GREATER MANCHESTER
DOING THINGS DIFFERENTLY

Greater Manchester Residents' Survey

Survey 18 (main report)

June 2025

Fieldwork conducted 24th April – 12th May 2025

Report contents

Introduction and methodology

Background

- This report presents summary findings for a quantitative **survey carried out between 24th April and 12th May 2025, with a representative sample of 2,298 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, local area, material deprivation, further education for young people and digital access.**
- Data from May 2025 (survey 18) is sometimes presented alongside that from similar Greater Manchester resident surveys undertaken in February 2025 (survey 17) and December 2024 (survey 16). A change to the fieldwork approach (relating to survey frequency) will be explained further on the next slide.
- The following approaches have been used, identified as most appropriate for the datasets in each theme:
  - health and wellbeing – data from individual surveys is shown separately
  - local area – data from individual surveys is shown separately, except in instances where merged data from surveys 16, 17 and 18 is used to support commentary on trends for specific sub-groups
  - material deprivation – data from survey 18 only is shown, as this is a new topic
  - Further education – data from survey 18 only is shown, as this is a new topic
  - digital inclusion – merged data from surveys 16,17 and 18 is used drawing on face-to-face responses only
- To provide a national comparison, where available, **Greater Manchester findings are presented alongside the most recent benchmarking data from relevant national surveys** – for example, published figures from the Office for National Statistics (ONS) and the Department for Culture Media and Sport (DCMS).
- These surveys are intended to provide regular ongoing insights for Greater Manchester organisations and partners to help inform how and where to target support, communications / engagement activities and resources to improve the lives of Greater Manchester residents.

Methodology

- Between February 2022 and February 2025, BMG Research has undertaken surveys on an approximately bi-monthly basis, each comprising circa 1,500 residents from across Greater Manchester.
- In surveys 12 to 17, the sample was comprised of approximately 750 online panel respondents, 250 face-to-face respondents, and 500 online rapid respondents. This follows a change from telephone and online river responses from surveys 1 to 11.
- **From survey 18 (April 2025) and for the remainder of 2025/26, fieldwork will be undertaken on a quarterly cycle,** resulting in a larger sample size per wave of 2,250 but the same annual number of respondents interviewed:
  - 1,050 online panel respondents
  - 500 online rapid respondents
  - 375 face-to-face respondents, and
  - 325 online ‘river sampled’ respondents
- This mix of online and face-to-face surveying was agreed so that the most representative and robust sample of Greater Manchester residents can be regularly sourced within available time and budget. This new methodology will be used for the remainder of the 2025/26 financial year.
- Each survey is designed to take **15 minutes** on average for respondents to complete; however, due to the emotive nature of some topics covered, face-to-face interviews tend to take longer than this.
- **Quotas** are set to ensure the sample broadly reflects the profile of Greater Manchester’s population by gender, age, ethnicity and disability, with further consideration of wider protected and key characteristics.
- **Weights** have been applied to the data gathered to ensure the sample matches the population profile by age, gender, ethnicity, disability and locality, and to ensure consistency between individual surveys.

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

Report contents and guidance

Identifying significant differences / change

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

Sample sizes

- On some questions, **responses have been filtered only to include respondents to whom the question is relevant** (e.g. those in work, or with children), and so bases are lower than the full sample of 2,298 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.

Executive Summary

Executive Summary

Health and Wellbeing

- Overall levels of **life satisfaction** (66%), feeling that the things they do in their life are **worthwhile** (67%) and **happiness** (67%) remain at high levels, particularly when compared to previous surveys, continuing a positive trend since October. **Anxiety** levels remain stable from levels recorded in February 2025. You can find out more here.
- Levels of "**hopefulness about the future**" (78% hopeful) compare favourably to the latest figures being seen by the ONS across GB as a whole (69%). Sentiments about "fair treatment by society" are also significantly higher than GB figures (60% GM cf. 50% GB). You can find out more here.
- **The Health Confidence Score for GM** has increased since December 2024, by +0.6 to 72.7, the highest score recorded. However, the gap between the overall GM population and the disabled population widens after narrowing slightly in December 2024. You can find out more here.

Your local area

- Three quarters (74%) of respondents are **proud of their local area**, significantly higher than February 2025. You can find out more here.
- 3 in 10 (29%) of GM respondents **feel lonely** at least some of the time, significantly higher than benchmarking for Great Britain (24%). You can find out more here.
- Although 82% agree their **local area is one where people from different backgrounds get on well together**, some respondents do not feel this way – the most commonly reported reasons for this are groups keeping to themselves, anti-social behaviour, and prejudice/racism in the local area. You can find out more here.
- 82% of respondents want to have a say about what happens in their local area. Approaching a third feel particularly strongly ('definitely agree') that this is something they want. You can find out more here

Material deprivation

- New questions in May 2025, asked about material deprivation, exploring poverty in the context of everyday living standards. You can review the 9 dimensions (themes) included in the survey here.
- One quarter (25%) of **parents with children under 18 are considered materially deprived**, along with a third (33%) of **working age adults** and a fifth (21%) of **pensioners**.
- Commonly experienced elements of material deprivation among **parents with children** include: not being able to put money aside for unexpected expenses, the inability to cover the cost of repairs, and not having home contents insurance. More here.
- Amongst **working-age adults**, the most common problems experienced were: regular money worries at the end of the month, being unable to put money aside for unexpected expenses, and not being able to cover cost of repair or to replace appliances. More here.
- **Pensioners** also report difficulties in putting money aside, experience money worries, and flag issues with keeping their home adequately warm in cold weather. More here.

Further education for young people

- In another new theme explored this survey, questions were asked about future pathways for young people.
- Half (52%) of respondents say that both academic and technical / vocational pathways are equally as good as each at **better preparing young people for future jobs**. A quarter (26%) say that technical / vocational pathways are better, while 1 in 10 (10%) say that academic pathways are better. You can find out more here.
- 4 in 5 parents with children aged under 25 would feel **confident talking to their child** about exploring an academic pathway (85%) and a technical or vocational pathway (81%). You can find out more here.
- 65% of parents of children aged 12-25 said they have **looked for information on academic or technical / vocational pathways before**. You can find out more here.

Health and wellbeing

Health and wellbeing – context

The 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.

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

From July 2024 onwards, this survey also includes additional measures of wellbeing, around hope for the future and fairness of treatment by society. These questions mirror those from ONS' UK Measures of National Well-being, allowing for comparison of Greater Manchester and national results

Returning to the Greater Manchester Residents' Survey (last seen in December 2024), in May 2025 we also asked 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)

SELF-REPORTED WELLBEING

- Two-thirds (66%) of GM respondents record high life satisfaction, which remains in line with recent waves. The proportion of those who say they have ‘very high’ life satisfaction has remained high this wave (23% of respondents), now reaching its second-highest score so far (24% in December 2024 was the highest rate of those having ‘very high’ life satisfaction in the survey so far).
- 28% of respondents say things they do in their life are ‘very worthwhile’ (score 9-10) – a score which has remained the same for the past few waves and remains the joint-highest score recorded across our tracking period.
- Over one-quarter (27%) of respondents say they feel a ‘very high’ level of happiness – this is now the highest recorded score so far for this metric, continuing an upward trend recorded since July 2024. At the same time, there has been a significant drop in those who say they have ‘low’ levels of happiness, dropping by 3pp to 12% - this is now the lowest score recorded so far.
- While trends in relation to ‘satisfaction’, ‘worthwhile’ and happiness’ wellbeing strands are positive, the proportion of respondents who say they have a ‘very high level’ of anxiety remains in line with previous waves at 38%. Otherwise, all other levels of anxiety have also remained steady, with no significant changes since February.
- Those with a disability continue to report lower levels of low life satisfaction and more likely to feel highly anxious – a trend that has been reported in previous waves. Other subgroups more likely to have lower life satisfaction include renters (21%) and those living with a friend or family (19%). Subgroups that are more likely to say they felt highly anxious the day previous include those who have completed an apprenticeship (47%) and those with a lower household income (49%).

HOPE AND FAIRNESS*

- Just under 4 in 5 (78%) of respondents say they feel hopeful about their future. Positively, hopefulness for the future remains significantly higher in Greater Manchester compared to the rest of GB (78% GM; 69% GB).
    - Respondents not in work due to ill health or a disability are among those who have low levels of hopefulness at 38%, as well as those who feel they are treated unfairly by society (31%).
- 3 in 5 (60%) of respondents feel they are treated fairly by society, higher than across GB and 3pp higher than figures reported for GM most recently (previous waves’ data combined from S15-S17).
    - Respondents more likely to feel that society treats them unfairly includes those with a mixed ethnicity (24%) and those not heterosexual (29%).

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* Current GB benchmarking figures taken from the UK Measures of National Well-being - Office for National Statistics (ons.gov.uk). This figure was published 11 February 2025 and relates to fieldwork undertaken on behalf of ONS between 4 Dec 2024 to 5 Jan 2025.

Health and wellbeing– key findings (2 of 2)

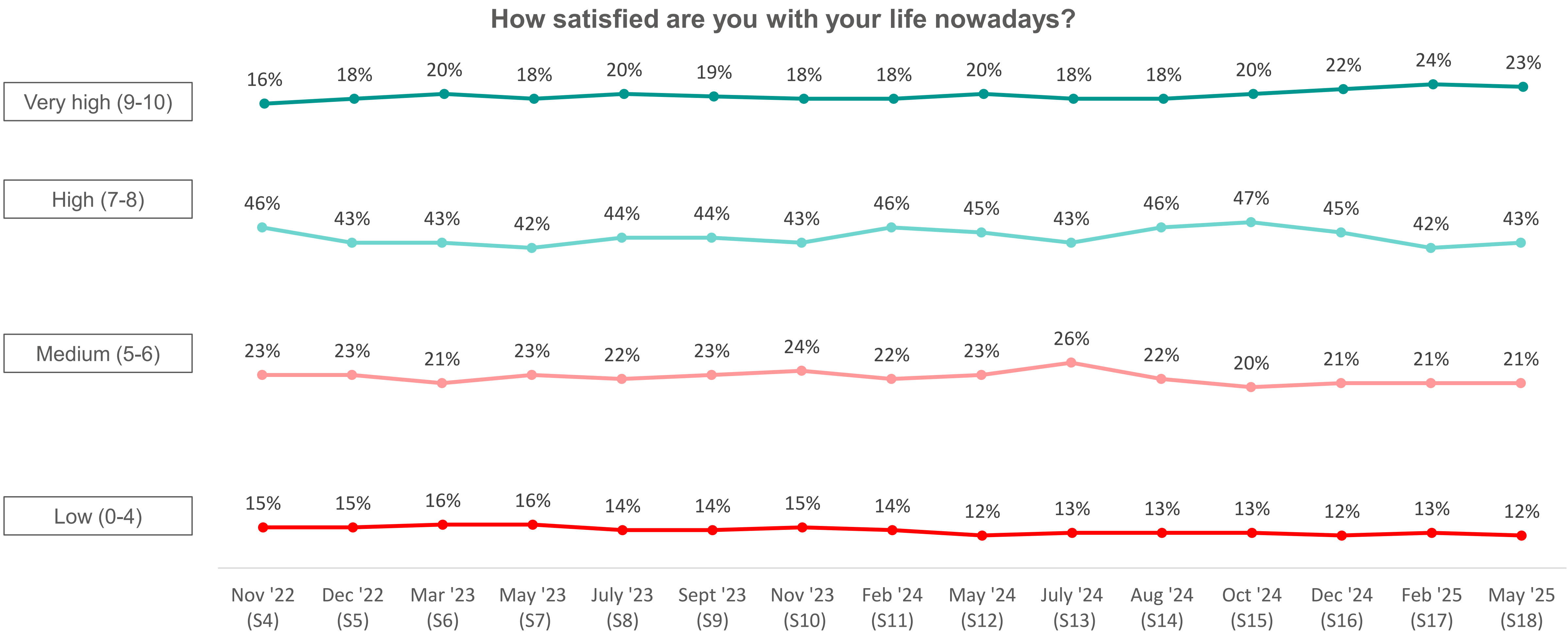
HEALTH CONFIDENCE

Since December 2024 (when health confidence was last surveyed), there have been positive increases seen across all the health confidence metrics.

- Self management – “I can look after my own health” - has increased from 72.1 to 72.4
- Knowledge – “I know enough about my health” - has increased from 67.6 to 69.0
- Access – “I can get the right help if I need it” - has increased from 67.6 to 67.8
- Shared decisions – “I am involved in decisions about me” - has increased from 80.9 to 81.8

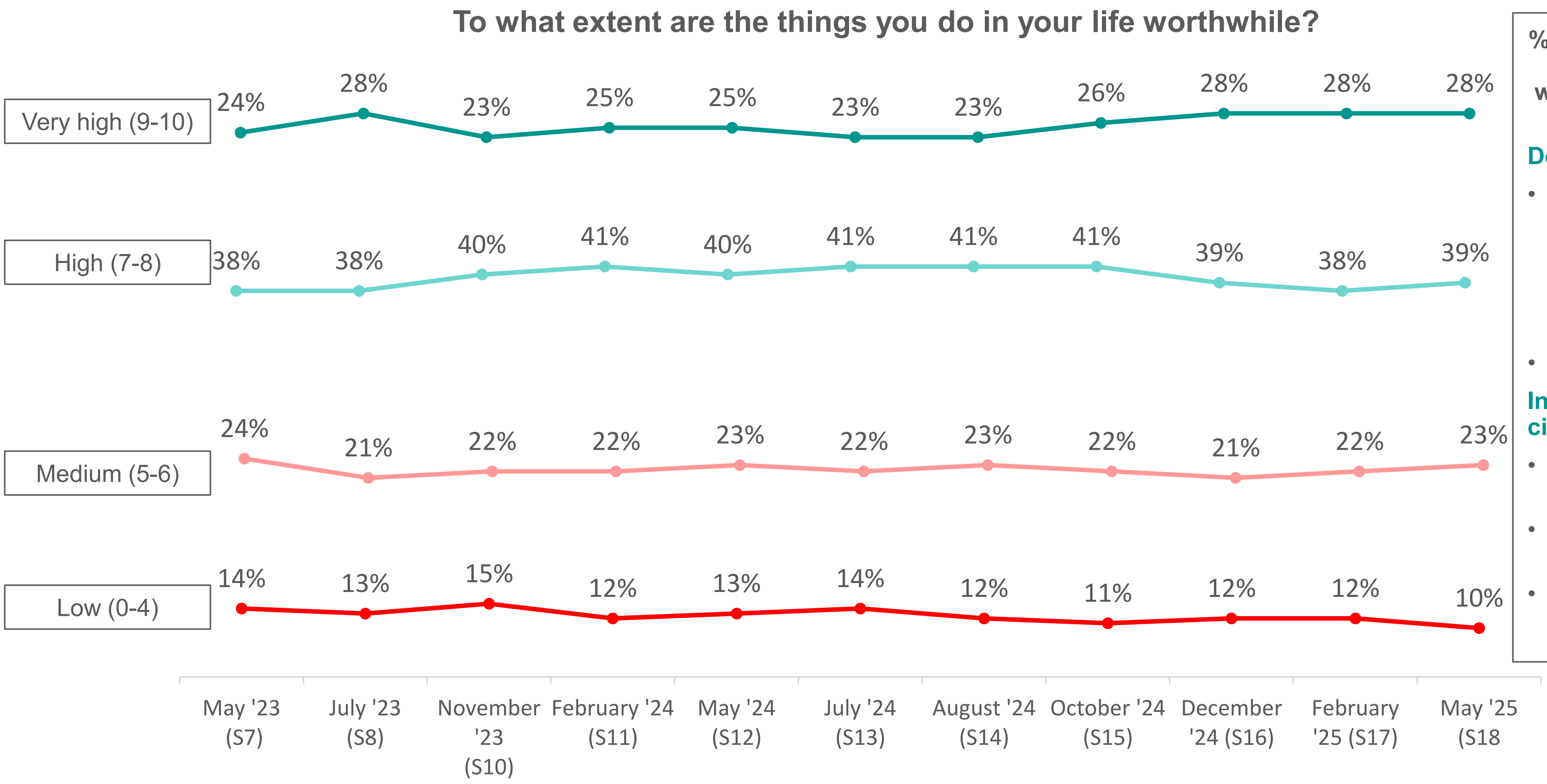
- As a result, the overall Health Confidence Score has consequently increased, rising by 0.6 from 72.1 to 72.7.
- Taking a longer-term view of health confidence also reflects the positive nature of the figures from May’s fieldwork. Latest results for three of the four metrics (all except “Shared Decisions”) are the highest since tracking began two years ago.
- This wave, the survey revisited the HCS for disabled respondents. As seen in previous analyses, health confidence is much lower than the overall GM HCS across all metrics (with an overall health confidence score of 62.8).
    - The gap in HCS between disabled respondents and the GM average appeared to be narrowing in October and December 2024. This survey has though observed a widening in this gap, with results returning back to levels last seen in August 2024 (gap of 10.6).
    - When looking further back to two years ago in May 2023 (S7), the gap recorded between the HCS for disabled and non-disabled respondents was the same as seen in May 2025 (gap of 9.9).

Life satisfaction remains high this wave. The proportion of respondents with very high satisfaction stayed largely in line with the all-time high recorded in February 2025 (23% cf. 24%), while levels of low satisfaction were equal to the Residents' survey all-time low (12%).



A1. Where 0 is "not at all" and 10 is "completely"…
Unweighted base: Greater Manchester Residents Survey 4: 1636; Survey 5: 1470; Survey 6: 1767, Survey 7: 1488, Survey 8: 1612, Survey 9: 1560, Survey 10: 1546, Survey 11: 1460, Survey 12: 1551, Survey 13: 1540, Survey 14: 1482, Survey 15: 1517; Survey 16: 1523, Survey 17: 1515, Survey 18 (May '25): 2298

Respondents who say things they do in their life are very worthwhile (score 9-10) has remained the same since the previous wave, still a joint-high figure of 28%. However, those with disabilities continue to be significantly less positive that the things they do in their life are worthwhile.



% who felt that the things they do in their life are not at all worthwhile ccompared to GM average (10%)*:

Demographics:

- Those who have a disability (23%), including mental ill health (34%), a learning disability(27%), a sensory disability (23%), or a mobility disability (22%)
- Gay women or lesbian (24%)

Individual and/or family circumstance:

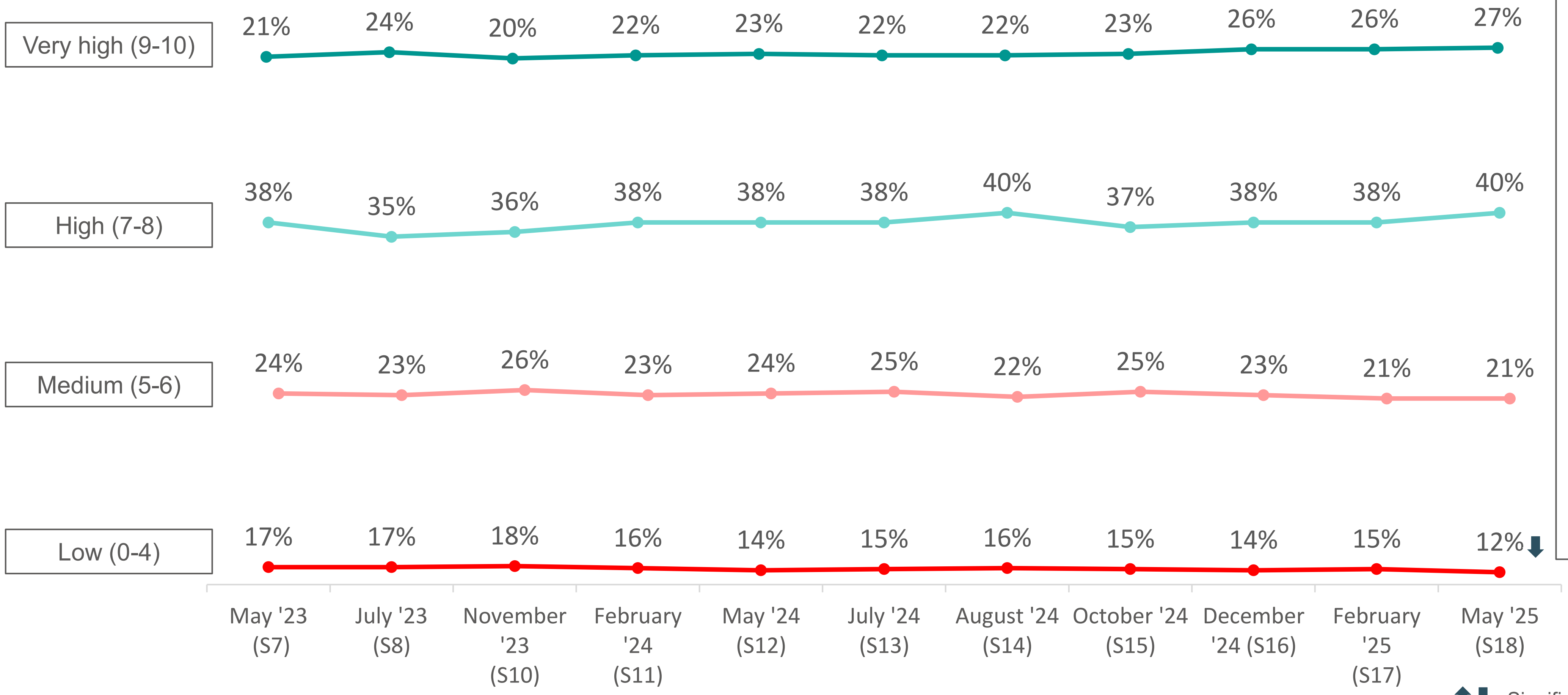
- Those out of work for more than 6 months (28%)
- Those with a household income up to £10,399 (23%)
- Those studying at school or college (21%)

* Subgroup analysis uses merged data from S16-18

Q10. Overall, to what extent do you feel that the things you do in your life are worthwhile, on a scale of 0 to 10, where 0 is "not at all" and 10 is "completely"? / Unweighted base: (All respondents) S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517; S16, 1523; S17, 1515; S18 (May '25), 2298. Thresholds are applied to responses to convert the 11-point scale into the categories shown. Unweighted base: S16-18 = 5336 (All respondents).

