 (50%)
- Those who have had to borrow money or use more credit in the last month (49%)
- Those earning below the Real Living Wage (49%)
- Those in Manchester (47%)
- Those not in employment (46%)

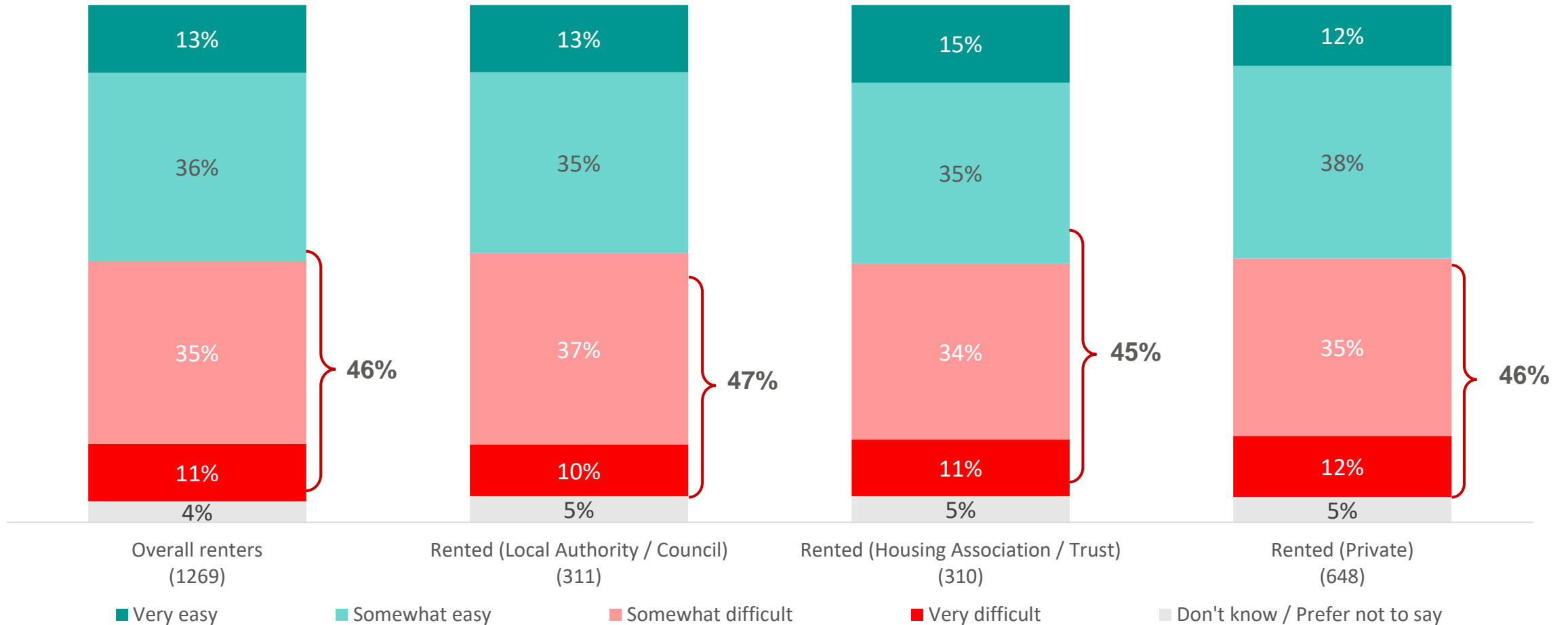
% who are significantly more likely to find it difficult to afford rent compared to the GM average (46%):

- Those who are financially vulnerable (69%)
- Those without the ability to look after their own health (62%)
- Those who identify as bisexual (61%)
- Those who have had to borrow money or use more credit in the last month (60%)
- Those unable to save money in the next year (59%)
- Those currently experiencing an issue in their home (54%)
- Parents (51%); including those with children aged 19-25yos (63%)

*subgroup analysis uses S10-12 data

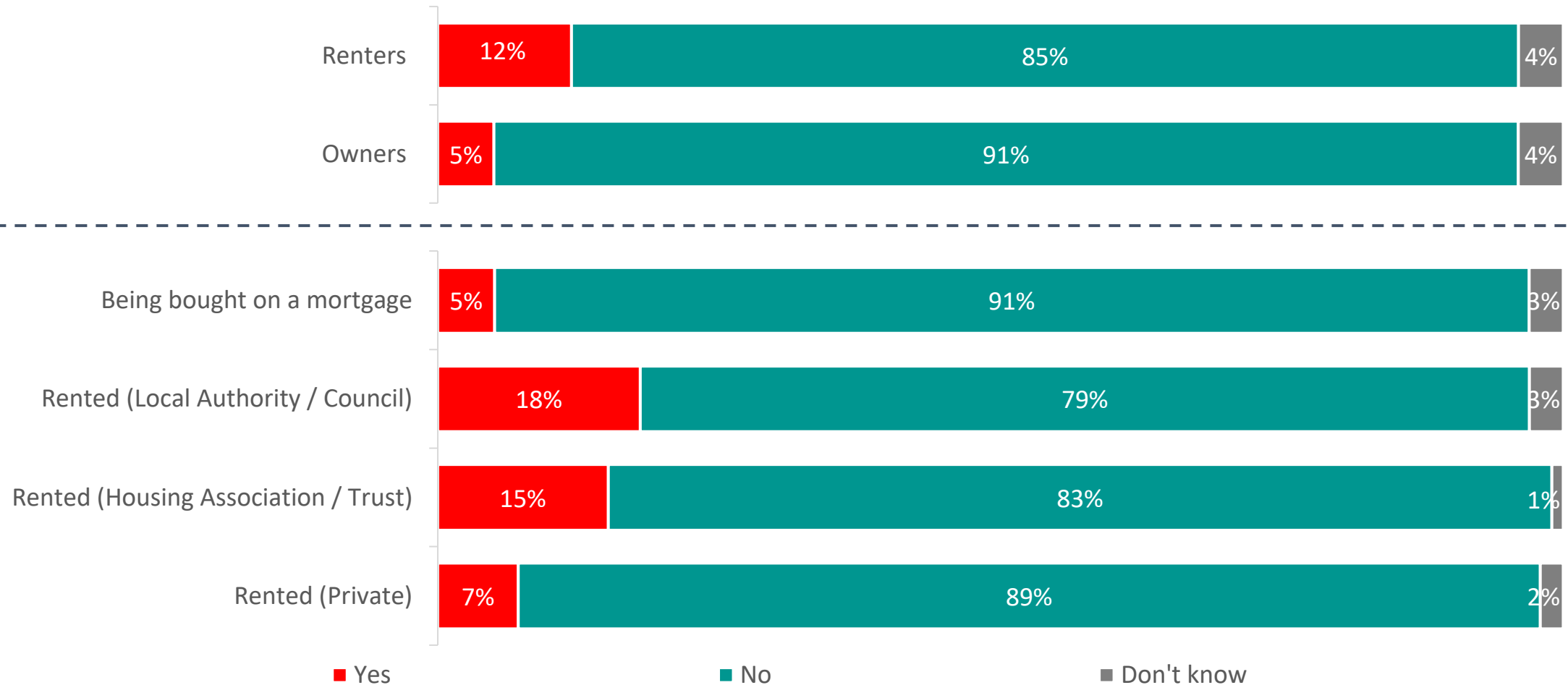
Using merged data across the past three surveys, almost half of renters have said they find it **difficult to afford rental costs**. Those renting from Local Authorities or Councils continue to report some difficulty.