Over one-quarter (27%) of respondents say they feel a very high level of happiness – now the highest recorded figure so far. Also positively, levels of low happiness have significantly decreased since last wave (12% cf. 15%). However, those with a disability and those who are aged 18-24 are significantly more likely to report not feeling at all happy yesterday (score 0-4).

How happy did you feel yesterday?



% who did not feel at all happy yesterday, compared to the GM average (12%)*:

Demographics:

- Those who have a disability (29%), including those with mental ill health (41%), a learning disability (29%), mobility disability (27%) or sensory disability (25%)
- Those aged 18-24 (22%)

Individual and/or family circumstance:

- Those who have a condition which reduces ability to do activities a lot (32%)
- Those with a household income of up to £10,399 (25%)
- Those out of work 6 months or less (25%)

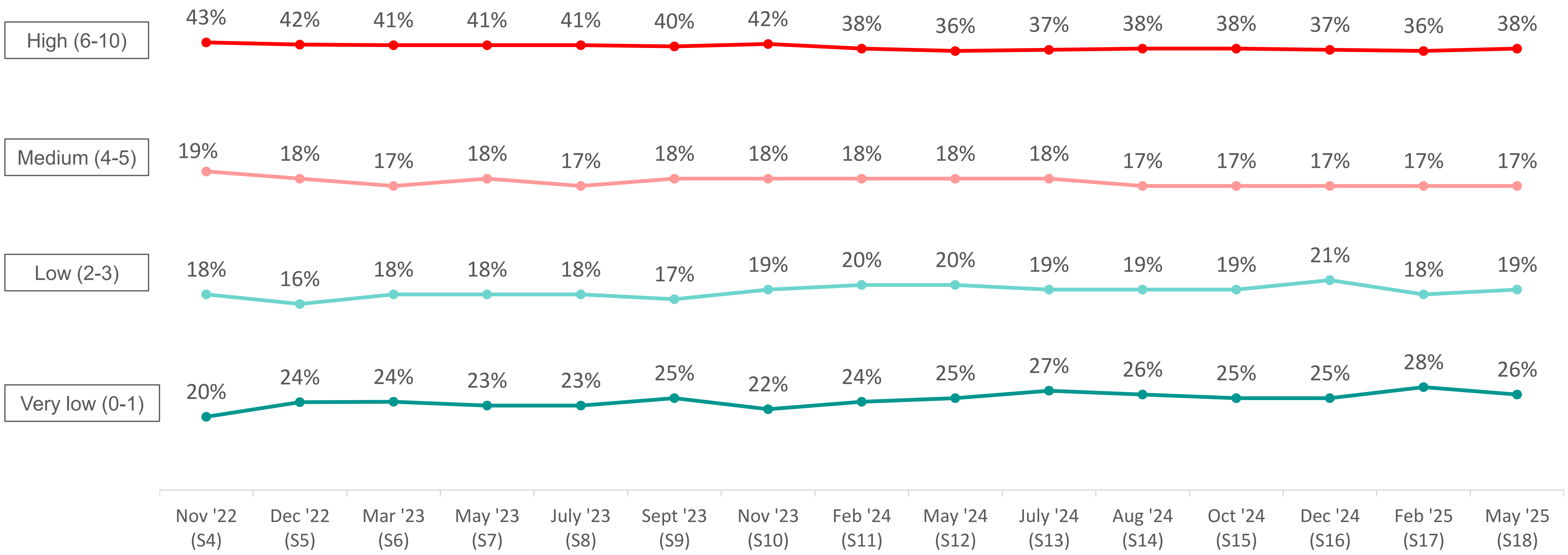
* Subgroup analysis uses merged data from S16-18

⬆⬇ Significantly higher/lower than February 2025

Q11. Overall, how happy did you feel yesterday, on a scale of 0 to 10, where 0 is “not at all” and 10 is “completely”? S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517; S16, 1523; S17, 1515; S18 (May ‘25), 2298. Thresholds are applied to responses to convert the 11-point scale into the categories shown.
Unweighted base: Greater Manchester Residents Survey 15-17: 4555 (All respondents)

Chiming with trends seen in respect of life satisfaction, levels of very low anxiety have remained high, just a little below the all-time high levels recorded in February 2025. Likewise, all other levels of anxiety have also remained steady, with no significant changes since February (though this does mean that 38% continue to report high levels of anxiety)

How anxious did you feel yesterday?



A2. Where 0 is “not at all” and 10 is “completely”…
Unweighted base: Greater Manchester Residents Survey 4, 1636; Survey 5: 1470, Survey 6: 1767, Survey 7: 1488, Survey 8: 1612, Survey 9: 1560, Survey 10: 1546, Survey 11: 1460, Survey 12: 1551, Survey 13: 1540, Survey 14: 1482, Survey 15: 1517; Survey 16: 1523; Survey 17: 1515; Survey 18 (May ‘25): 2298.

When looking at sub-groups, respondents with a disability, along with respondents who disagree that people in their area look out for each other and get on well, are significantly more likely to have low levels of life satisfaction and high levels of anxiety.

% with higher levels of 'low' life satisfaction compared to GM average (12%)*:

Demographics:

- Those with a disability (27%), including those with mental ill health (37%),a learning disability (29%) a mobility disability (27%), a sensory disability (25%), or other disability (26%)
- Those who have a mixed ethnicity (25%)
- Those who are not heterosexual (20%), particularly those bisexual (23%)
- *Those age 16-24 (16%) or aged 45-54 (16%)*

Individual and/or family circumstance:

- Those not in work due to ill health or disability (44%), or have been out of work for more than 6 months (25%)
- Those who have been treated unfairly by society (32%)
- *Those who disagree that people in their area from different backgrounds get on well together (26%)*
- Those with a household income up to £10,399 (23%)
- *Renters (Local authority/council) (21%)*
- *Those living with a friend or family (19%)*

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

Demographics:

- Those with a disability (52%) including those with mental ill health (66%), a learning disability (58%), *sensory disability (52%), or a mobility disability (46%)*
- *Those with a first language of Urdu (54%)*
- Those who are bisexual (53%)
- *Gay women or lesbian (51%)*
- Those aged 18-24 (45%) or females under 45 (45%)

Individual and/or family circumstance:

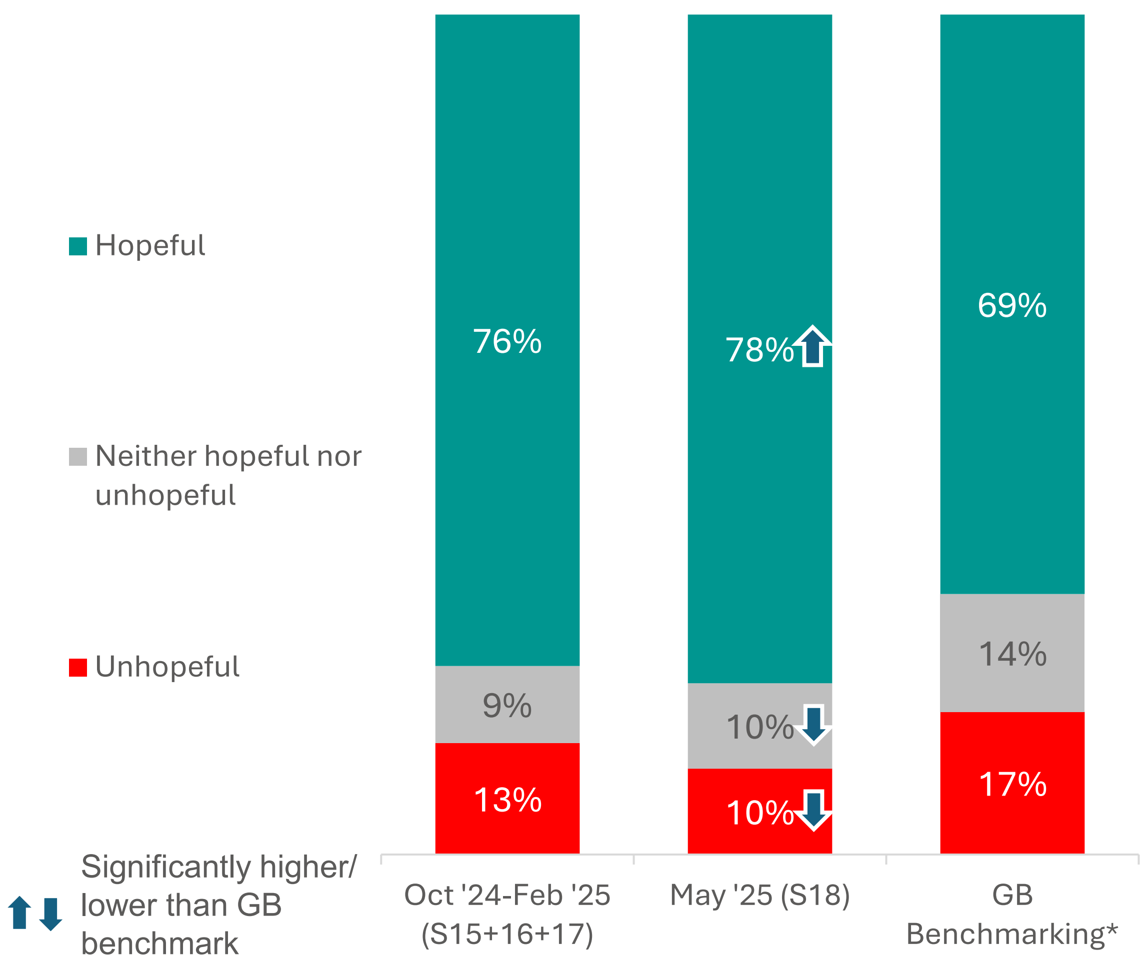
- *Those discriminated almost all/ a lot of the time for their sexual orientation (68%)*
- Those not in work due to ill health or disability (58%)
- Those who feel lonely at least some of the time (57%)
- *Those with a condition that reduces their ability to do activities a lot (56%)*
- Those with a household income up to £10,399 (49%)
- *Those who have completed an apprenticeship (47%)*
- *Those who disagree that people in their local area look out for each other (45%)*

* Subgroup analysis uses merged data from S16-S18 combined, with a sample size of 5,336 across the three waves. *Italics denotes greater prominence / newly featuring in latest analysis compared to previous wave*

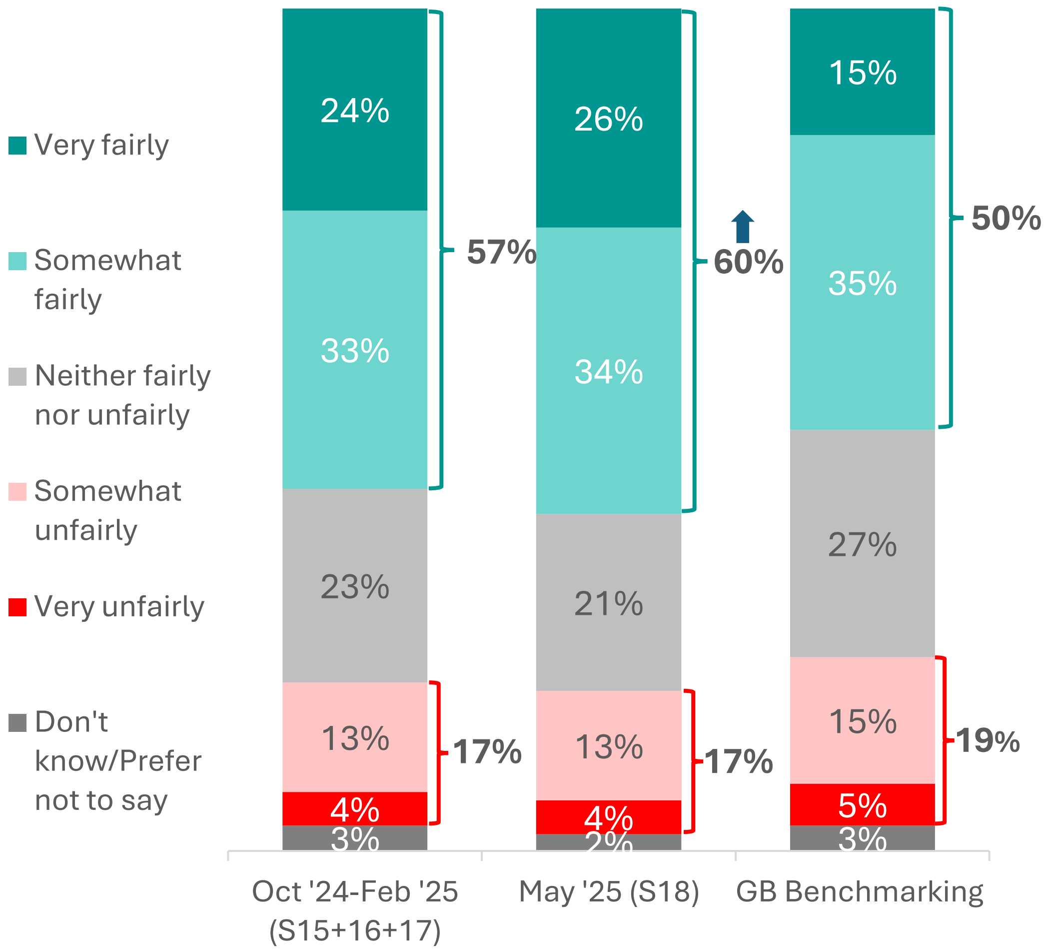
A1. Where 0 is "not at all" and 10 is "completely"… A2. Where 0 is "not at all" and 10 is "completely"… Unweighted base: Greater Manchester Residents Surveys 16-18, 5336

Those in Greater Manchester continue to be more hopeful about the future than elsewhere (78% in GM vs. 69% for GB), as well as feeling treated fairly by society (60% feel fairly treated in GM vs. 50% across GB). Also positively, GM figures in relation to fairness have seen a short-term significant increase.

How hopeful do you feel about your future?



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



A3. Overall, how hopeful do you feel about your future, where 0 is 'not at all hopeful' and 10 is 'completely hopeful'? A4. How fairly or unfairly do you feel you are treated by society?
Base: S18 (May '25), 2298. *Figure is 67% in national figures, but rebased here for reporting purposes. GB benchmarking taken from UK measures of national wellbeing (fieldwork period 4 Dec 2024 to 5 Jan 2025), with no updates to these national figures since the last publication of this report.

Those who have a disability are significantly more likely to feel low hopefulness and that society treats them unfairly. Similarly, respondents who have a lower household income and those not in a full-time job are significantly more likely to feel low hopefulness and that society treats them unfairly.

% with higher levels of 'low' hopefulness compared to GM average (10%)*:

Demographics:

- Those with a disability (27%) including mental ill health (36%), a sensory disability (27%), a mobility disability (27%), *or a learning disability (22%)*
- *Those who are bisexual (18%)*
- Those age 45-54 (15%)
- Those with no religion (14%)

Individual and/or family circumstance:

- Those not in work due to ill health or disability (38%)
- *Those treated unfairly by society (31%)*
- *Those who are dissatisfied with their local area (33%)*
- Those who have been out of work for 6 months or more (27%)
- *Those who disagree that people from different backgrounds get on well together in their local area (25%)*
- Those who are lonely at least some of the time (23%)
- Those with a household income of less than £10,399 (23%)
- *Those who are 18-64 experiencing one aspect of material deprivation (17%)*
- *Those not in employment (15%)*

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

Demographics:

- Those with a disability (29%), including those with mental ill health (35%), a learning disability (34%), a sensory disability (31%), or a mobility disability (28%)
- Gay men (29%)
- *Those not heterosexual (28%)*
- Those from any other white background (29%)
- *Those with a mixed ethnicity (24%)*

Individual and/or family circumstance:

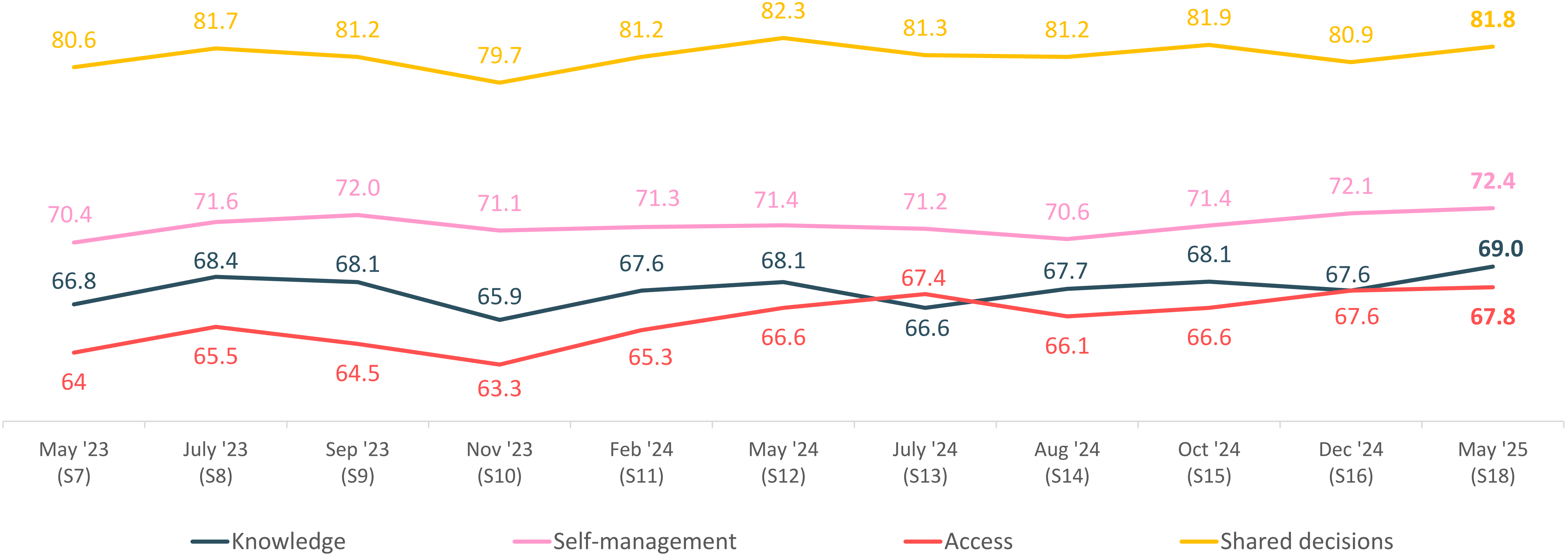
- Those with very low levels of hopefulness (53%), low levels of life satisfaction (43%) and low levels of happiness (38%)
- Those not in work due to ill health or disability (39%)
- Those who disagree that people from different backgrounds get on well together in their local area (31%)
- *Those with a household income of less than £10,399 (27%)*
- *Renters (22%)*
- Those in a part time job (21%)

* Subgroup analysis uses merged data from S16-S18 combined, with a sample size of 5,336 across the three waves. *Italics denotes greater prominence / newly featuring in latest analysis compared to previous wave*

A3. Overall, how hopeful do you feel about your future, where 0 is 'not at all hopeful' and 10 is 'completely hopeful'? A4. How fairly or unfairly do you feel you are treated by society?
Unweighted base: Greater Manchester Residents Surveys 16-18, 5336

May 2025 shows some positive movements within "health confidence", across all dimensions. In particular, there are notable short-term increases in knowledge and shared decisions. The overall Health Confidence Score has consequently increased, rising by 0.6 from 72.1 to 72.7. The long-term outlook is also positive

Dimensions of Greater Manchester health confidence score



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

S14. To what extent do you agree or disagree with the following statements?
Unweighted base: All respondents; S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1,551; S13, 1540; S14, 1482; S15, 1517; S16, 1523; S18, 2298

This wave we have revisited insights in relation to disabled respondents. These respondents have a lower-than-average level of health confidence compared to respondents as a whole – reported at 62.8 out of 100, lower than the overall GM score of 72.7

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

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

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

Access	Knowledge	Self-management	Shared decision
56.4	62.1	58.1	74.7
-11.4 (vs. GM)	-6.9 (vs. GM)	-14.3 (vs. GM)	-7.1 (vs. GM)
'I can get the right help if I need it'	'I know enough about my health'	'I can look after my health'	'I am involved in decisions about me'

Health confidence score for disabled respondents (out of 100)

62.8

This is

-9.9

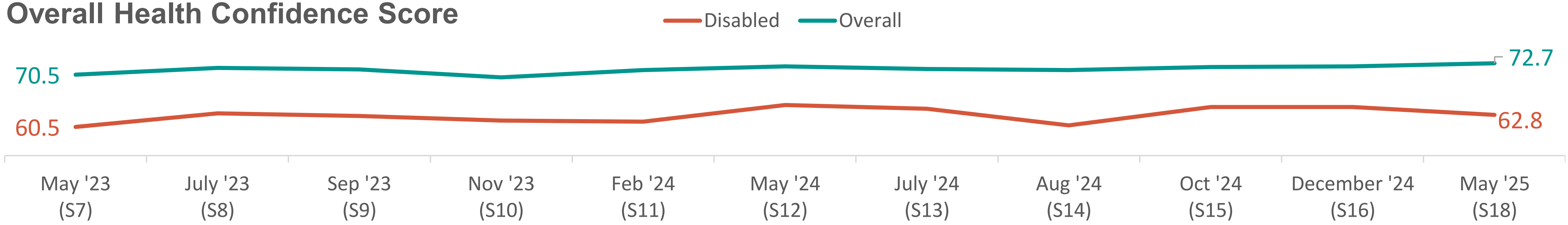
points lower than in the overall GM score

Wave	Gap in HCS between GM average and disabled respondents
May '23 (W7)	-9.9
Jul '23 (W8)	-8.7
Sept '23 (W9)	-8.9
Dec '23 (W10)	-8.3
Feb '24 (W11)	-9.9
Jun '24 (W12)	-7.4
Jul '24 (W13)	-7.6
Aug '24 (W14)	-10.6
Oct '24 (W15)	-7.7
Dec '24 (W16)	-7.8
May '25 (W18)	-9.9

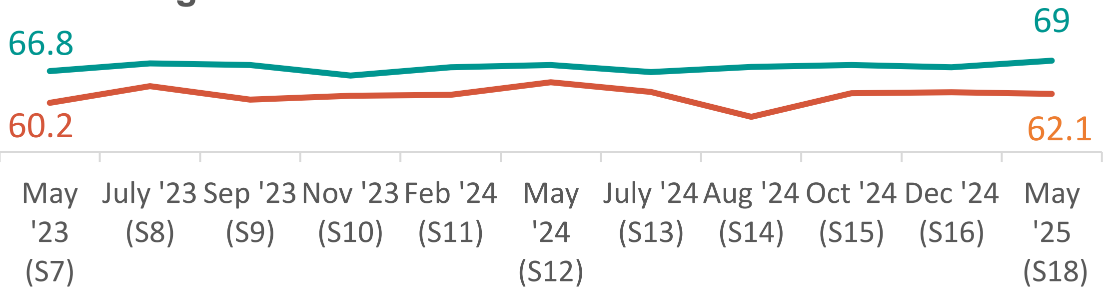
S14. To what extent do you agree or disagree with the following statements?
Unweighted base: Disabled respondents, 626 (Valid responses)

The **overall health confidence** score continues to remain lower for disabled respondents than for the general population, with gaps widening to levels similar to those recorded in August 2024. The widest gap continues to be with self-management, although access for disabled respondents did record a notable drop from Dec 2024 (-11.4)

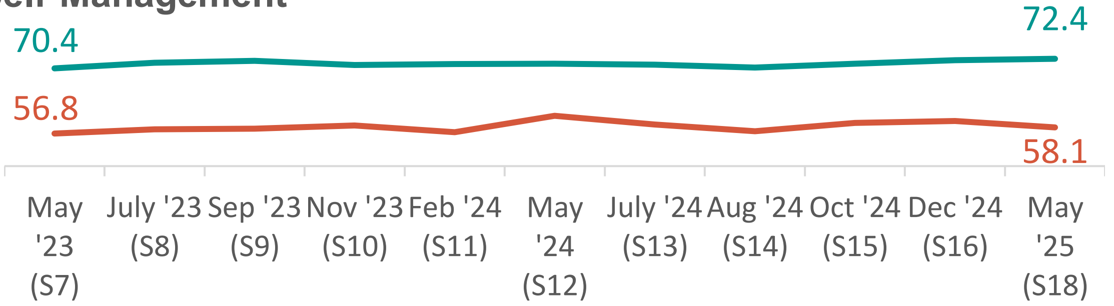
Overall Health Confidence Score



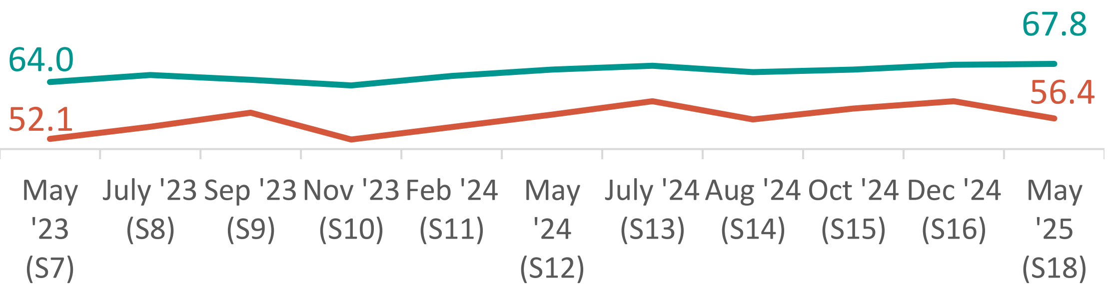
Knowledge



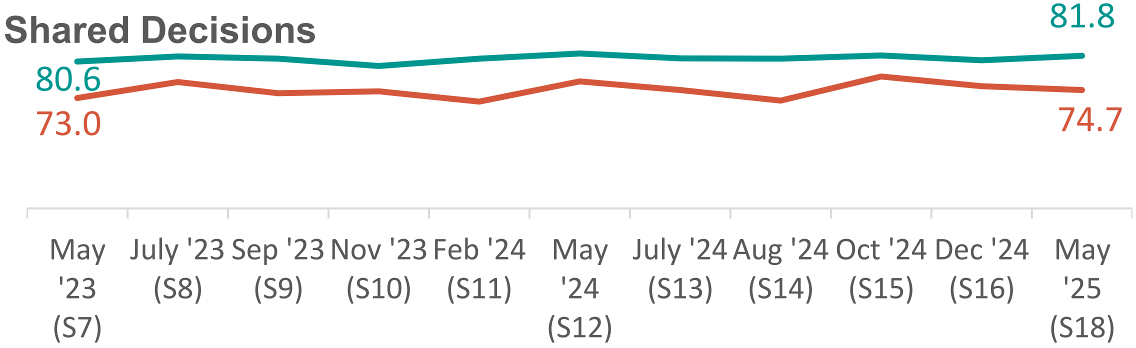
Self-Management



Access



Shared Decisions



S14. To what extent do you agree or disagree with the following statements?
Unweighted base: Survey 18, 2298 (All responses); 626 (Disabled respondents)

Your Local Area

Your local area – context

The survey continues to explore residents' experiences of their local area, along with their sense of community, local pride and belonging. Several questions were originally formulated to explore pride in place and life chances (with local growth funds such as the UK Shared Prosperity Fund in mind). Given that the questions place a focus on community relationships and dynamics, they are also increasingly going to be used to monitor and evaluate progress against Greater Manchester's Live Well ambitions, as well as underpinning some aspects of the new Greater Manchester Strategy (GMS).

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 16, 17 and 18.

Benchmarks, where included, reflect most recent published national data from two sources:

1. The DCMS' Community Life Survey (covering October 2023 – March 2024) – this source references benchmarking figures for England only.

2. UK Measures of National Well-being (covering 2 – 27 April 2025) – this source references benchmarking figures for Great Britain.

Please note the DCMS' Community Life Survey is a household online and paper self-completion study. Differences in methodology between the two surveys mean that there will be some modal impacts on answers provided by respondents. As a result, comparisons between them are meant to be illustrative.

England benchmarking figures taken from the DCMS Community Life Survey. This report was published on 4 December 2024 and relates to fieldwork between October 2023 and March 2024. GB benchmarking figures taken from the UK Measures of National Well-being - Office for National Statistics (ons.gov.uk). This report was published on 16 May 2025 and relates to fieldwork between 2 to 27 April 2025.

Your local area – key findings

NEIGHBOURHOOD AND COMMUNITY

- Following a dip in agreement about statements regarding neighbourhood relations in February 2025, there has been an uptick in agreement in May 2025. Most positively, there has been a statistically significant increase of 4pp in those who agree that they are proud of their local area (from 70% to 74%).
    - Although 82% agree their local area is one where people from different backgrounds get on well together, some respondents do not feel this way – the most commonly-reported reasons for this are groups keeping to themselves, anti-social behaviour, and prejudice/racism in the local area
- Around three-quarters of respondents agree that their local area celebrates diversity and promotes equality (72%) and that people from different countries make a valuable contribution to Greater Manchester (73%).
    - Latest data suggest that those with high life satisfaction (86%) and African respondents (84%) are more likely to agree that their local area celebrates diversity. Black respondents (93%) and parents of younger children aged 0-4 (88%), meanwhile, appear more likely to agree that people from different backgrounds make a valuable contribution to GM.

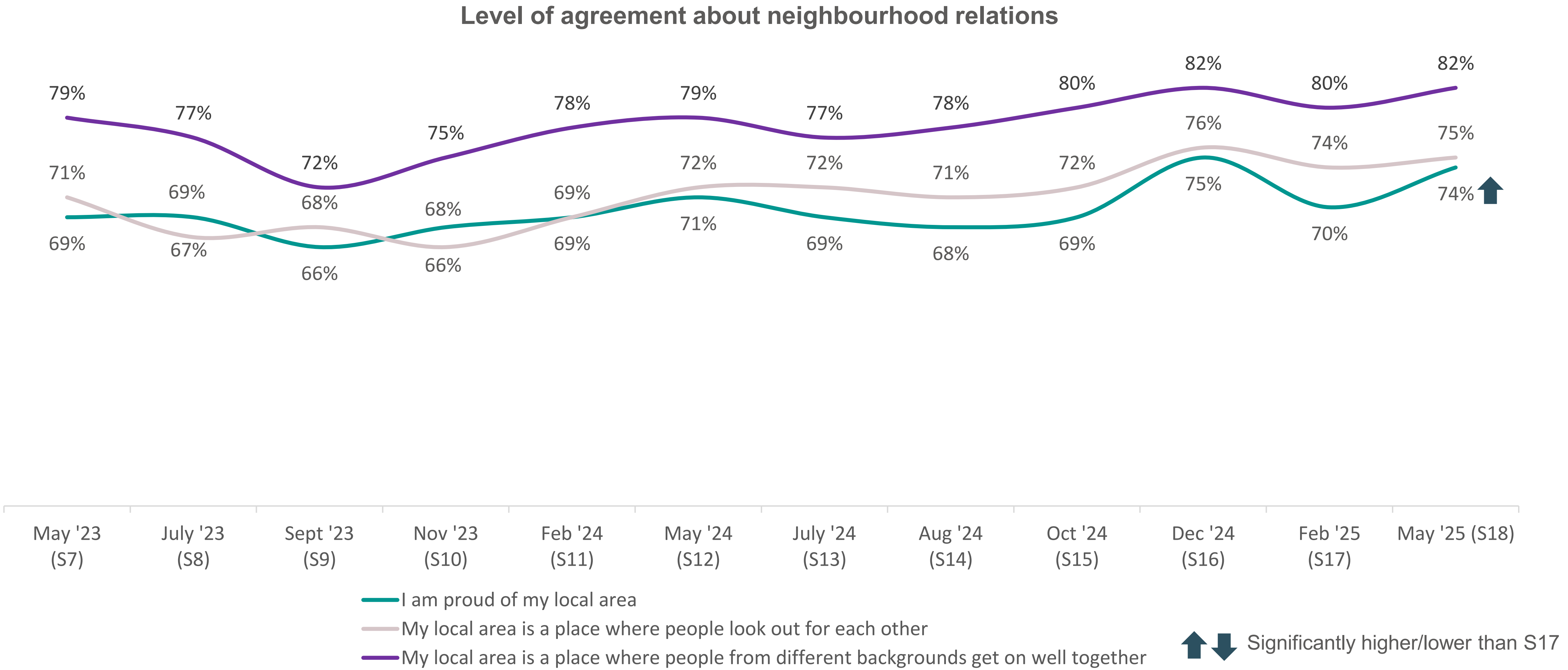
LONELINESS

- The survey continues to track data on how often respondents feel lonely. 44% of respondents say they hardly ever or never feel lonely, while 29% say they feel lonely at least some of the time. When comparing this to wider benchmarking data, the rest of GB are significantly more likely to say they feel lonely never or hardly ever (48%) and fewer say they feel lonely at least some of the time (24%).
    - As recorded in previous waves, loneliness remains high amongst those with a disability (42% lonely at least some of the time), younger respondents aged 18-24 (45%) and those with a physical or mental condition / illness that reduces their ability to carry out day-to-day activities (48%).
- Although loneliness measures indicate a continuing GM challenge, the picture looks somewhat more positive when asking broader questions about support networks available in the community. There has been an increase in GM respondents who agree that if they wanted company or to socialise, there would be someone to call on (83% in May 2025 compared to 79% in February 2025). Though not statistically significant, there has also been an increase in those who agree that if they needed help, there are people who would be there for them (85%).

VOLUNTEERING

- One in three (32%) respondents report that they have volunteered in the last year, which has increased by 2pp compared to February 2025, but is mostly in line with figures recorded in previous waves.
    - Latest analysis suggests that certain ethnic groups from racially minoritised communities are more likely to have volunteered, such as Black or Black British or African respondents. Propensity to volunteer is also associated in most recent data with higher income earners and those who have completed an apprenticeship.

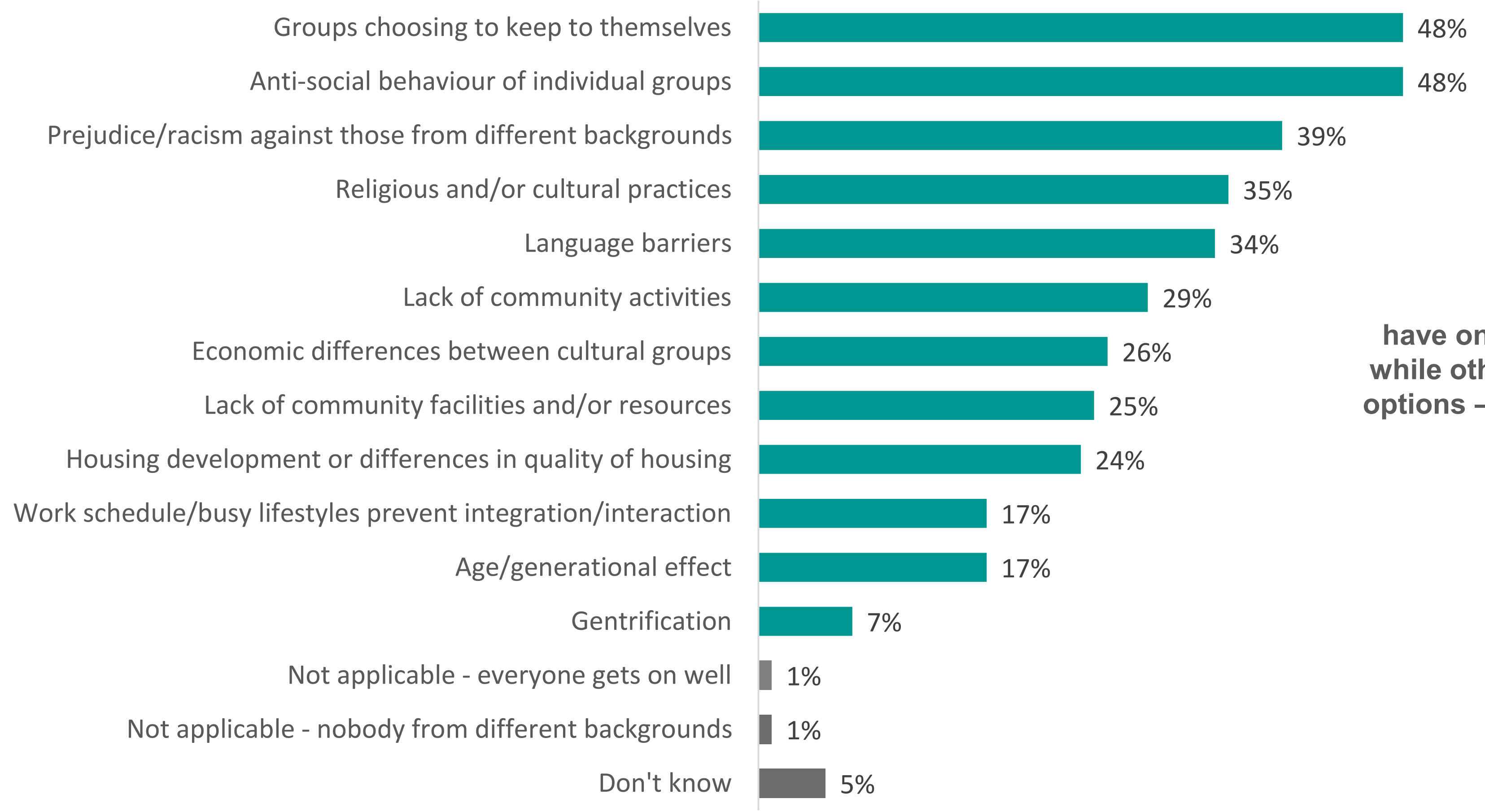
Agreement with statements about neighbourhood relations have increased slightly following a dip in Feb 2025, bringing back figures in line with Dec 2024. There has been a significant 4pp increase in agreement of being proud of their local area (from 70% to 74%).



LA6. To what extent do you agree or disagree with the following statements about your local area?) Only valid responses shown
Unweighted base: S7, 1488; S8, 1612; S9, 1560; S10, 1546; S11, 1460; S12, 1551; S13, 1540; S14, 1482; S15, 1517; S16, 1523; S17, 1515, S18, 2298 (All respondents).

Around 2 in 5 said people from different backgrounds do not get on well together in their local area. The most commonly-reported reasons for this are groups keeping to themselves, anti-social behaviour, and prejudice/racism

You said you disagree that your local area is a place where people from different backgrounds get on well together. Are any of the following reasons why people don't get on well together in your local area?

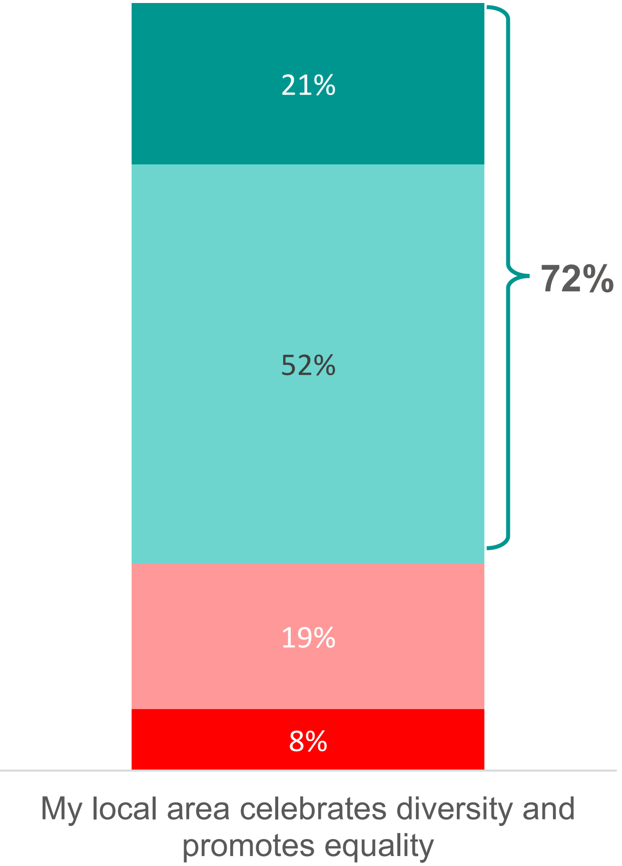


8%
have only chosen one code, while others selected multiple options – i.e. most often this is multi-faceted

LA6b. You said you disagree that your local area is a place where people from different backgrounds get on well together. Are any of the following reasons why people don't get on well together in your local area? Base: 817 (All respondents, S16+17+S18)

7 in 10 respondents (72%) agree their local area **celebrates diversity and promotes equality**, with 3 in 4 (72%) agreeing that **people who come from other countries make a valuable contribution to Greater Manchester**. High earners and parents of young children are more likely to agree.