Ease of affording rental payments (November – May)



Across the past three surveys, a higher proportion of respondents renting from the local authority continue to indicate they are **behind on their payments** (18%), when compared to respondents in Housing Association properties (13%) or those in the private rented sector (8%)

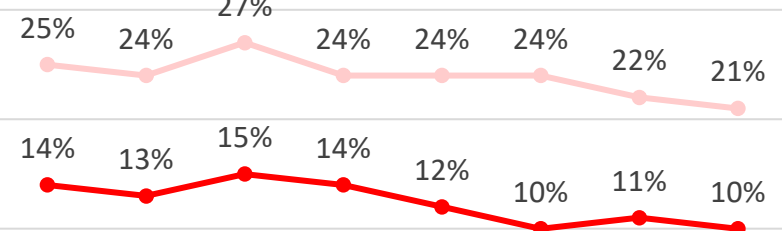
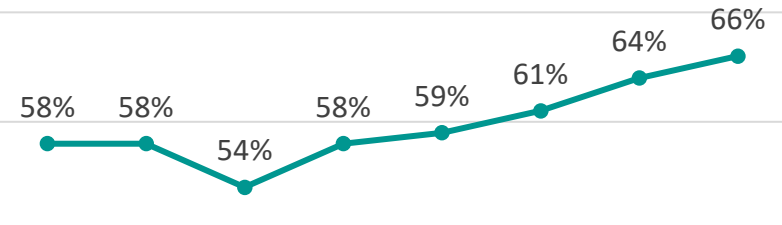
Are you behind on rent or mortgage payments? (Nov - May)



There has been a positive continuing trend in respondents saying they have not, at any point in the last 12 months, experienced any **food security issues**. Our more detailed food security questions (asked in survey 10) show the continuation of acute challenges for a significant minority, so the picture remains mixed

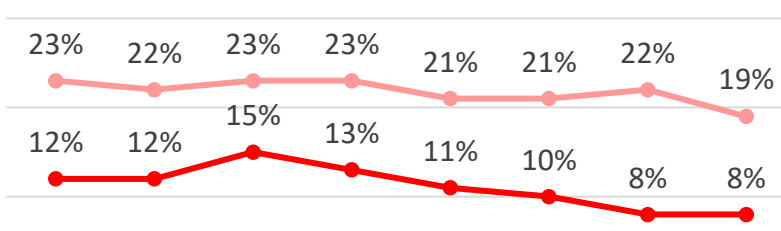
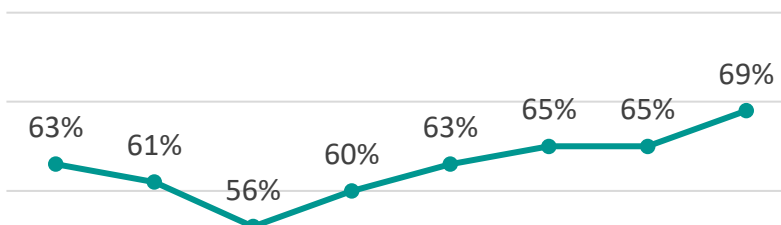
In the past twelve months have you...?

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



Jan (S5) March (S6) May (S7) July (S8) Sep (S9) Nov (S10) Feb '24 (S11) May '24 (S12)

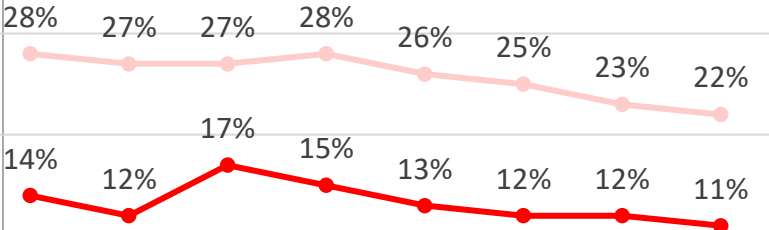
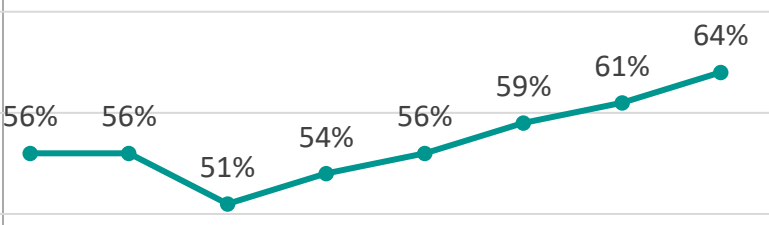
...found the food you bought didn't last and you didn't have money to get more



Jan (S5) March (S6) May (S7) July (S8) Sep (S9) Nov (S10) Feb '24 (S11) May '24 (S12)

● Never ● Sometimes true ● Often true

...been unable to afford to eat balanced meals

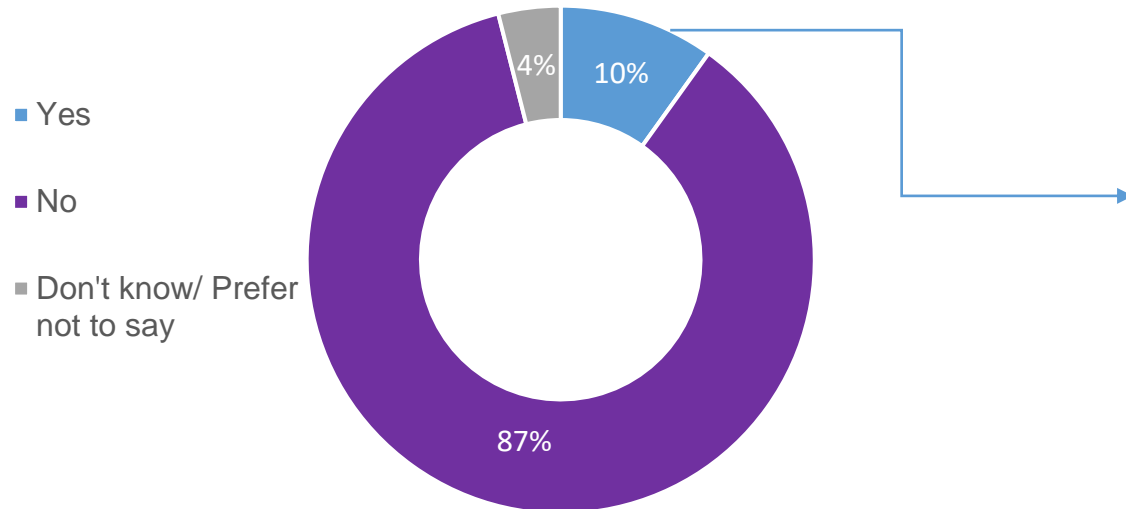


Jan (S5) March (S6) May (S7) July (S8) Sep (S9) Nov (S10) Feb '24 (S11) May '24 (S12)

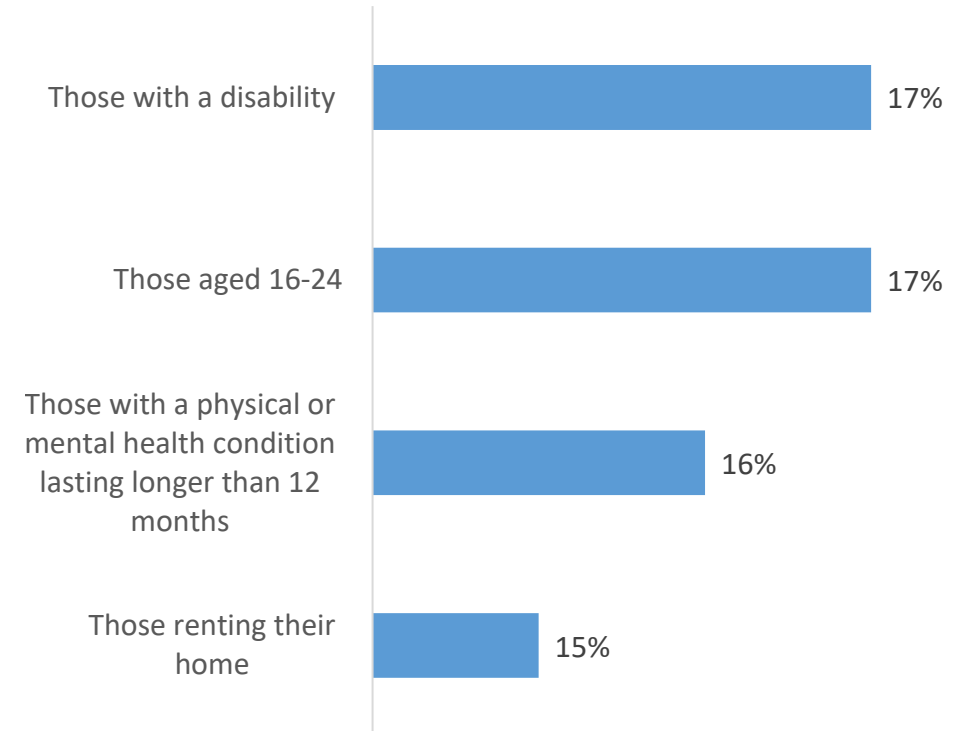
B2. How true would you say the following statements are when applied to your household for the last 12 months?
 Unweighted base: 1,442 (S3); 1,366 (S4); 1,220 (S5); 1,517 (S6); 1,235 (S7); 1,362 (S8), 1,312 (S9), 1296 (S10), 1201 (S11), 1300 (S12). Nb Respondents who said 'don't know' or 'prefer not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

1 in 10 have been unable to access an NHS health or social care service due to cost implications. Those more likely to have not been able to access a service include respondents with a disability and those aged 16-24

In the last month has there been an occasion(s) when have you been unable to access an NHS health and /or social care service due to cost implications?*



Those more likely to have been unable to access an NHS health or social care service includes...*



*Note: This is first time the cost-of-living impact on accessing NHS services was explored, and so these results should be taken as exploratory. Future waves will consolidate these findings, and will probe on barriers to access

*Findings are from S12 only so sub-group analysis should be approached with caution

Nearly half (47%) of respondents who have **paid for a care package** in the past 12 months have had to cut back or cancel this due to not being able to afford it. 2 in 5 report having been behind in payments for care packages.