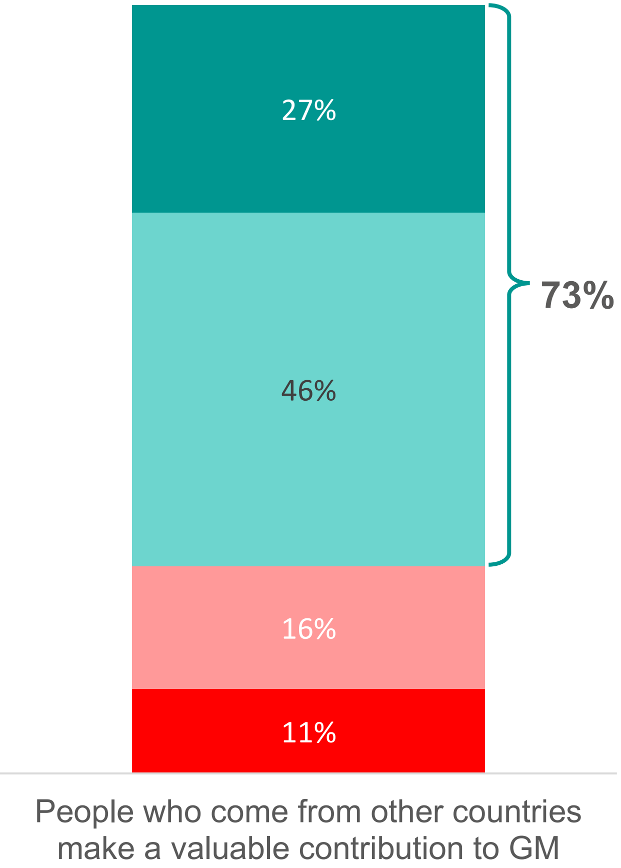
My local area celebrates diversity and promotes equality



% who are significantly more likely to agree their local area celebrates diversity and promotes equality compared to GM average (72%)*
• Those with high life satisfaction (86%) • African respondents (84%) • Those earning £78,000 and over (84%) • Those with very high levels of happiness (84%) • Self-employed respondents (82%) • Parents of children under 5yos (80%)

% who are significantly more likely to agree people who come from other countries make a valuable contribution to GM (73%)*
• Black respondents (93%) • Parents of children aged 0-4 years in early years educations (85%) • Those whose first language is not English (84%) • Those earning £78,000 and over (82%)

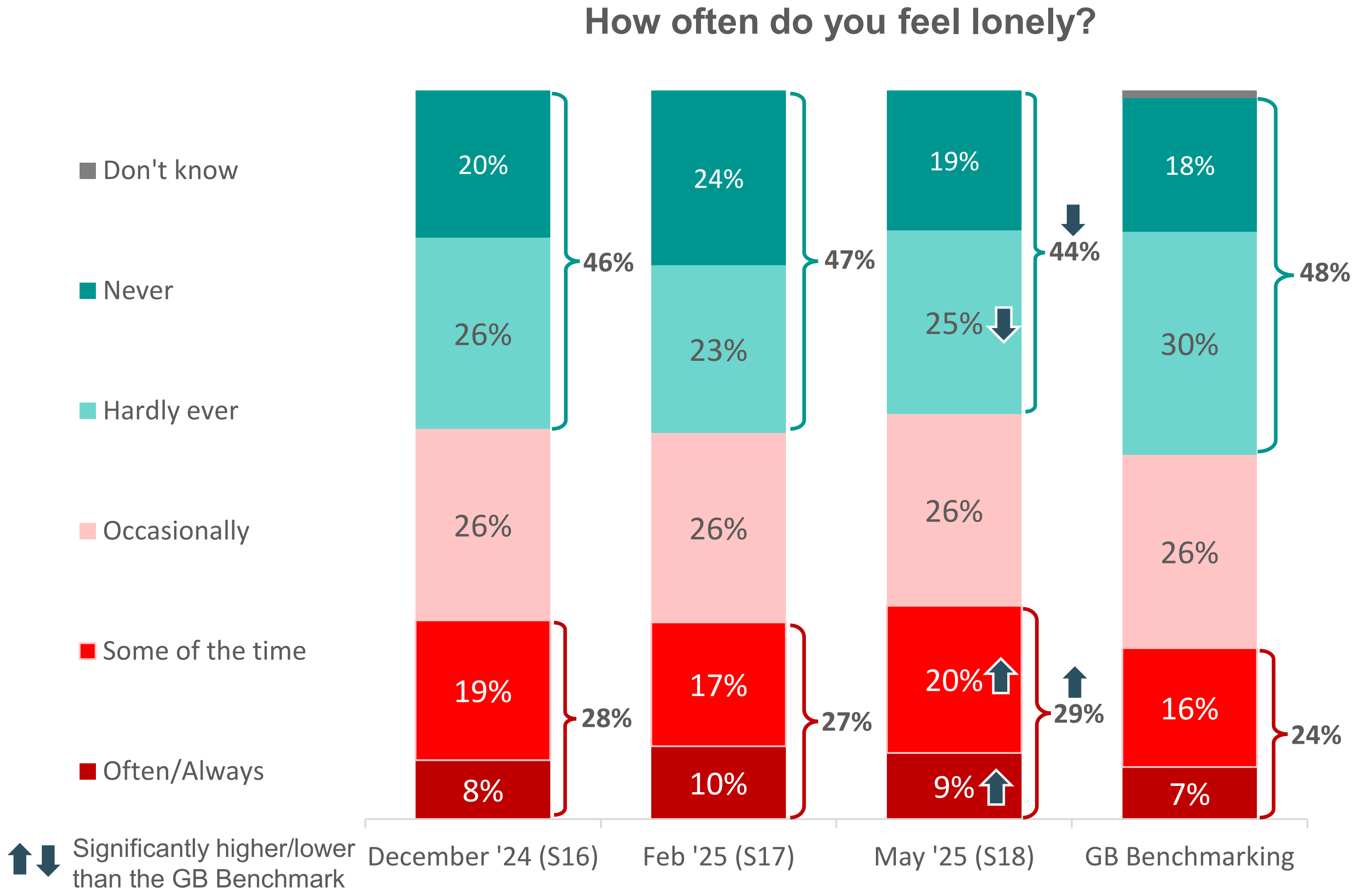
People who come from other countries make a valuable contribution to Greater Manchester



■ Definitely agree ■ Tend to agree ■ Tend to disagree ■ Definitely disagree

LA6. To what extent do you agree or disagree with the following statements...?
Base: 4009 - 4556 (All valid respondents, S16+17+18)

The proportion of respondents who feel lonely at least some of the time has increased compared to Feb 2025 (from 27% to 29%), with this increase driven by those who feel lonely "some of the time". Loneliness figures in GM remain significantly higher than the GB average of 24%...



% more likely to feel lonely at least some of the time compared to surveys 16-18 GM average (28%):

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

Demographics:

- Those with a disability (42%), including those with mental ill health (58%), a learning disability (52%), a sensory disability (41%) and a mobility disability (34%)
- Those aged 18-24 (45%)
- Those who are bisexual (49%), *lesbian (40%) or gay man (38%)*
- *Pakistani respondents (45%)*
- *Those whose first language is Urdu (48%)*
- *Muslim respondents (42%)*

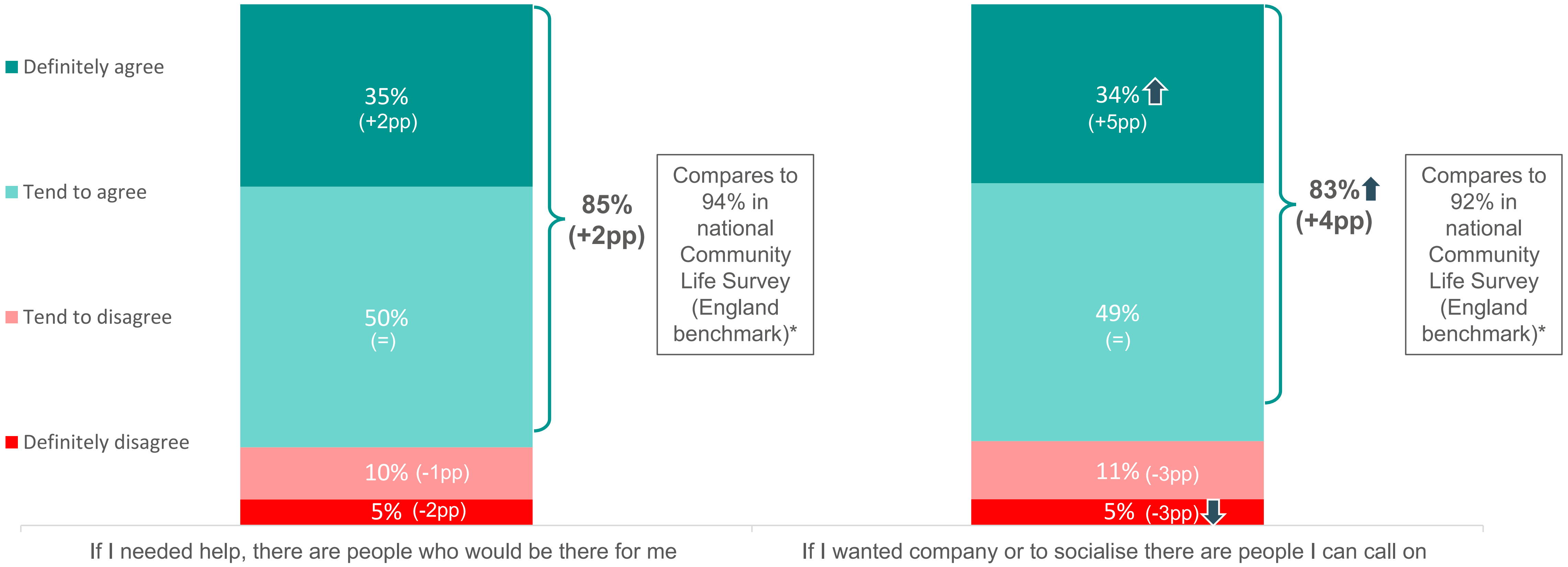
Individual and/or family circumstance:

- Those who have a physical/mental condition which reduces their ability to do activities a lot (48%)
- Those not in work due to ill health or disability (51%), or those studying at university (46%)
- Those who are living with a friend or family (45%)

A5. How often do you feel lonely? Base: Dec'24 (S16) 1523, Feb'25 (S17) 1515. GB benchmarking taken from UK measures of wellbeing (fieldwork period 2 to 27 April 2025).

.. More positively, there has been a significant increase in agreement that if they wanted company or to socialise, there are people they can call on in their local area (from 79% to 83%), with this driven by an increase in those who "definitely agree". There has also been a slight increase in those who agree that if they needed help, there are people who would be there for them (from 83% to 85%).

To what extent do you agree or disagree…?



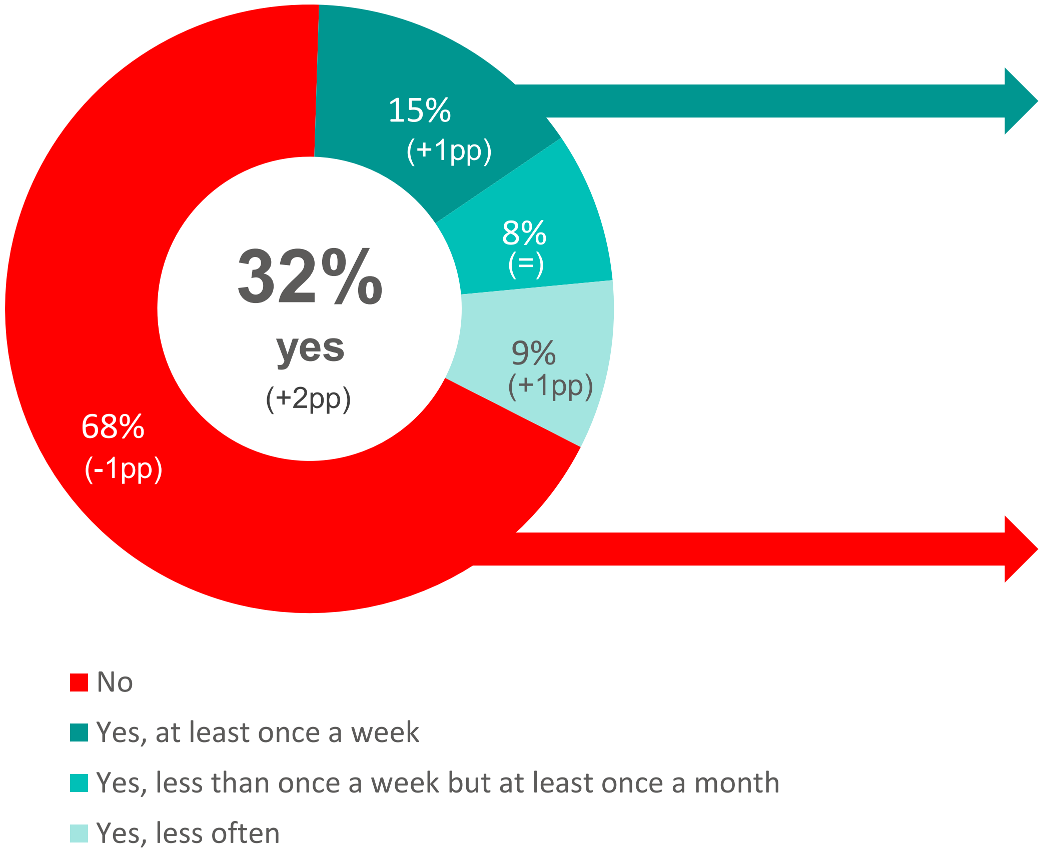
Figures in brackets show change since February 2025 (S17)

Significantly higher/lower than Feb '25

LA6. To what extent do you agree or disagree with the following statements about your local area? Unweighted base: Survey 16: 1523, Survey 17: 1515, Survey 18: 2298 (All responses) Only valid responses shown. *England benchmarking taken from DCMS Community Life Survey (fieldwork October 2023-March 2024) – comparisons with benchmarking data should be treated with caution due to fieldwork taking place some time before.

3 in 10 (32%) have volunteered in the past year, increasing slightly compared to Feb 2025 and bringing back figures in line with Dec 2024. Those more likely to volunteer include African respondents (as seen in previous waves), along with those who have completed an apprenticeship and previous carers.

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



The following groups are more likely to volunteer, compared to the Greater Manchester average (32%)*:
59% African respondents
***59%** Completed an apprenticeship*
57% Those with previous caring responsibilities
56% Jewish respondents
56% Those with a household income over £78k
55% Those with children in early years education
***50%** Those who identify as trans*
50% Those with a learning disability

The following groups are less likely to volunteer, compared to the Greater Manchester average (where 68% have not volunteered)*:
86% Those not in work due to ill health or disability
84% Homemakers
***83%** Eastern European respondents*
***81%** Those out of work for 6 months or more*
***80%** Those aged between 65-74*
***77%** Those with low life satisfaction*
***76%** Those with no religion*

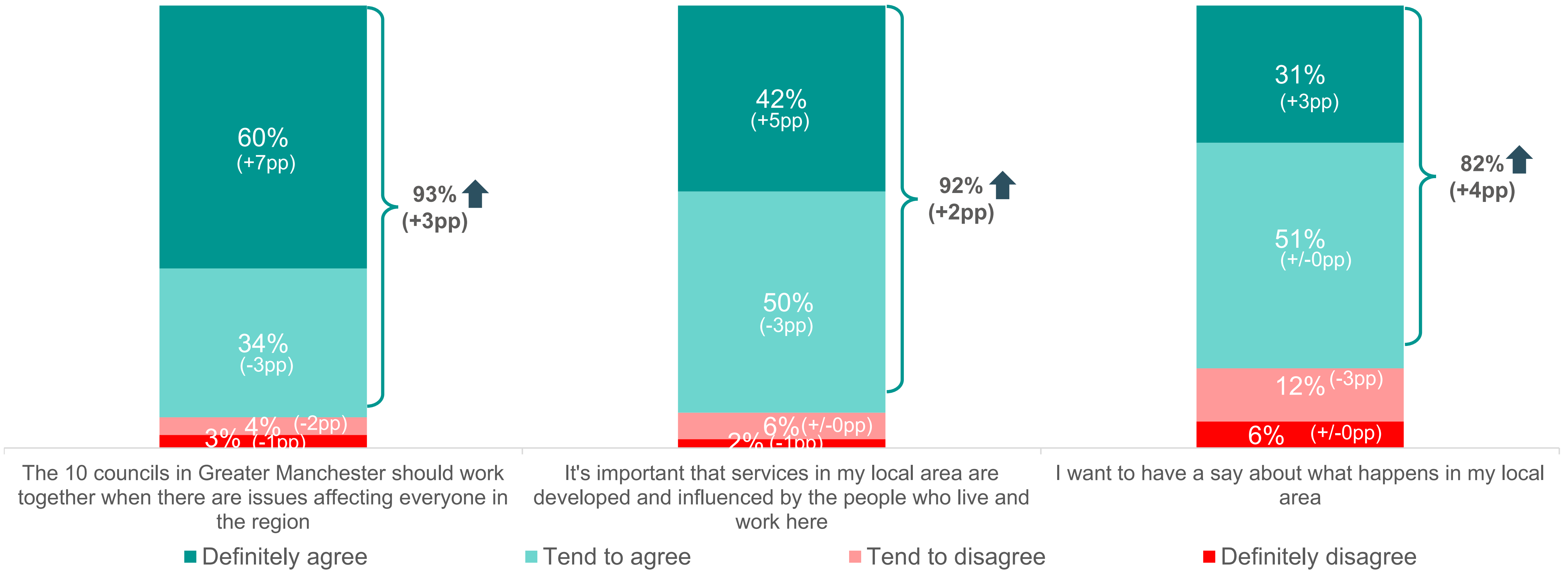
*subgroup analysis using data from S16-18 (Dec'24-May'25)
Italics denotes newly featuring in latest analysis compared to previous wave

Figures in brackets show change since February 2025 (S17)

S12. Thinking of the last 12 months, have you taken part in any volunteering for any clubs, groups or organisations? Base: May'25 (S18), 2298

GM respondents continue to agree that the **10 councils should work together** (93%), that **services in their local area should be developed and influenced by people who live and work there** (92%), and they **want to have a say about what happens in their local area** (82%). Proportions feeling this way have all significantly increased in the short term since February 2025

To what extent do you agree or disagree…?



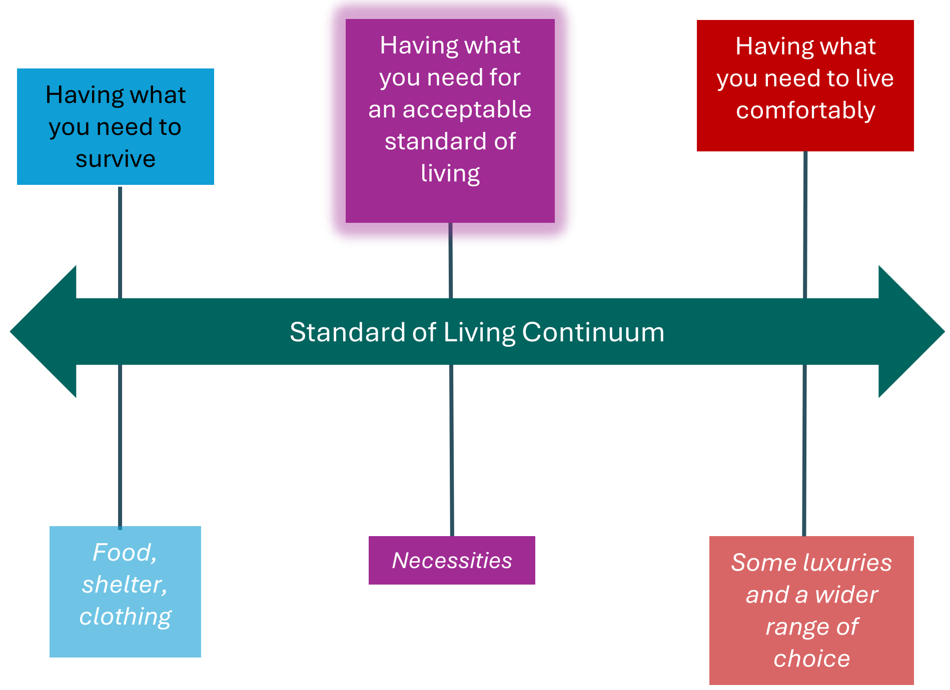
Figures in brackets show change since February 2025 (S17)

Significantly higher/lower than S17

LA6. To what extent do you agree or disagree with the following statements about your local area?
Unweighted base: Survey 15, 1517; Survey 16, 1523; Survey 17, 1515; Survey 18, 2298 (All responses) Only valid responses shown

Material Deprivation

Material deprivation– context and approach (1 of 2)



Adapted from Review of UK Material Deprivation Measures, March 2024

New for this wave is the inclusion of new content on material deprivation.

Material deprivation is a poverty measure focused on everyday experience, looking at whether residents are enjoying a minimum acceptable standard of living. As per the visualisation, this is positioned between **destitution** (where people lack basic necessities such as food, shelter, and clothing) and a low but **comfortable standard of living** (with sufficient resources to afford some luxuries).

The data in this section focuses on three groups:

- parents with children aged under 18
- working age adults (aged 18-64)
- pensioners (aged 65+).

Assessing whether respondents in these groups are materially deprived (or not) is calculated using a scoring method used by DWP / national government, which has recently been reviewed and refreshed following a review by experts and academics. Further details are included in the Appendix.

It should be noted that although the Residents' Survey replicates the national approach in the DWP Family Resources Survey as closely as possible, differing survey methods* mean that comparisons between GM and national results should be treated with caution and results seen as indicative only

*The DWP Family Resources Survey uses a primarily face-to-face approach, whereas the majority of Residents' Survey responses are gathered using online methods

Material deprivation– context and approach (2 of 2)

Questions were put to respondents that relate to a range of indicators of material deprivation, covering nine dimensions of everyday living, as follows

1. Financial Security
- Regular money worries at the end of the month
- Regular payments to workplace or private pension
- Able to pay bills without cutting back on essentials
- Able to put money aside for unexpected expenses
- Cover cost of repair or to replace appliances

2. Social and Leisure Activities
- School Trips *(households with children only)*
- Organised weekly activity outside school *(households with children only)*
- Toddler/nursery/playgroup at least weekly *(households with children only)*
- Friends around monthly
- Annual break away from home
- Go out socially at least monthly
- See friends and family at least monthly

3. Things for oneself
- Age suitable toys/games *(households with children only)*
- Small amount of money for oneself

4. Home and Living Conditions
- Enough bedrooms for children 10+ years
- Home in good state of decoration/repair
- Home adequately warm in cold weather
- Home damp free
- Home contents insurance
- Heating/electrics/plumbing in good working order

5. Transport
- Adequate access to reliable transport

6. Clothing
- Appropriate clothes for work/job interview
- Enough clothes to feel comfortable wearing

7. Communication
- Reliable access to internet at home
- Access to computer/tablet

8. Health
- Regular dental appointments

9. Food
- Fresh fruit and/or vegetables every day
- Three meals a day

Material deprivation– key findings

MATERIAL DEPRIVATION AMONG RESPONDENTS WITH CHILDREN UNDER 18

- One quarter (25%) of Greater Manchester respondents with children under the aged of 18 are considered materially deprived.
- Of those who are considered materially deprived (25%), the top scoring indicators within this group are the inability to put money aside for unexpected expenses (90%) and the inability to cover the cost of repairs (85%). Among those living with children who are *not* materially deprived, an inability to put money aside is still a top issue (19%), followed by not having a damp free home (12%).
- Although most parents with children are not considered materially deprived (i.e. 75%), 34% of parents surveyed gave responses that demonstrate between one and three indicators of material deprivation still apply. So, although not qualifying for what we define as materially deprived (score against 4 or more indicators), one third of parents are still lacking in various aspects.

MATERIAL DEPRIVATION AMONG RESPONDENTS OF WORKING AGE (AGED 18-64)

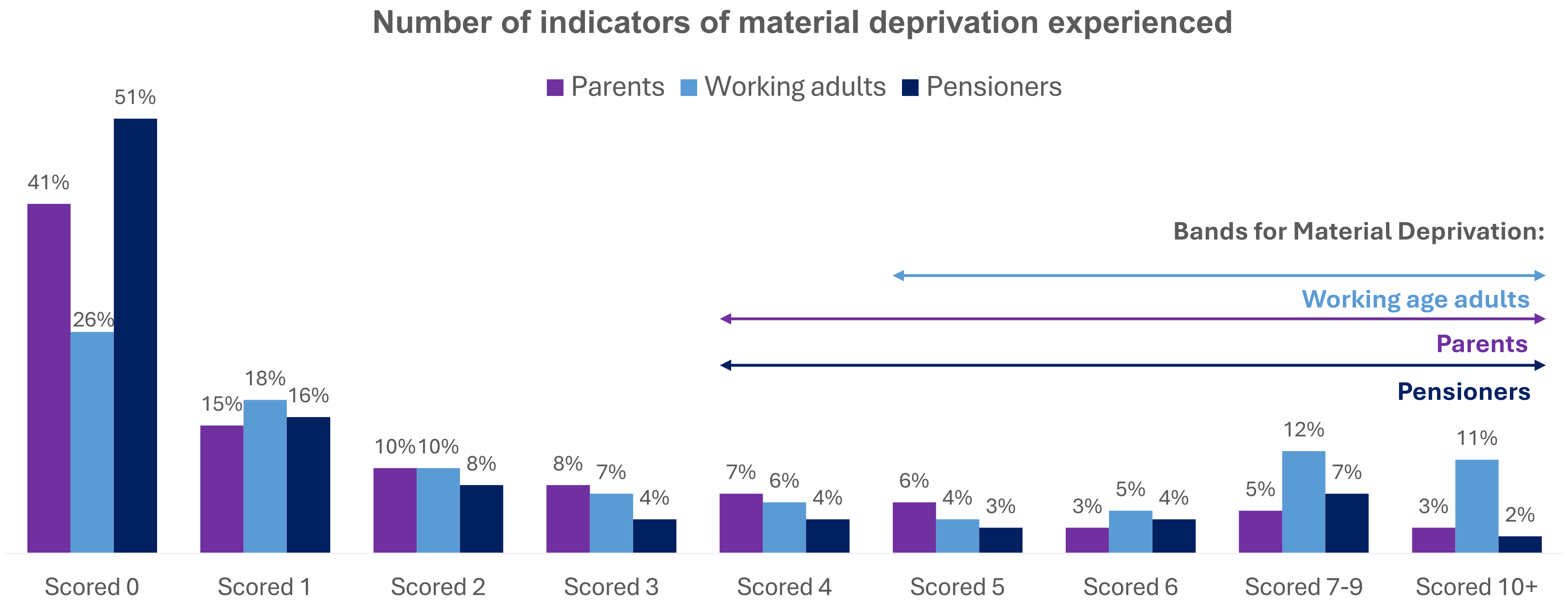
- One third (33%) of working age respondents (aged between 18-64) in Greater Manchester are considered materially deprived.*
- Of these working age adults considered materially deprived (33%), 90% of this group say they have regular money worries at the end of the month and 88% say they are unable to put money aside for unexpected expenses.
- Although two thirds (67%) are considered not materially deprived, there is some commonality with the deprived group, as 3 of the top 5 indicators of deprivation are felt by both. In particular, 33% of this group said that they also experience regular money worries at the end of the month – demonstrating the number of those in Greater Manchester who experience this despite not being considered materially deprived.

MATERIAL DEPRIVATION AMONG PENSIONERS (AGED 65+)

- Compared to parents and working age adults, fewer pensioners aged 65+ in Greater Manchester are considered materially deprived at 1 in 5 (21%).
- The top scoring indicators among pensioners considered materially deprived (21%) are the inability to put money aside for unexpected expenses (81%), followed by having regular money worries at the end of the month (66%).
- Even amongst those not materially deprived (79%), 1 in 10 are still unable to put money aside for unexpected expenses (10%), with a similar proportion unable to keep their home damp free or their home adequately warm in the winter (8% in both instances)

*Nb. The thresholds set for determining material deprivation for working adults is higher than for parents and pensioners – working age adults who scored against 5 or more of the indicators are considered materially deprived, compared to 4 or more measures for parents and pensioners.

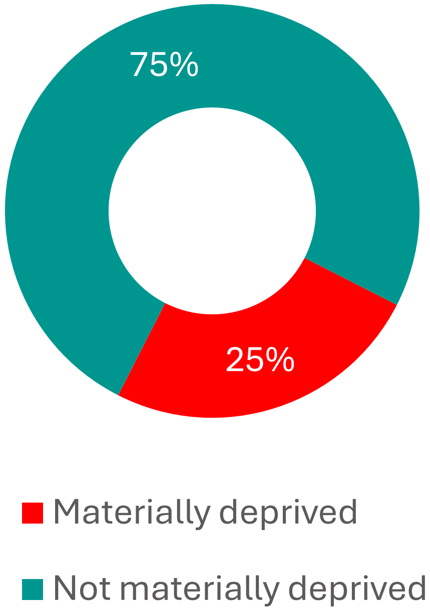
The proportion of respondents who scored against any of the indicators of material deprivation varies depending on household composition. Half (51%) of pensioners and 2 in 5 (41%) parents *did not* report any indicators of material deprivation, compared to just one quarter (26%) of working age adults. This is reflected at the other end of the scale, where almost 1 in 4 working age adults reported experiencing 7 or more indications of material deprivation, compared to around 1 in 10 parents and pensioners



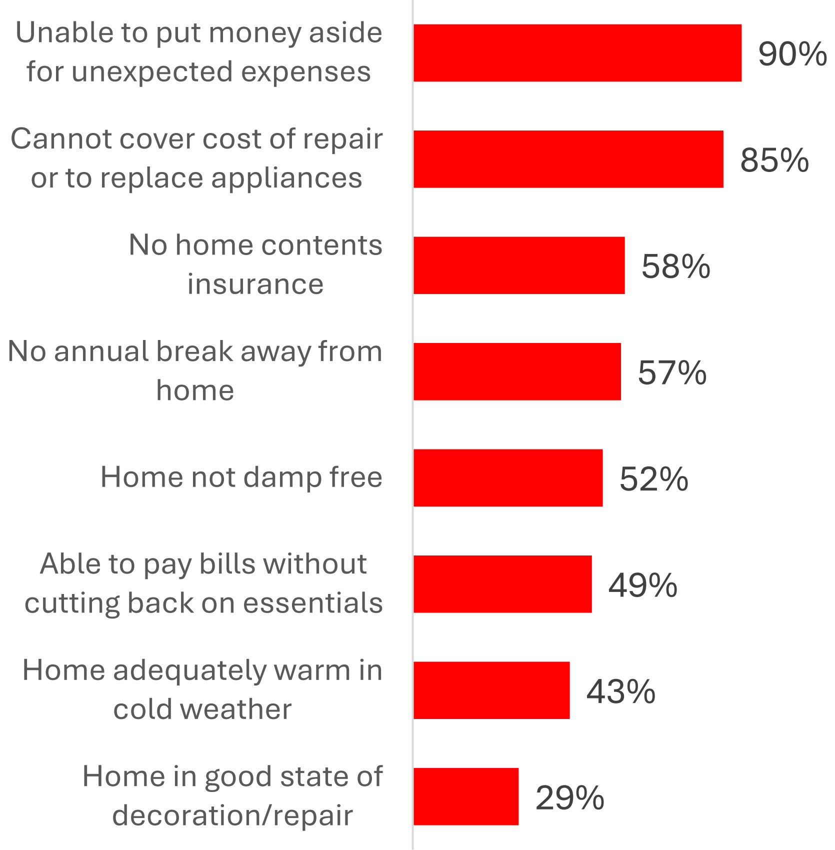
Material Deprivation score calculated based on responses to between 19 and 22 questions. Base: those with children aged 18 or under (861); those aged 18-64 (1753); those aged 65+ (522)

One quarter (25%) of those with children aged 18 or under are considered materially deprived. The top indicators among the materially deprived group are being unable to put money aside for unexpected expenses (90%), being unable to cover cost of repairs (85%) and not having home contents insurance (58%). The top indicators among the not materially deprived group follow a similar pattern.

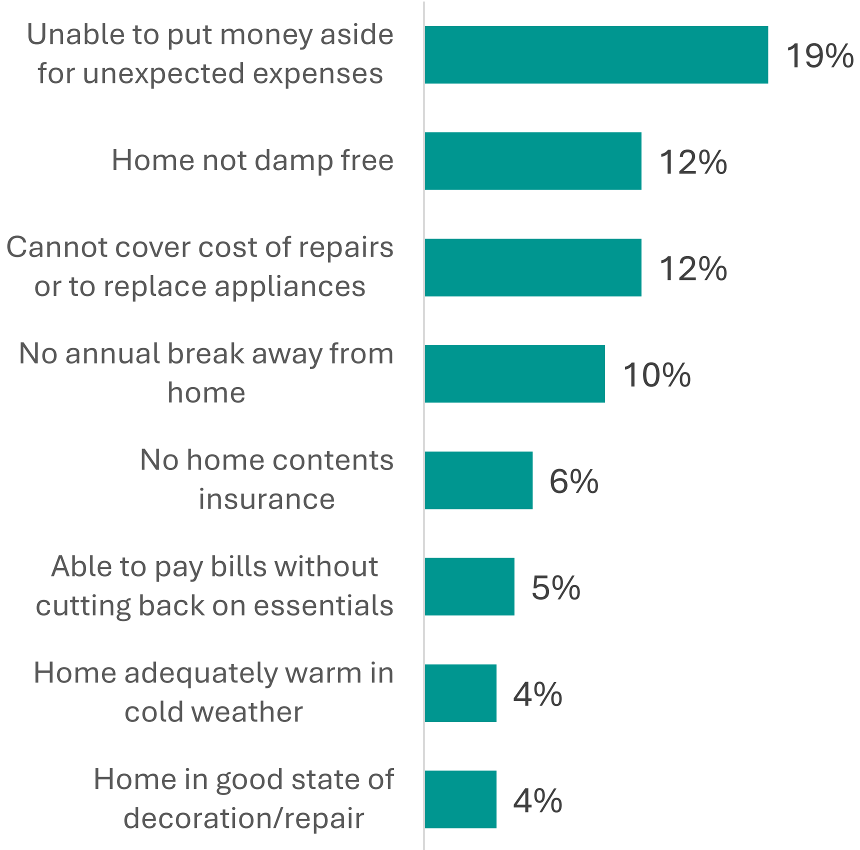
Are respondents with children under 18 materially deprived?



Top scoring indicators of material deprivation (Red 25%)



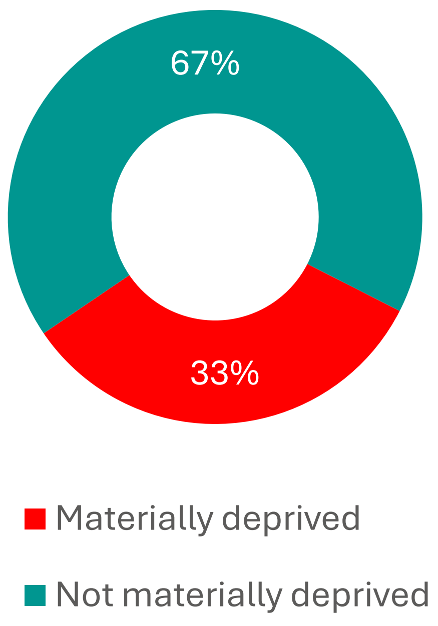
Top scoring indicators of *no* material deprivation (Green 75%)



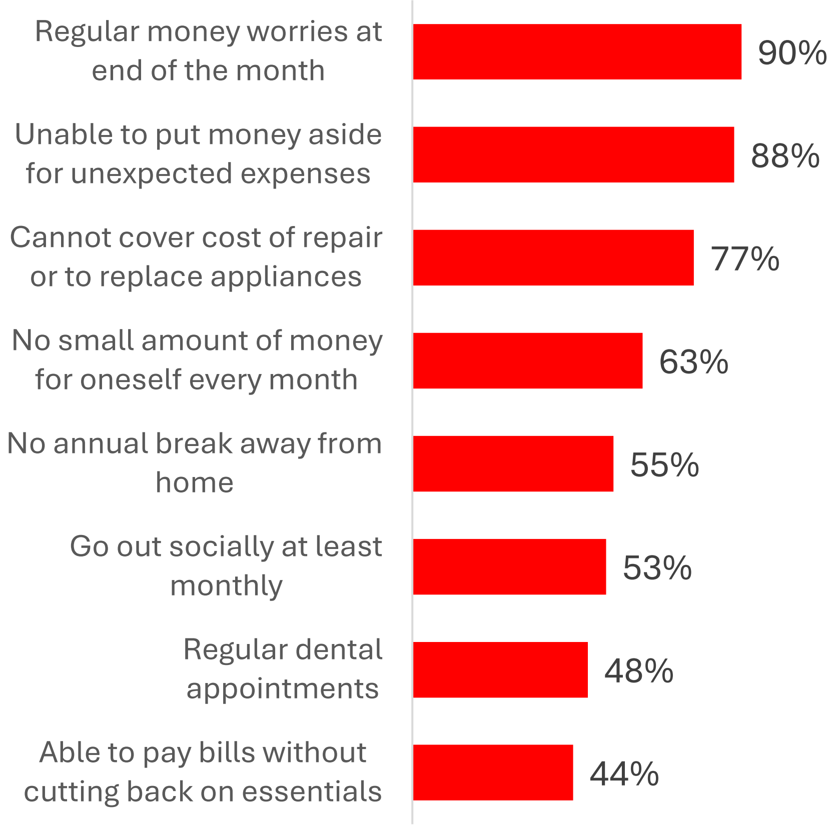
Material Deprivation score calculated based on responses to 22 questions. Base: Respondents with children aged 18 or under (861)

1 in 3 (33%) working age adults in Greater Manchester are considered materially deprived. 9 in 10 of this group have regular money worries at the end of the month (90%) and are unable to put money aside for unexpected expenses (88%). However, one third (33%) of those considered not materially deprived still say they experience regular money worries at the end of the month.

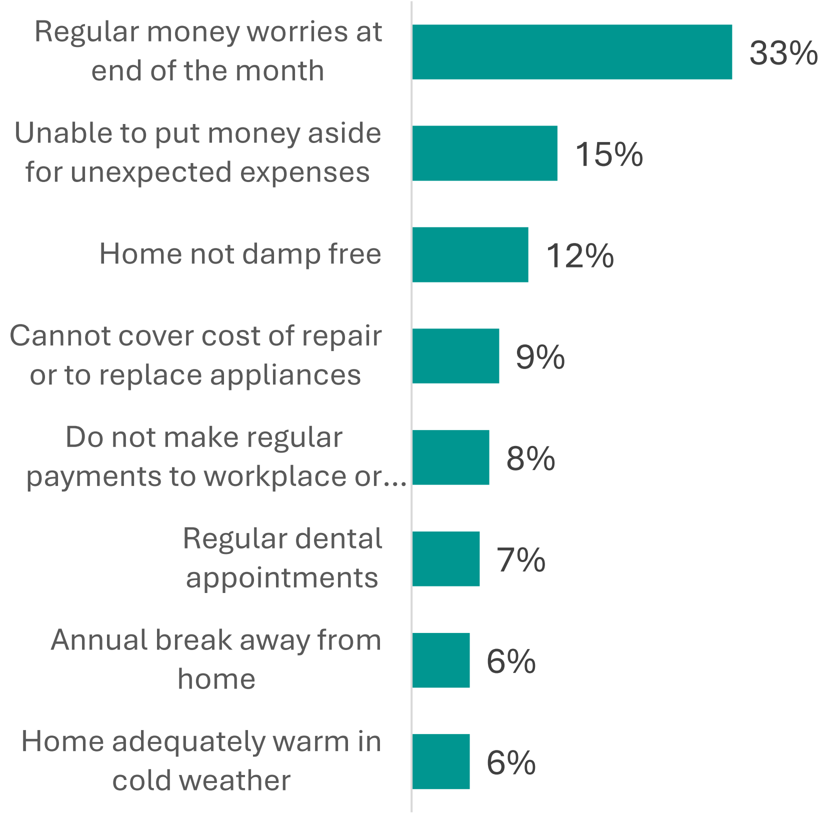
Are working age adults materially deprived?