Have you paid for a care package from your local authority in the past 12 months?

8%

have paid for a care package

4% have paid for a care package for themselves

4% have paid for a care package for their family members

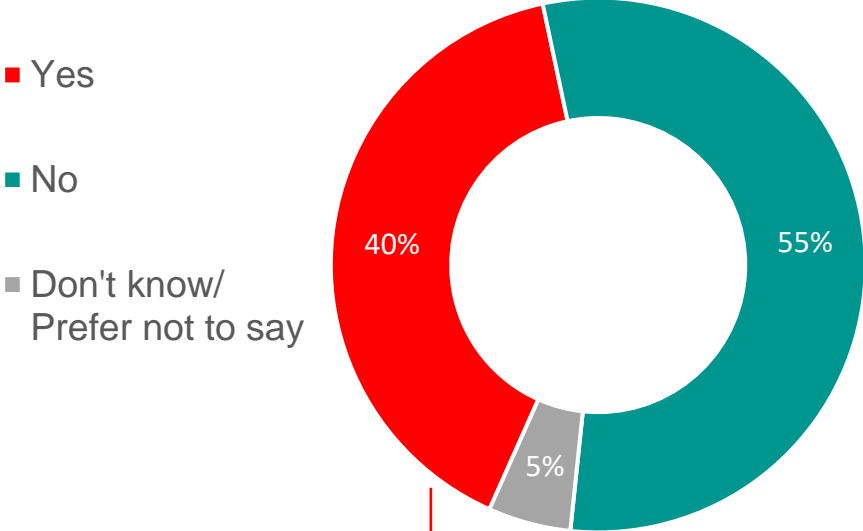
There has been no significant change in these metrics since February '24

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



■ Yes ■ No ■ Don't know/ Prefer not to say

Among those who have paid for a care package (approaching 200 GM respondents over 2 survey waves), in the last 12 months have you ever been behind in your payments for your care package?



62% of those who have been behind in payments for their care package have received contact from a debt collector about these arrears

QL30 Do you pay for a care package from your Local Authority? QCL31. Have you had to cut back or cancel your care package because you can no longer afford to pay for it? QCL32. In the last 12 months, have you ever been behind in your payments for your care package? QCL33. Have you received contact from a debt collector about these arrears? Base: All respondents: S11 + S12 (3011); All who pay for care packages for themselves or families (193)

Digital inclusion

(Findings from winter 2023 and first half of 2024 merged into groups of three waves, telephone / face to face samples only)

Overview and context	<u>page 70</u>
Digital inclusion key findings	<u>page 71</u>
Digital inclusion detailed findings	<u>pages 72-78</u>

Digital inclusion – context

Sampling

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

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

Merged Findings

For this report, we have merged findings for survey 12 (May 2024), with those from survey 11 (February 2024) and survey 10 (November 2023) to provide a robust sample size for sub-group analysis. Note that as survey 12 used a different methodological approach (with face-to-face interviews as opposed to telephone interviews), the merged sample contains different methodologies.

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

Change in Methodology

Survey 12 is the first time where the face-to-face methodology has been used. While our sampling approach, alongside the interviewer-led interviewing, is comparable with a telephone approach, changes in who we are able to talk to has impacted the results in this section of the report. This is because those who are recruited to take part in telephone research are often recruited through online methods or live in homes which are generally more likely to be connected to the internet and phonline in combination. Both factors reduce the chance that they will be digitally excluded. Therefore, while this impacts the trackability of levels of digital inclusion, by changing approach allows us to provide a truer understanding of the extent to which digital exclusion impacts on the residents of Greater Manchester. BMG is undertaking further analysis on the extent of this mode impact to allow us to directly compare the two datasets.

** Base sizes: Survey 10 (250), Survey 11 (259), Survey 12 (251)*

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

Digital inclusion – Key findings

EXPERIENCE OF DIGITAL EXCLUSION (survey 10+11+12 combined data)