Top scoring indicators of material deprivation (Red 33%)



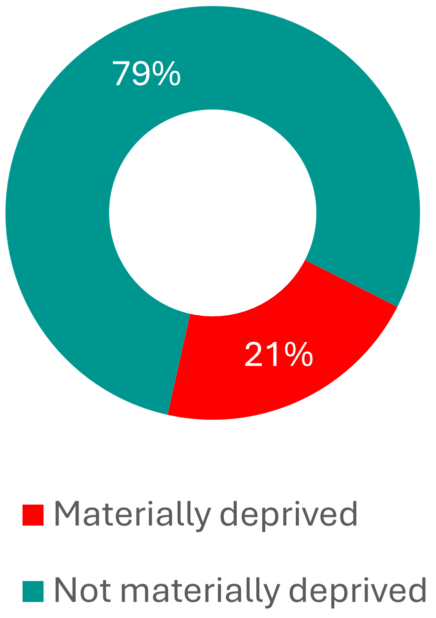
Top scoring indicators of *no* material deprivation (Green 67%)



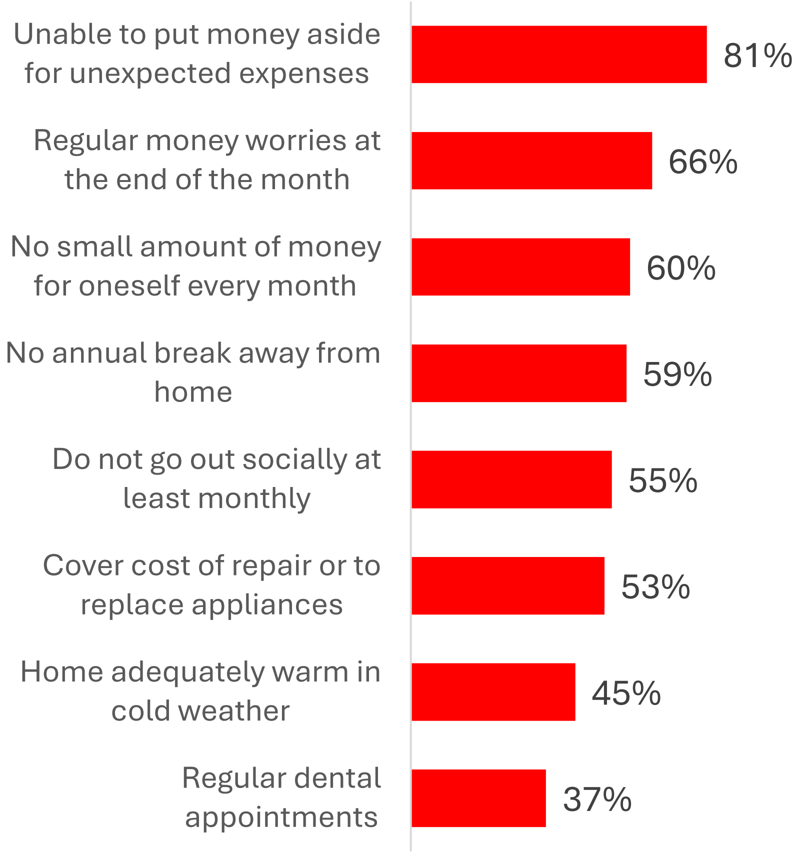
Material Deprivation score calculated based on responses to 21 questions. Base: Respondents aged 18-64 (1753)

1 in 5 (21%) of those aged 65+ are considered materially deprived. 4 in 5 (81%) materially deprived pensioners are unable to put money aside for unexpected expenses, and two thirds (66%) have regular money worries. 1 in 10 pensioners not materially deprived are also unable to put money aside (10%), are unable to keep their home damp free (8%) nor keep their home adequately warm in cold weather (8%).

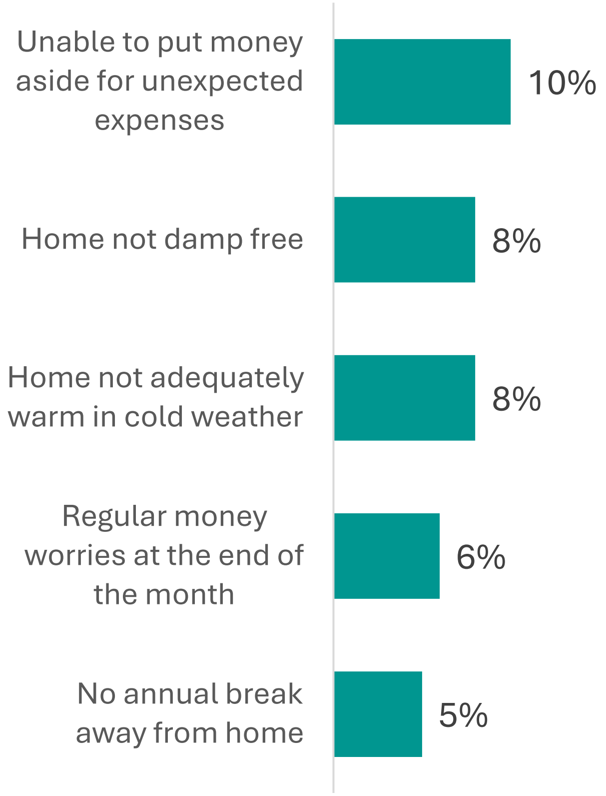
Are pensioners aged 65+ materially deprived?



Top scoring indicators of material deprivation (Red 21%)

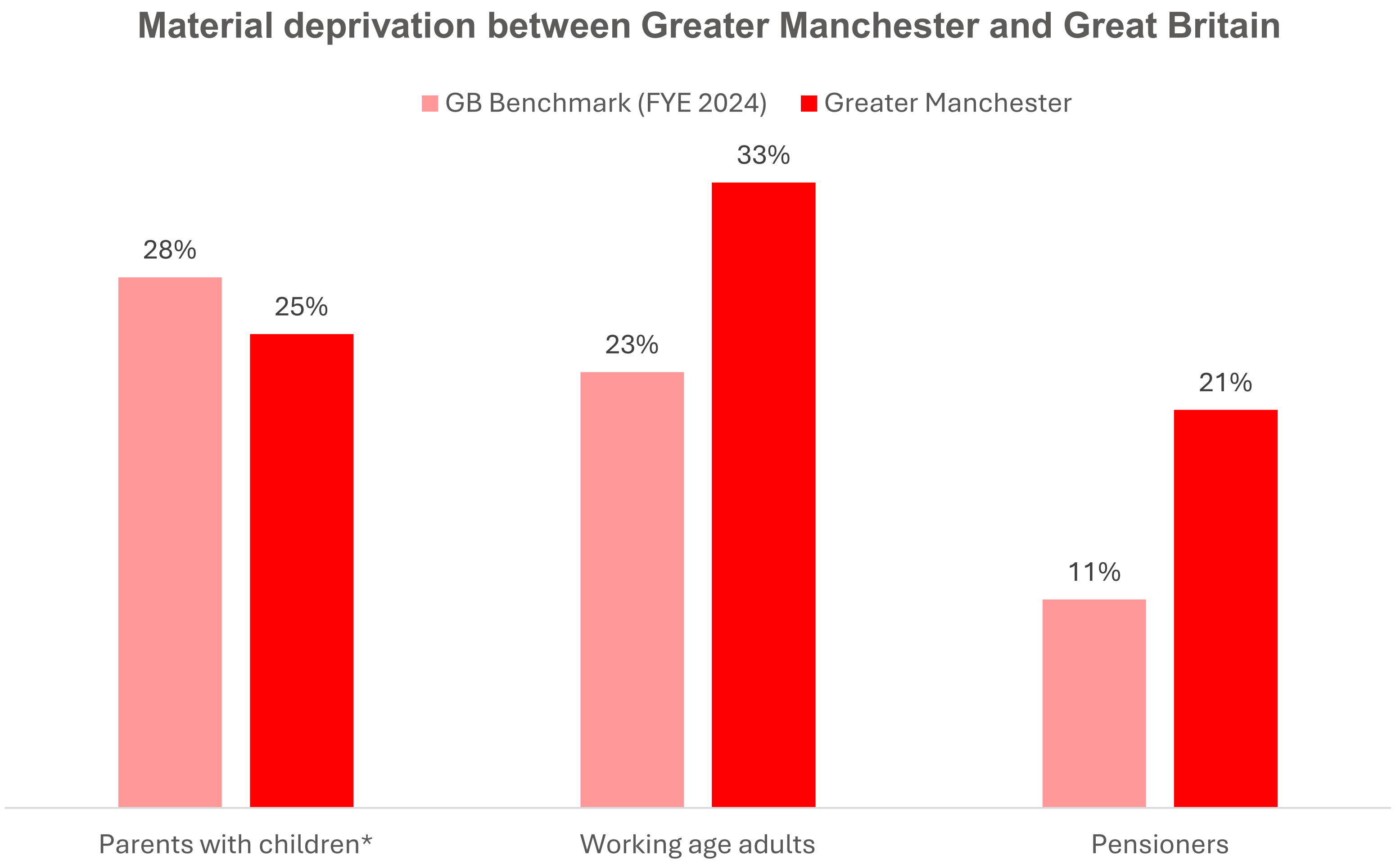


Top scoring indicators of *no* material deprivation (Green 79%)*



Material Deprivation score calculated based on responses to 19 questions. Base: Respondents aged 65+ (522)
*Only codes 5% and above shown

National benchmarking for Material Deprivation: Comparisons with data from DWP points to a greater number of GM working age respondents and pensioners being considered "materially deprived". However, comparisons to the national survey are exploratory at this stage and benchmarking should be seen as indicative only.



<u>Note on benchmarking comparisons</u>
Provisional analysis comparing our data and national benchmarking data suggests a reasonable degree of comparability between the two. However, the methodological approach of the two surveys varies considerably, with DWP's survey taking place primarily in-person rather than online. Furthermore, as these comparisons are still in the exploratory stage and benchmarking should be seen as indicative only.

<u>*Parents with children</u>
In national benchmarking survey, parents with children up to the age of 19 living in their household are included (all under 16s plus those aged 16-19 in approved education or training), whereas in our survey, children up to the age of 18 are included, regardless of education status.

<u>**Note on DWP Benchmarking methodology change between FYE 2023 and FYE 2024</u>
There was a methodological change (including questionnaire changes) between FYE 2023 and FYE 2024 for calculating material deprivation, hence comparisons with historic timeseries data nationally is not advised.

**National benchmarking material deprivation estimates from Department for Work and Pensions for FYE 2023 were 21% for children, 22% for working-age adults and 8% for pensioners. However, as per the note above, results between FYE 2023 and FYE 2024 are not comparable.

Further education for young people

Further education for young people – context

New for this wave is the inclusion of a suite of questions around the different pathways available to young people after secondary school but before they get a job. These questions have been introduced to provide baseline insights in relation to **residents' views and perspectives on both academic and technical options after school**, noting that the forthcoming Greater Manchester Strategy (GMS) includes a shared objective to establish "a clear line of sight to high quality jobs":

Greater Manchester wants to lead the way with social mobility – so that the young people who live here have a clear path towards a good job in our growing economy. By transforming technical education through the MBacc, we want to give young people a clear line of sight to high quality jobs in sectors that are growing in Greater Manchester. This will not only plug the gaps in the workforce market, it will also give young people increased access to essential life and work skills, growing their sense of hope and optimism for the future.

The survey invited respondents to think about what young people do after secondary school before they get a job, and then provide reflections / views on academic post-secondary school options (e.g. A-Levels and university), and similarly in relation or more 'technical' and 'vocational' post-secondary school options (e.g. T-Levels, BTEC courses or apprenticeships).

These questions are somewhat experimental, in that we have developed bespoke questions that do not align with the 'usual' questions asked in national surveys. Whilst some changes to these questions were made after an initial pilot launch, we are confident in the data produced at this stage. The content will be repeated in the summer wave of the Residents' Survey to consolidate the baseline understanding.

Further education for young people – key findings (1)

WHICH PATHWAYS ARE BETTER FOR YOUNG PEOPLE?

- Half (52%) of respondents say that both academic and technical/ vocational pathways are equally as good as each other at preparing young people for future jobs. Of those with stronger views, one quarter (26%) say that technical / vocational pathways are more effective, while 1 in 10 (10%) say that academic pathways are better.
    - Younger respondents aged 16-24 (20%) and those from within racially minoritised communities (16%) are among those that consider academic pathways to better prepare young people for future jobs. Those with very high levels of life satisfaction are also more likely to prefer academic options (13%) .
    - Whereas older respondents aged 65-74 (32%) and those with children in college (37%) are among those who consider technical/ vocational pathways to better prepare young people for future jobs. Those who feel they are treated unfairly by society are more likely to prefer technical or vocational options (31%).

BENEFITS OF ACADEMIC PATHWAYS

- Among the 10% (n=167) who think that academic pathways better prepare young people for future jobs, the top reasons were that academic pathways give young people more experience in a work environment (39%); that academic qualifications lead to better paying jobs (35%); and that academic qualifications are required for most jobs (35%).
- Among the 52% who think overall that both academic and technical pathways are equally as good as each other, academic qualifications are considered likely to lead to better paying jobs (34% felt this was true)

BENEFITS OF TECHNICAL/ VOCATIONAL PATHWAYS

- Among the 26% (n= 524) who think that technical or vocational pathways better prepare young people for future jobs, the top reasons attributed are that technical/ vocational pathways better prepare young people for work as they give young people more experience in a work environment (64%); provide young people with better knowledge and skills (57%); and that technical/ vocational post-secondary school options better prepare young people for life because young people do not have to pay fees (and, if it is an apprenticeship, will get paid) (48%).
- Among the 52% who think overall that both academic and technical pathways are as good as each other, the perceived benefits of technical / vocational pathways are they better prepare young people for work as they give young people more experience in a work environment (40%), however, similarly to academic pathways, many (28%) of this group say it depends on what jobs the young people want to go onto.

Further education for young people– key findings (2)

CONFIDENCE (AMONG PARENTS) IN TALKING OVER OPTIONS

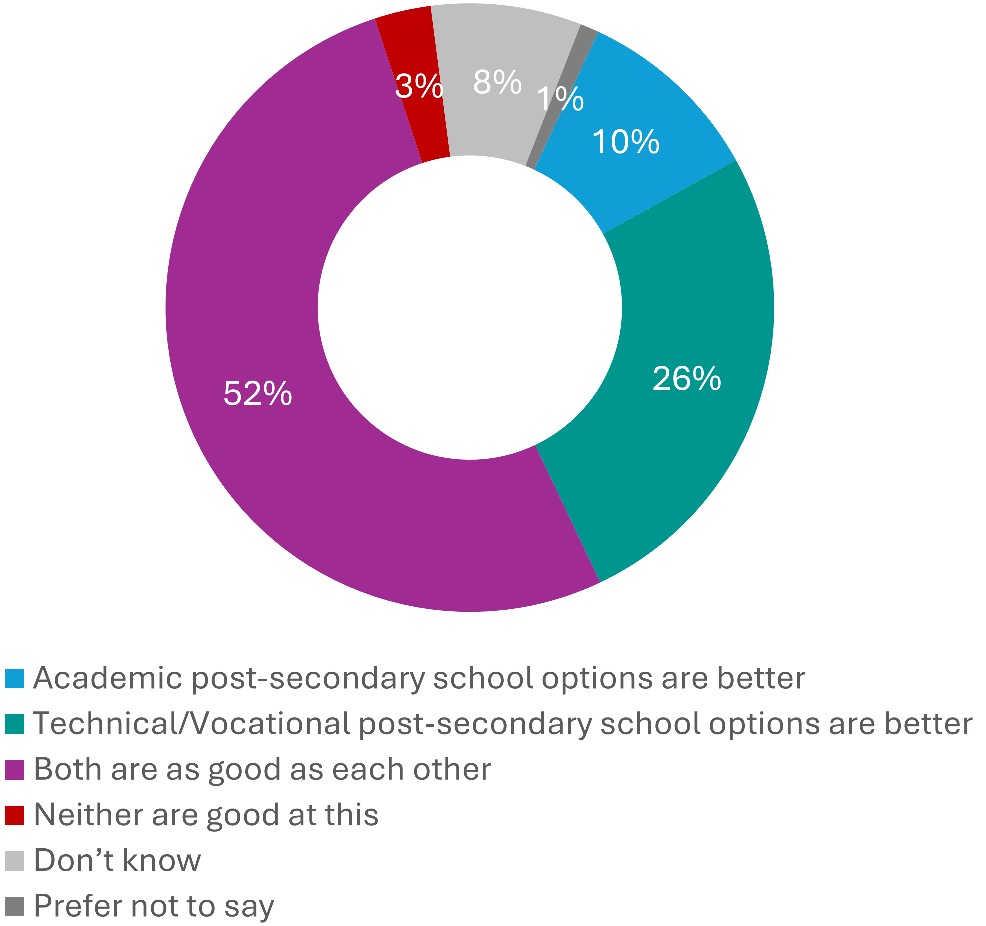
- 4 in 5 parents with children aged under 25 indicate they do, or would, feel confident talking to their child about exploring an academic pathway (85%) and a technical or vocational pathway (81%).

FINDING INFORMATION ON DIFFERENT PATHWAYS

- 65% of parents with children aged 12-25 said they have looked for information on academic or technical / vocational pathways before.
- Among those who have looked for information before (n=300), the majority have found it easy to find access to information and tips to support you in talking to their children about their options.
    - 81% have found it easy to access information on exploring academic pathways
    - 75% have found it easy to access information on exploring technical / vocational pathways
- When asked what would help equip them better when talking to their child about post-secondary school options, 52% said a dedicated website for parents, explaining the various study and employment choices available to them would help them.
    - This is followed by 47% who say the ability to speak directly with education providers and employers to find out about the various study and employment choices would help.

Our initial survey of ~1,900 GM respondents suggests one quarter of online respondents think that technical / vocational pathways better prepare young people for future jobs, with 1 in 10 saying the same for academic pathways. However, half of respondents think that both are as good as each other

Do more ‘academic’ or more ‘technical’ and ‘vocational’ post-secondary school options better prepare young people for future jobs?



MBACC1. In general, do you think that more ‘academic’ post-secondary school options (e.g. A-Levels and university), or more ‘technical’ and ‘vocational’ post-secondary school options (e.g. T-Levels, BTEC courses or an apprenticeship), better prepare young people for future jobs? Base: All online respondents (1923)

Younger respondents and those from within racially minoritised communities prefer academic options. Older respondents and those from homogeneous backgrounds prefer technical or vocational options

% who are significantly more likely to think academic options are preferrable compared to the GM average (10%):*

Demographics:

- Muslim respondents (23%)
- Those aged 16-24 (20%), and those aged 25-34 (14%)
- Those from within racially minoritised communities (16%), including black respondents (20%), or for whom English is not their native language (18%)
- Those with a condition that reduces their ability to do activities by a lot (14%)
- Those with caring responsibilities (14%)
- Parents (12%), including those of children under 5 (16%), and between 5-15yos (13%)

Individual and/or family circumstance:

- Those earning below the Real Living Wage (17%), and above it (11%)
- Those working in the public sector (15%)
- Those who have volunteered in the last 12 months (15%)
- Renters (13%)
- Those with very high life satisfaction (13%)
- Those in full-time employment (12%)
- Those treated fairly by society (12%)
- Those who feel lonely at least some of the time (12%)
- Those who believe their local area celebrates diversity and promotes equality (12%)

% who are significantly more likely to think technical or vocational options are preferrable compared to the GM average (26%):*

Demographics:

- Parents of children in college (37%)
- Rochdale residents (36%)
- Those aged 65-74 (32%)
- Those whose first language is English (27%)