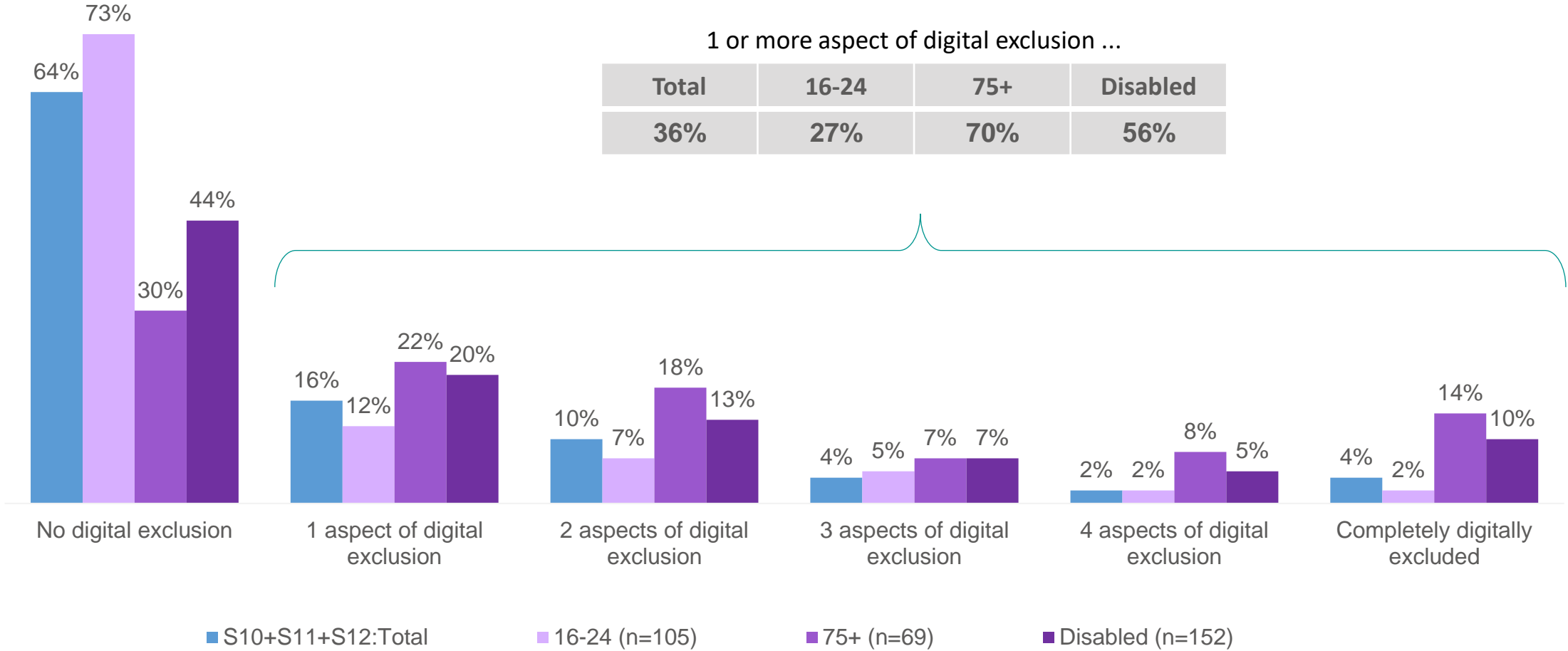
- Over a third (36%) of respondents said that their household experienced some form of digital exclusion
- 16% of Greater Manchester households experienced a single aspect of digital exclusion, while 4% have experienced all 5 aspects of digital exclusion
- Overall levels of digital exclusion (36%) have increased from surveys 7-9 (32%)
- There have been changes in both respondents aged 75+ and disabled respondents reporting any form of digital exclusion, though 16–24-year-olds digital exclusion has remained steady:
 - 70% of those aged 75+ now say they have experienced one or more aspect of digital exclusion, compared to 62% in surveys 7-9
 - 56% of disabled respondents report experiencing at least one form of digital exclusion, rising from 40% in surveys 7-9
 - 27% of 16-24 year olds now say they have experienced one or more aspect of digital exclusion, in line with 28% reported in surveys 7-9
- **However**, the change in methodology to face to face has increased the likelihood of interviewing those that are digitally excluded, suggesting the change highlighted above reflects the methodology change, rather than an underlying change in levels of experienced digital inclusion. Subgroups have seen a larger shift in the findings, due to the methodological change impacting smaller base sizes more

CONFIDENCE USING DIGITAL SERVICES (survey 10+11+12 combined data)

- 18% of respondents say either they (13%) or someone in their household (10%) is not confident using digital services online. Modal changes have seen those reporting on themselves experience more digital exclusion, whilst others in their household have generally remained in line with previous waves
- Using subgroup analysis from S10-12, this proportion is also higher among older cohorts aged 75+ (59%) and disabled respondents (33%)

Over a third of respondents report experience of **at least one aspect of digital exclusion in their household**. This rises to 56% of disabled respondents and 70% of respondents over 75

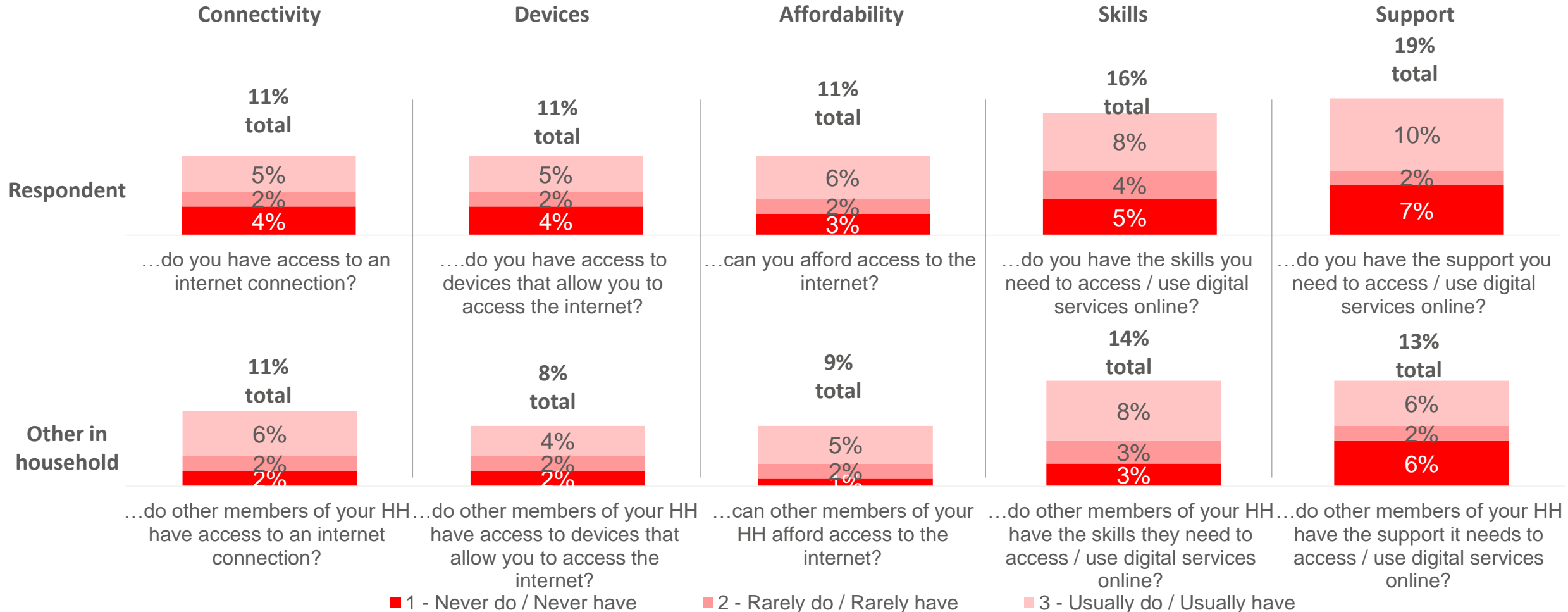
Number of aspects of digital exclusion experienced (November - May 2024)



D111. How often...? Unweighted base: 760 (Telephone / Face to face respondents) Prefer not to say not shown. Question in was asked as a grid, between "you" and "others in your household". The data on this slide shows the percentages of households where there is someone (either you or others) who has said they are digitally excluded. *Aspects of digital exclusion = consistent and reliable access to an internet connection at home; to devices that allow access to the internet; affording access to the internet; skills needed to access and use digital services online; support needed to access and use digital services online

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

How often...? (Respondents reporting digital exclusion)*
(November – May 2024)



DI_11. How often...? Unweighted base: 760, Survey 10, 250, Survey 11, 259, Survey 12, 251 (Telephone respondents) *Prefer not to say, 4, and 5 not shown.

Those **aged 75+ continue to consistently be** far more likely not to have access to enable them to get online all or most of the time, or the skills and support to do so, this is consistent with previous waves

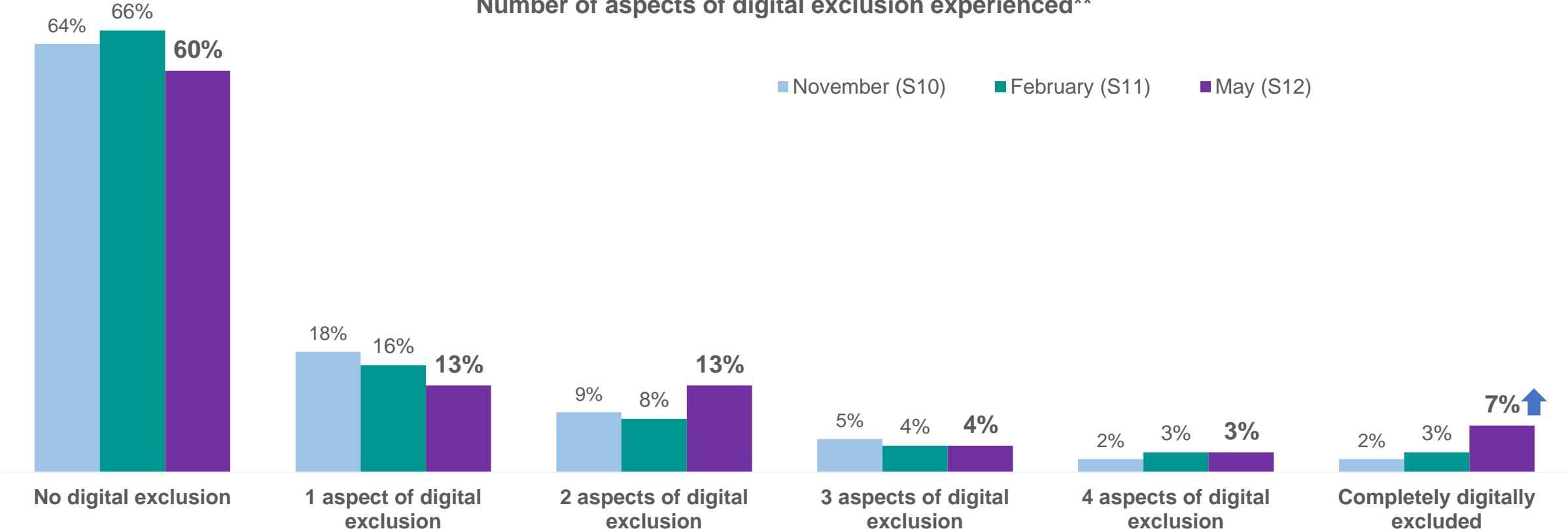
How often do you/do others in your household...? (Showing households without the access/skills to get online all/most of the time)
November – May 2024

	Total	Aged 16-24 (n=105)	Aged 75+ (n=69)	Disabled respondents (n=152)
...have consistent and reliable access to an internet connection at home?	11%	6%	23% ↑	22% ↑
...have consistent and reliable access to devices that allow access to the internet and use digital services online?	10%	9%	27% ↑	17% ↑
...can afford access to the internet?	10%	9%	26% ↑	21% ↑
...have the skills they need to access and use digital services online?	12%	5%	47% ↑	25% ↑
...have the support needed to access and use digital services online?	16%	8%	40% ↑	22%

↑↓ Significantly higher/lower than total

Wave-on-wave trends: May shows that there has been a significant increase in those who are completely digitally excluded, with an increase of 4pp since February. However, it is highly likely that these changes are driven by sample composition – see slide 93 for more details