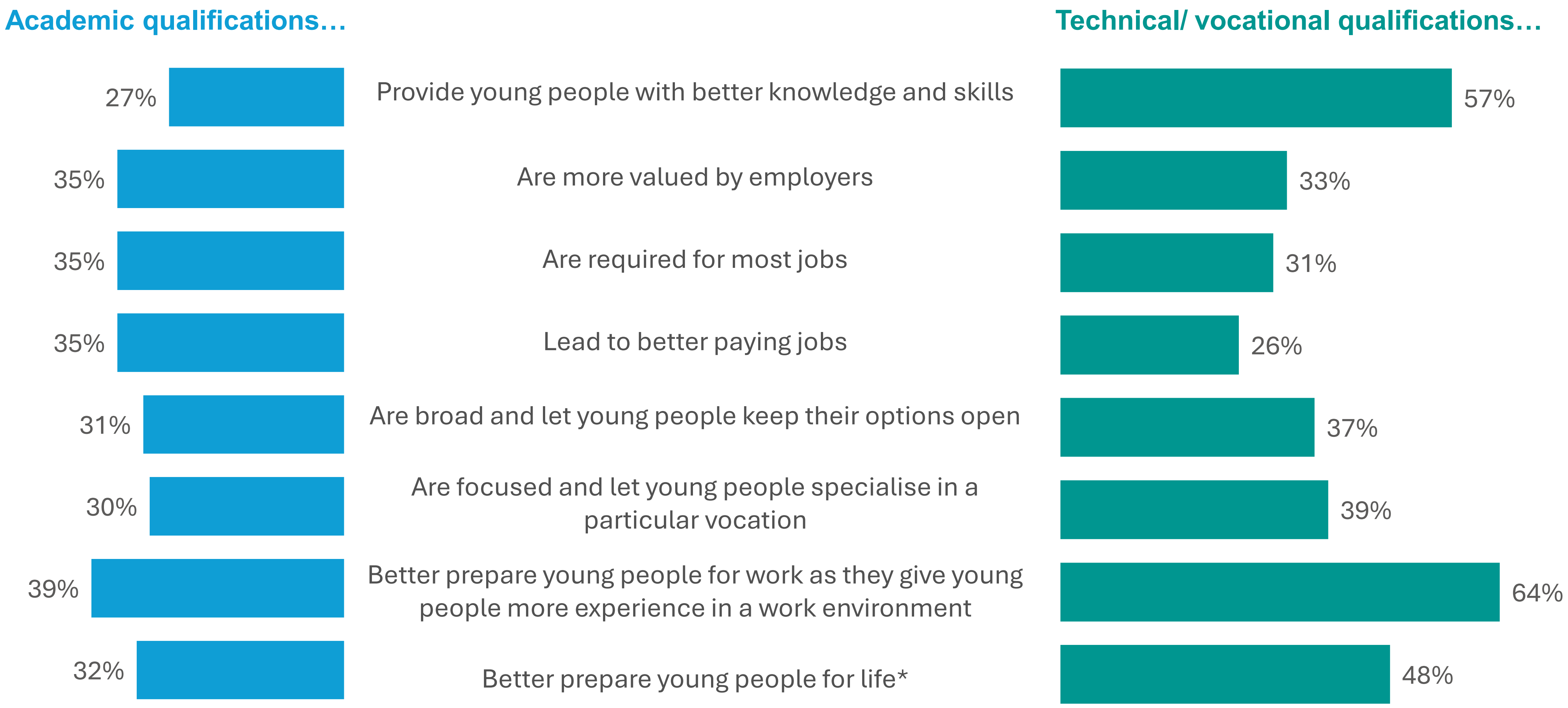
Individual and/or family circumstance:

- Those who disagree that their local area celebrates diversity and promotes equality (32%), and those who disagree that people who come from other countries make a valuable contribution to Greater Manchester (34%)
- Those earning between £15,600 - £36,400 (31%)
- Those with low levels of hopefulness (31%)
- Those who feel they are treated unfairly by society (31%)
- Those who have experienced discrimination in a social situation or with close friends or peers (31%)
- Those who have completed an apprenticeship (30%)
- Those experiencing one aspect of material deprivation (28%)

MBACC1. In general, do you think that more 'academic' post-secondary school options (e.g. A-Levels and university), or more 'technical' and 'vocational' post-secondary school options (e.g. T-Levels, BTEC courses or an apprenticeship), better prepare young people for future jobs? Base: All online respondents (1923)

Those who think technical / vocational pathways are better for young people are more likely to say that they better prepare young people for work, for life, and provide young people with better knowledge and skills compared to those who prefer academic pathways

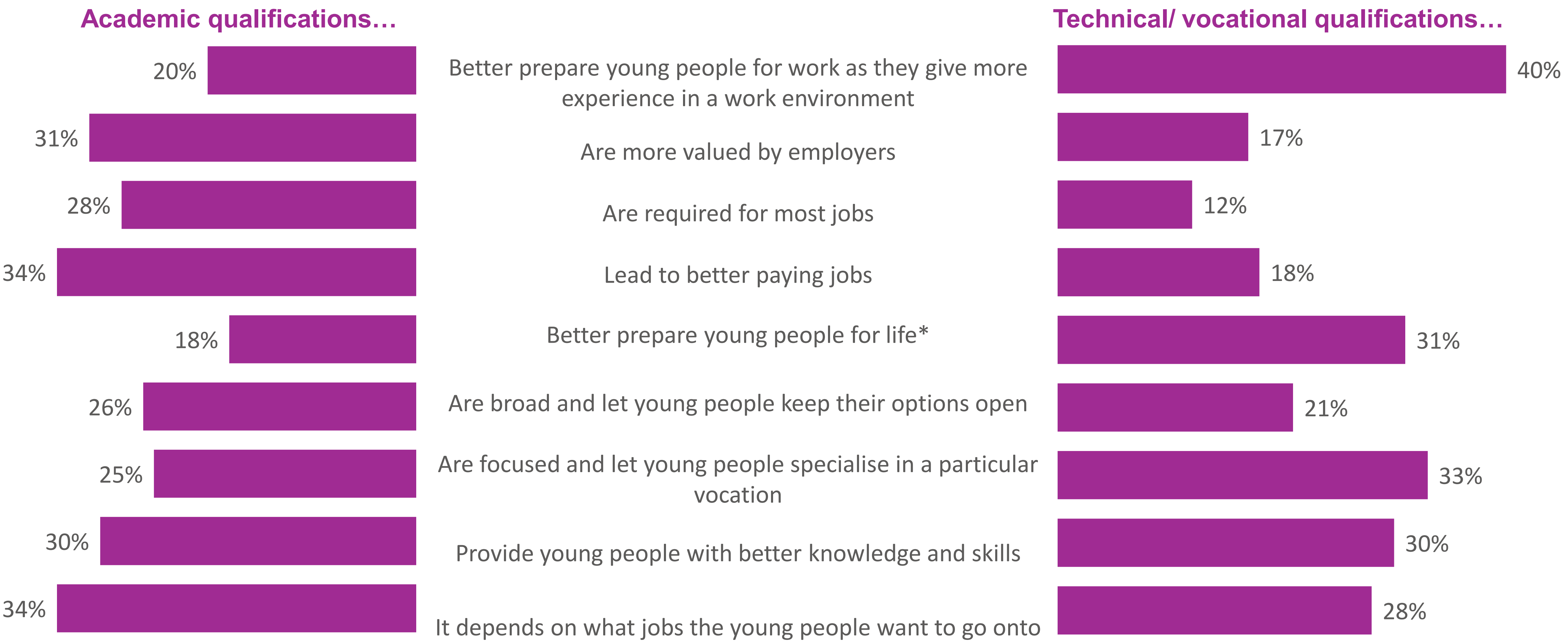
Why are academic or technical/vocational pathways better at preparing young people for future jobs?



MBACC2. Why do you think academic pathways are better at preparing young people for future jobs? Base: Those who think academic post-secondary school options are better at preparing young people for future jobs (167) / MBACC3. Why do you think technical/vocation pathways (post-16) are better at preparing young people for future jobs? Base: Those who think technical/vocational post-secondary school options are better at preparing young people for future jobs (524). Data for Other/ Don't know/ Prefer not to say not included on chart. *Wording differed based on if answering about academic or technical/ vocational qualifications.

Amongst respondents who feel that academic and technical qualifications are "as good as each other" at preparing young people for future jobs (half our sample), the relative strengths of each are recognised – key comparisons shown below

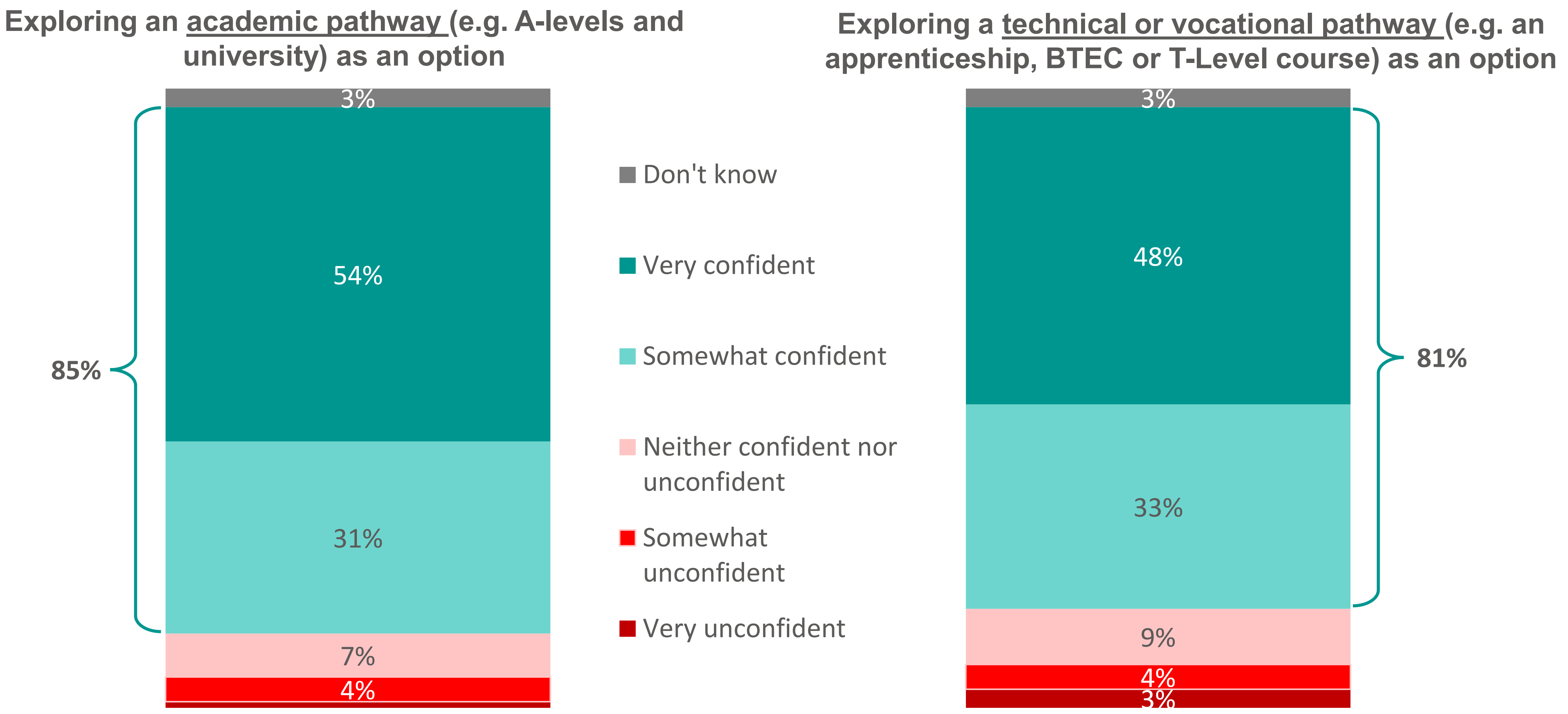
What about academic or technical/ vocational pathways are good at preparing young people for future jobs?
Among the 52% who said both academic and technical/ vocational qualifications are as good as each other



MBACC2A. What about academic pathways are good at preparing young people for future jobs? MBACC3A. What about technical/vocation pathways (post-16) pathways are good at preparing young people for future jobs? Base: Those who think both academic and technical/vocational options are good (608). Data for Other/ Don't know/ Prefer not to say not included on chart. *Wording differed based on if answering about academic or technical/ vocational qualifications.

Amongst parents with children aged 25 and under, the majority are confident about talking with their child about exploring academic pathways (85% feel confident, 5% feel unconfident) and technical or vocational pathways (81% feel confident, 6% feel unconfident).

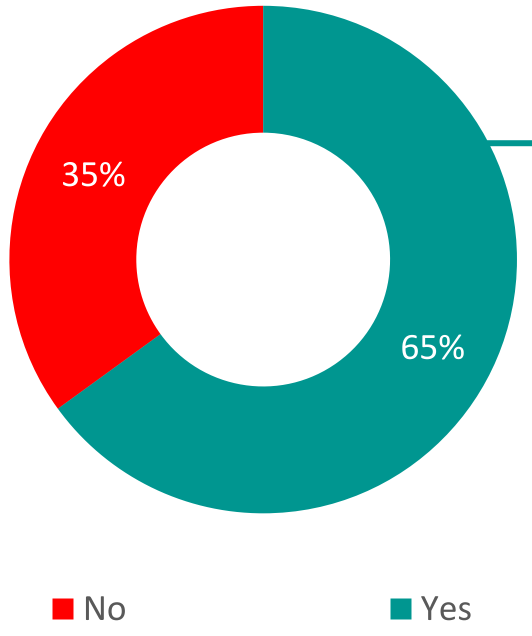
How confident do you, or would you, feel about talking with your child about…?



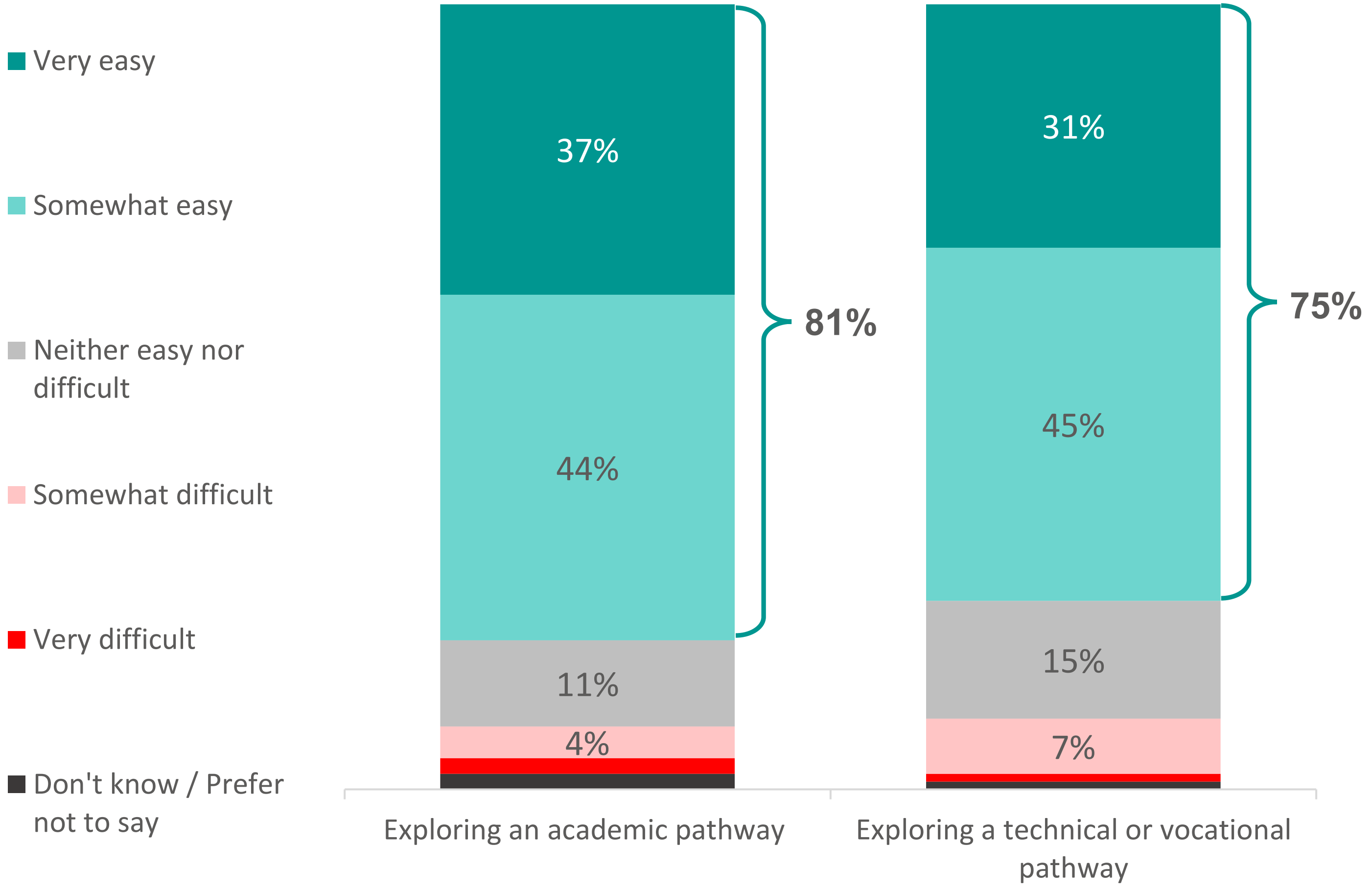
MBACC5. How confident do you, or would you, feel about talking with your child about…? Base: Respondents with children aged 25 or under (840)

2 in 3 (65%) of parents with children aged between 12-25 years of age have looked for information on technical or academic pathways before. Of these, 4 in 5 (81%) found it easy to access information on exploring academic pathways, while 3 in 4 (75%) found it easy to access information on exploring technical or vocational pathways

Have you ever looked for information on academic or technical / vocation pathways before?



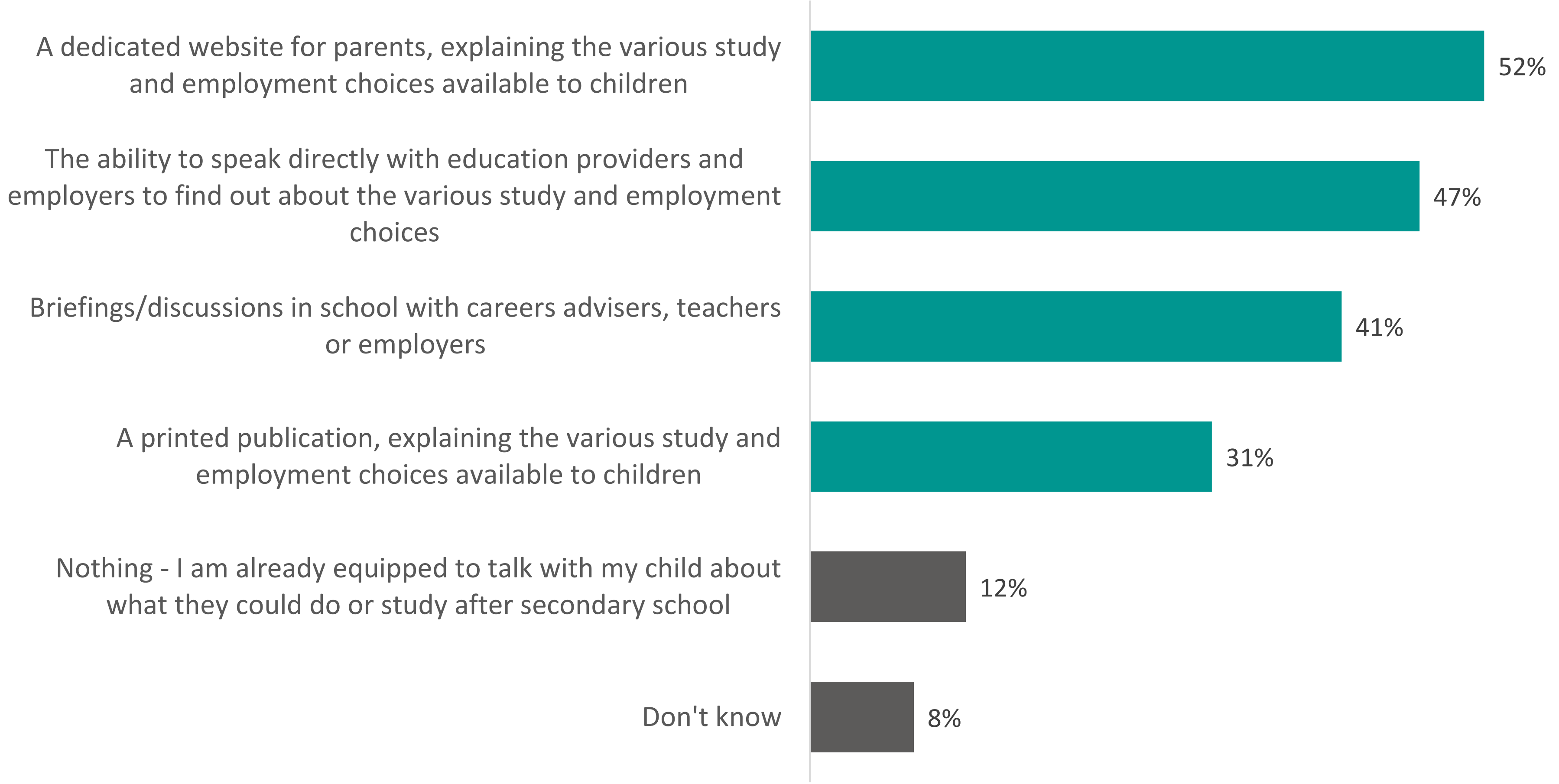
How easy or difficult do you, or have you, found it to access information and tips to support you talking with your child about…?



MBACC4A. Have you ever looked for information on academic or technical / vocation pathways before? Base: Respondents with children aged between 12-25, 459. MBACC4. How easy or difficult do you, or have you, found it to access information and tips to support you talking with your child about…? Base: All who have looked for information before (300)

Around half of parents say a dedicated website for them that explains the different options available (52%), as well as having the ability to speak directly with education providers and employers about the various choices (47%), would help equip them better to talk to their children about their post-secondary school choices

What would help equip you better when talking with your child about what they could do or study after secondary school?