Number of aspects of digital exclusion experienced**

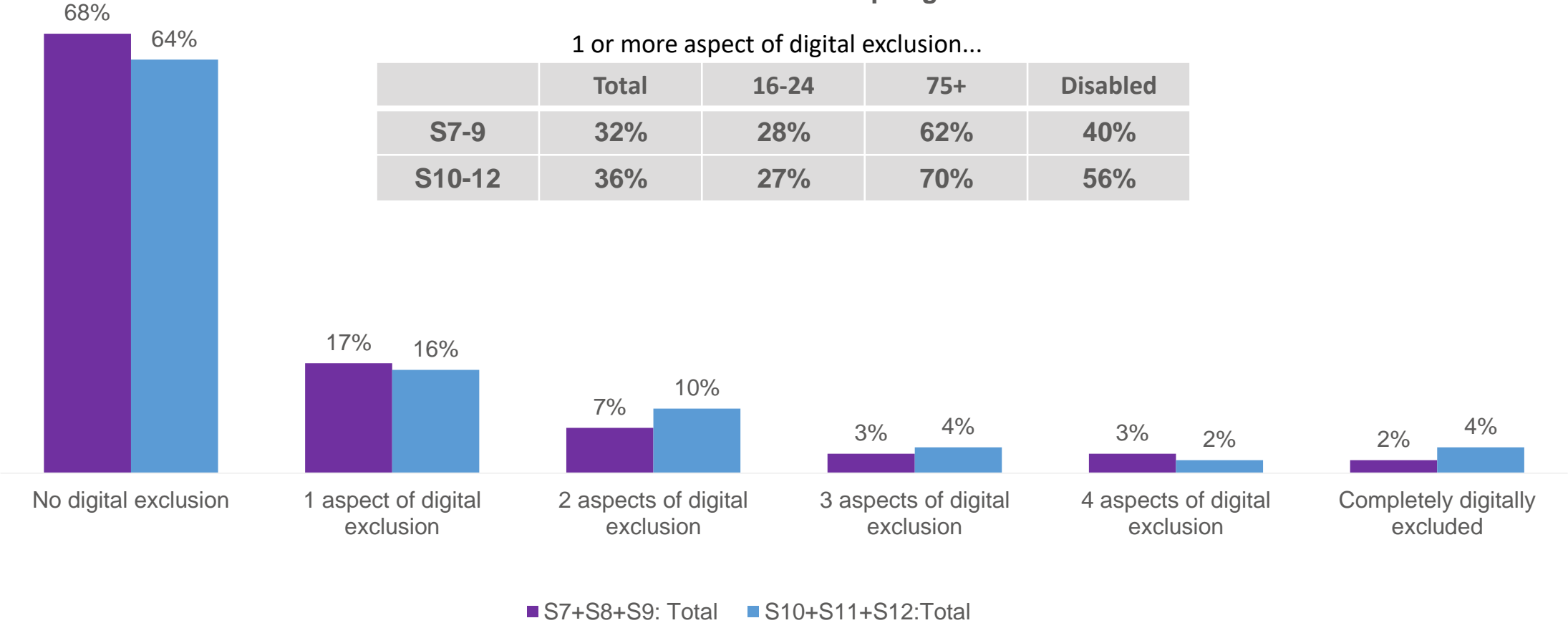


↑ ↓ Significantly higher/lower in previous survey

Unweighted base: S10+11+12 total; 760; Survey 10, 250, Survey 11, 259, Survey 12, 251 (Telephone respondents/ Face to Face Respondents) **Aspects of digital exclusion = consistent and reliable access to an internet connection at home; to devices that allow access to the internet; affording access to the internet; skills needed to access and use digital services online; support needed to access and use digital services online

Longer term trends: It appears that the proportion of respondents experiencing any form of digital exclusion has increased, with respondents aged 75+ or those with a disability reporting substantially higher levels of digital exclusion. Again, sample composition is highly likely to be impacting this data

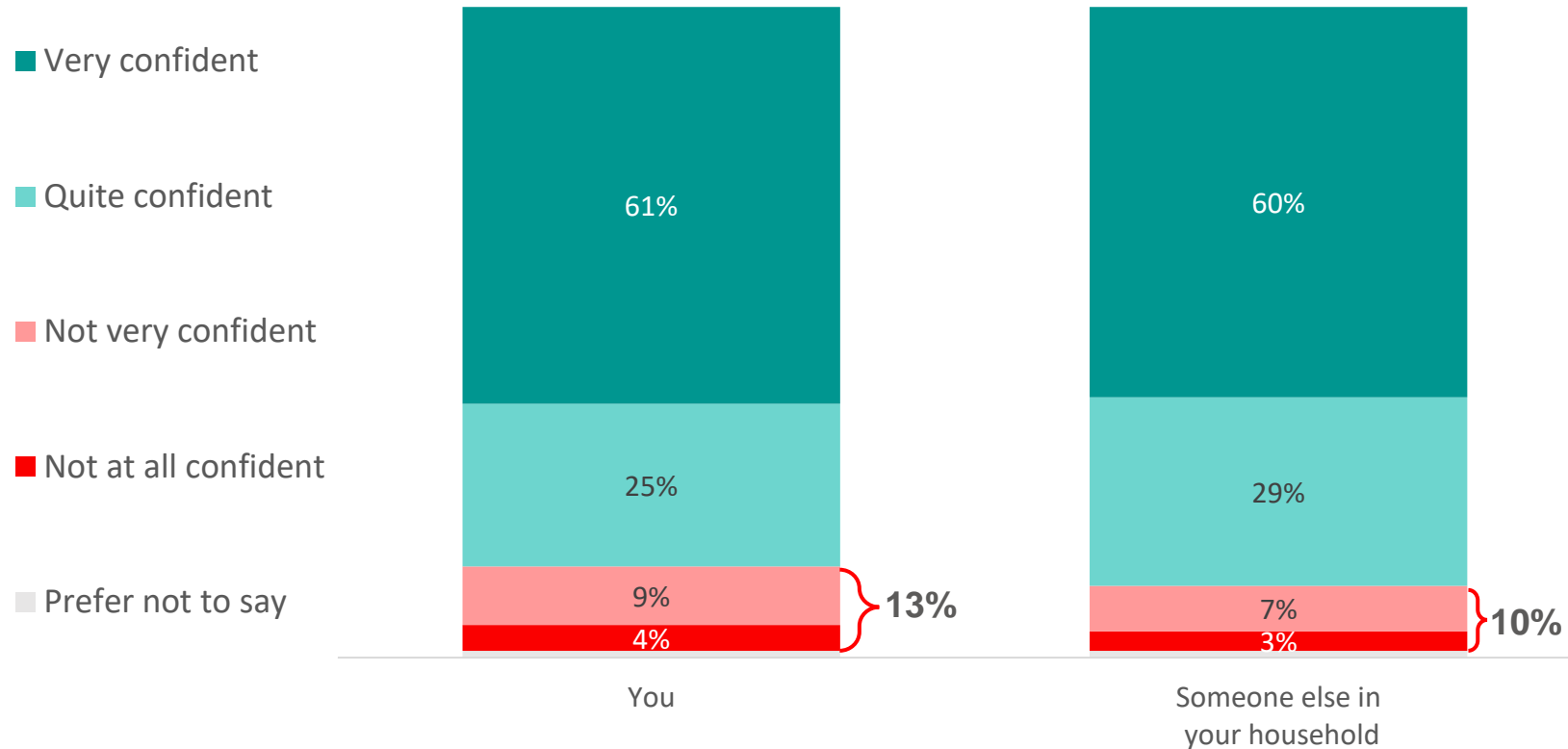
Number of aspects of digital exclusion experienced
Autumn/Winter 2024 vs. Spring 2024



DI11. How often...? Unweighted base: S7-9 (749), S10-12 (760) (Telephone respondents / Face to Face respondents) Prefer not to say not shown. Question in S6 onwards was asked as a grid, between "you" and "others in your household". The data on this slide shows the percentages of households where there is someone (either you or others) who has said they are digitally excluded. *Aspects of digital exclusion = consistent and reliable access to an internet connection at home; to devices that allow access to the internet; affording access to the internet; skills needed to access and use digital services online; support needed to access and use digital services online

Just over 1 in 10 respondents say they are **not confident using digital services online**, with 1 in 10 saying others in their household are not confident. This has largely remained in line with February. Those aged 65+ living on their own, and disabled respondents are more likely to not be confident.

How confident are you in using digital services online? (November – May 2024)



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

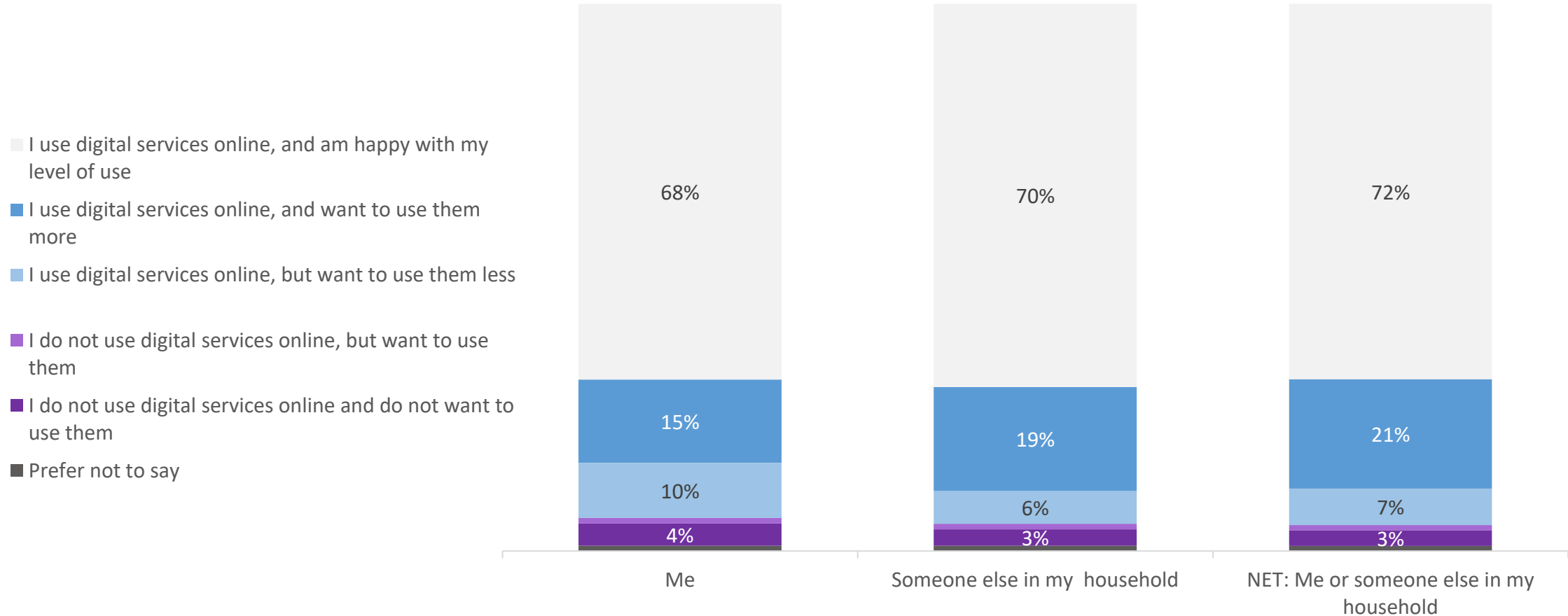
Demographics:

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

18% of all households have someone who is not confident in using digital services online

Around 1 in 5 (21%) of 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 (November – May 2024)



Appendix

Methodology	<u>page 80</u>
Sample information	<u>page 81</u>
Key demographics	<u>page 82</u>
Significance Testing and statistical difference	<u>page 83</u>

More detail on changes in survey methodology

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

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

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

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

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

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

Sample information

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

Key demographics (before weighting applied)

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

Significance Testing and statistical difference – technical note

- Where relevant, differences in findings for specific demographic and other population characteristics compared to the Greater Manchester average are reported. These differences are only highlighted where they are significantly different statistically (at the 95% level of confidence) compared with the 'total' figures (i.e. the Greater Manchester average). Significant differences are shown in charts and tables with the use of up and down arrows.
- The confidence interval is an estimate of the amount of uncertainty associated with a sample. A 95% confidence interval is where you can be 95% certain a difference is statistically significant.
- The sample size included in each wave of the survey has differed (see the previous slide for details on the size).
- At 95% confidence this means the size of the sample affects the percentage difference required for significant changes. The bigger the sample size, the smaller the difference required to be statistically different.
- The percentage difference required is also impacted by how many or few people are providing a given answer. For example, a percentage nearer to 10% or 90% provides greater certainty than a value of 50%, and therefore requires a smaller difference to be significant. As such, please remember that the difference required will be lower when dealing with percentages higher or lower than 50%.

Carried out on behalf of Greater
Manchester partners by