MBACC6. What would help equip you to talk with your child about what they could do or study after secondary school? Base: Respondents with children aged between 12 and 25, 334

Digital inclusion

Findings from the December 2024 to May 2025 survey merged into groups of three waves (trio of face-to-face samples)

Unweighted base: 875 (Face to face respondents S16+17+18)

Digital inclusion – context

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

For this report, we start with a high-level overview of survey results over the past two years, before moving into a summary of findings specifically relating to the last six months (we have merged findings for survey 18 (May 2025) with those from survey 17 (February 2025) and survey 16 (December 2024)). All three of these recent surveys have used a face-to-face interview approach.

* Base sizes: Survey 16: December 2024 (250), Survey 17: February 2025 (250), Survey 18: May 2025 (375). We do not ask digital inclusion themed questions of those respondents who complete the Residents' Survey via an online method.

Digital inclusion – Key findings

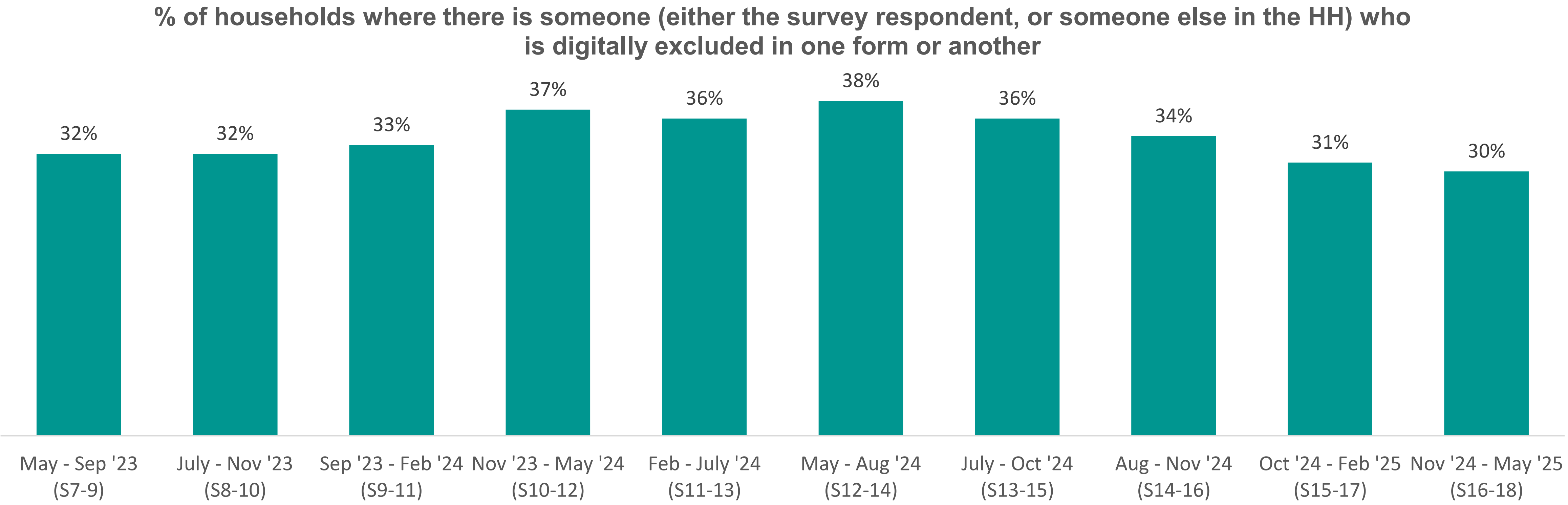
OVERALL LEVELS OF DIGITAL EXCLUSION

- In this latest survey, around 3 in 10 respondents said there is someone in their household who experiences some form of digital inclusion – either an issue with reliable devices/internet connection; an affordability barrier; a skills need; or a support need.
- Higher levels of digital exclusion were reported in May 2024 and August 2024. At the time, this was felt in part due to a change in survey methodology just ahead of the May 2024 fieldwork (from telephone interviews to face-to-face). Long-term tracking increasingly suggests, however, that overall levels of digital exclusion captured in the survey have not changed fundamentally in the last 2 years

SUPPORTING INSIGHTS (all insights relate to the last six months' fieldwork, Dec 2024 – May 2025)

- **How many issues / barriers?** Data continues to suggest that 6% of respondents report a combination of factors in their household that span all 5 aspects of digital inclusion we ask about (internet connection; devices; affordability; skills; support needs)
- **Main issue / barrier?** Experiences of digital exclusion continue to be driven most by those saying that they, or others in their household, have a lack of skills or support to allow them to access digital online services
- **Who is experiencing digital exclusion?** Three quarters of older (75+) respondents and half of disabled respondents report one or more aspect of digital exclusion in their household. The figure for older respondents has been slightly higher in recent waves than equivalent estimates historically
- **Confidence in using digital services online**: 1 in 10 respondents have said they (15%) or others in their household (12%) are not confident using digital services online. In combination this equates to a fifth (20%) of households with someone lacking confidence
- **Desire to use digital services more:** Around a fifth (19%) of households use digital services already, but want to use them more. Conversely, just 1% of people who do not use digital services online want to be able to do so

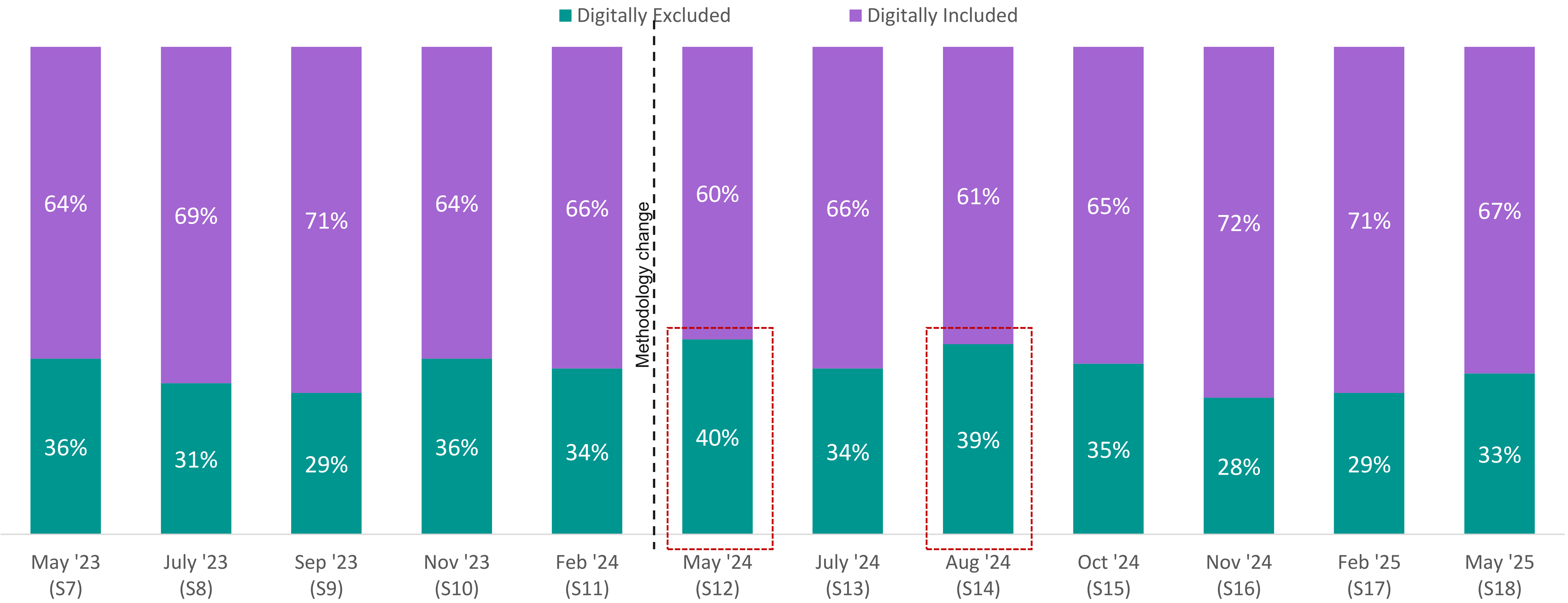
Latest position (headline): In our latest survey, **around 3 in 10 respondents said there is someone in their household who experiences some form of digital inclusion** – either an issue with reliable devices/internet connection; an affordability barrier; a skills need; or a support need



DI11. How often…? Unweighted base: 240 – 375 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

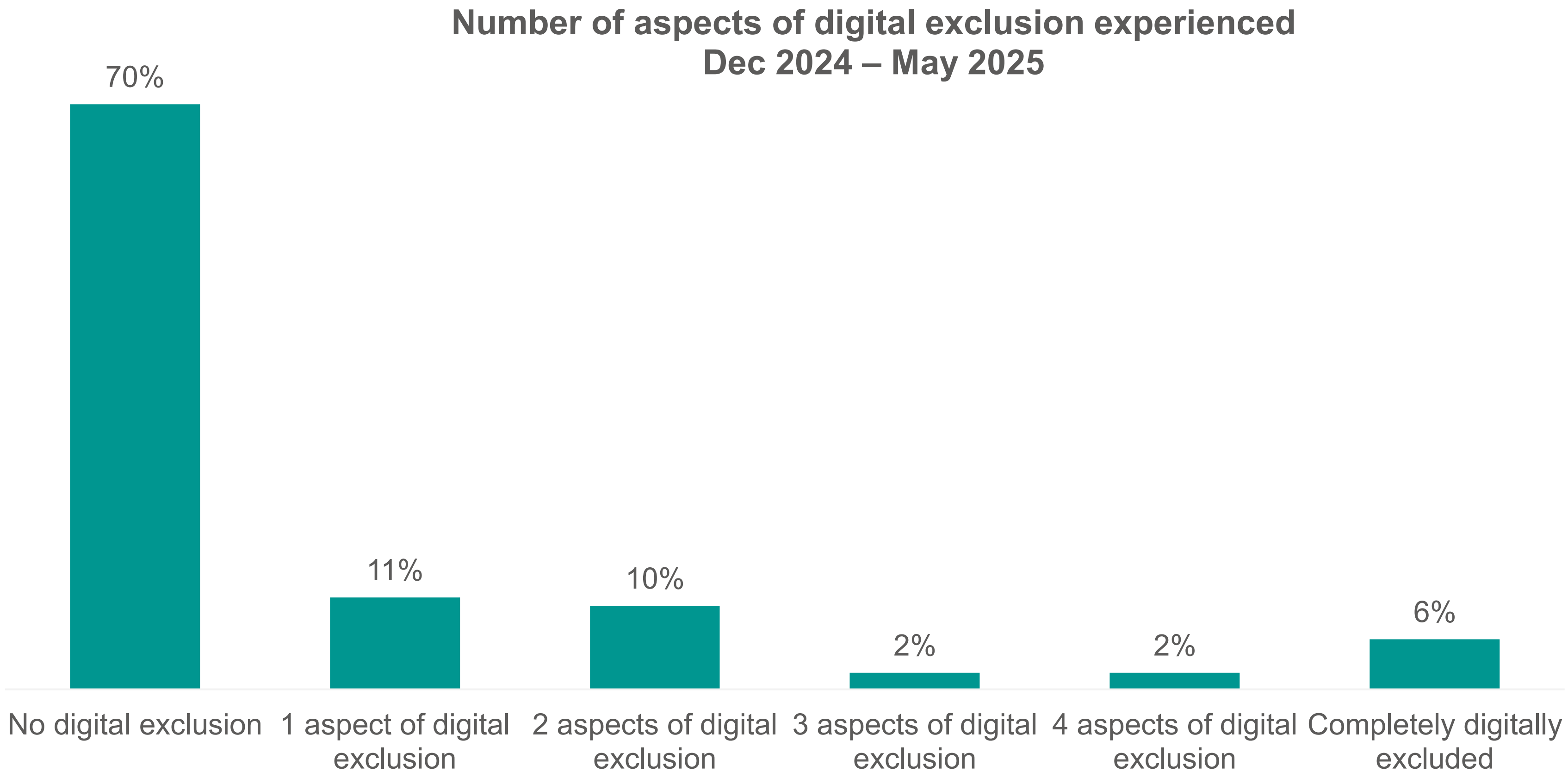
Tracking over time: Higher levels of digital exclusion were reported in May 2024 and August 2024. At the time, this was felt in part due to a change in survey methodology just ahead of the May 2024 fieldwork (from telephone interviews to face-to-face). Long-term tracking increasingly suggests, however, that overall **levels of digital exclusion captured in the survey have not changed fundamentally in the last 2 years**

Proportion of digital exclusion – long term trends



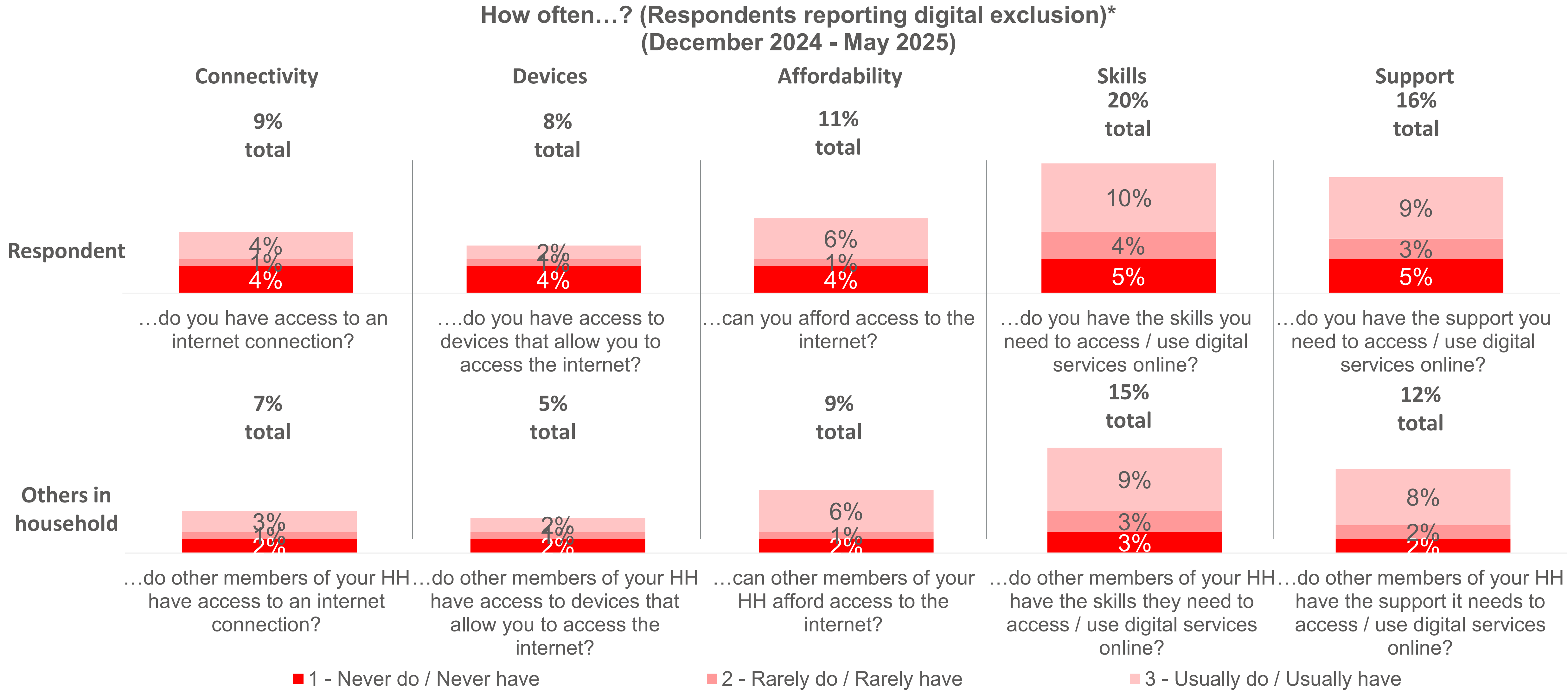
DI11. How often…? Unweighted base: 240 – 375 Prefer not to say not shown. Question in was asked as a grid, between “you” and “others in your household”. The data on this slide shows the percentages of households where there is someone (either you or others) who has said they are digitally excluded. *Aspects 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

How many issues / barriers? Unpacking the headline statistic - 3 in 10 digitally excluded - continues to suggest that 6% of respondents report a combination of factors in their household that span all 5 aspects of digital inclusion we ask about (internet connection; devices; affordability; skills; support needs)



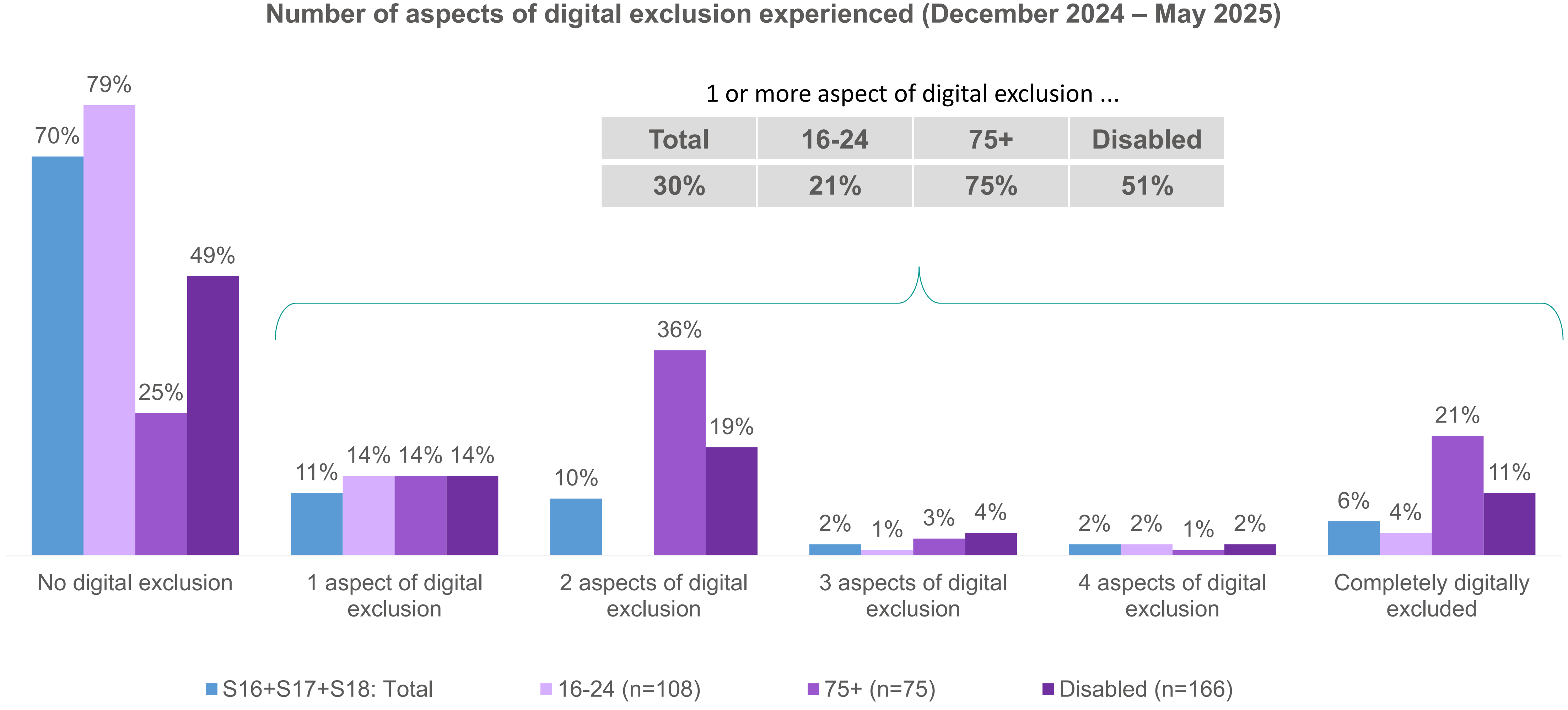
DI11. How often…? Unweighted base: S10-12 (760), S16-18 (875) (Face to Face respondents) Prefer not to say not shown. Question in S6 onwards was asked as a grid, between “you” and “others in your household”. The data on this slide shows the percentages of households where there is someone (either you 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

What's the main issue / barrier? Experiences of digital exclusion continue to be driven most by those saying that they, or others in their household, have a lack of skills or support to allow them to access digital online services



DI_11. How often…? Unweighted base: 756; Survey 16, 250; Survey 17, 250, Survey 18, 375; (Face to face respondents) *Prefer not to say, 4, and 5 (Mostly do / have and Always do / have) not shown.

Who is experiencing digital exclusion? Three quarters of older (75+) respondents and half of disabled respondents report one or more aspect of digital exclusion in their household. The degree to which this is a single issue, or multiple issues, is shown in the chart



DI11. How often…? Unweighted base: 875 (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

How often are barriers experienced? High proportions of **respondents aged 75+ and disabled respondents live in a household face barriers "all of the time", or "most of the time".** The chart provides the latest stats on the extent of these recurrent/enduring issues

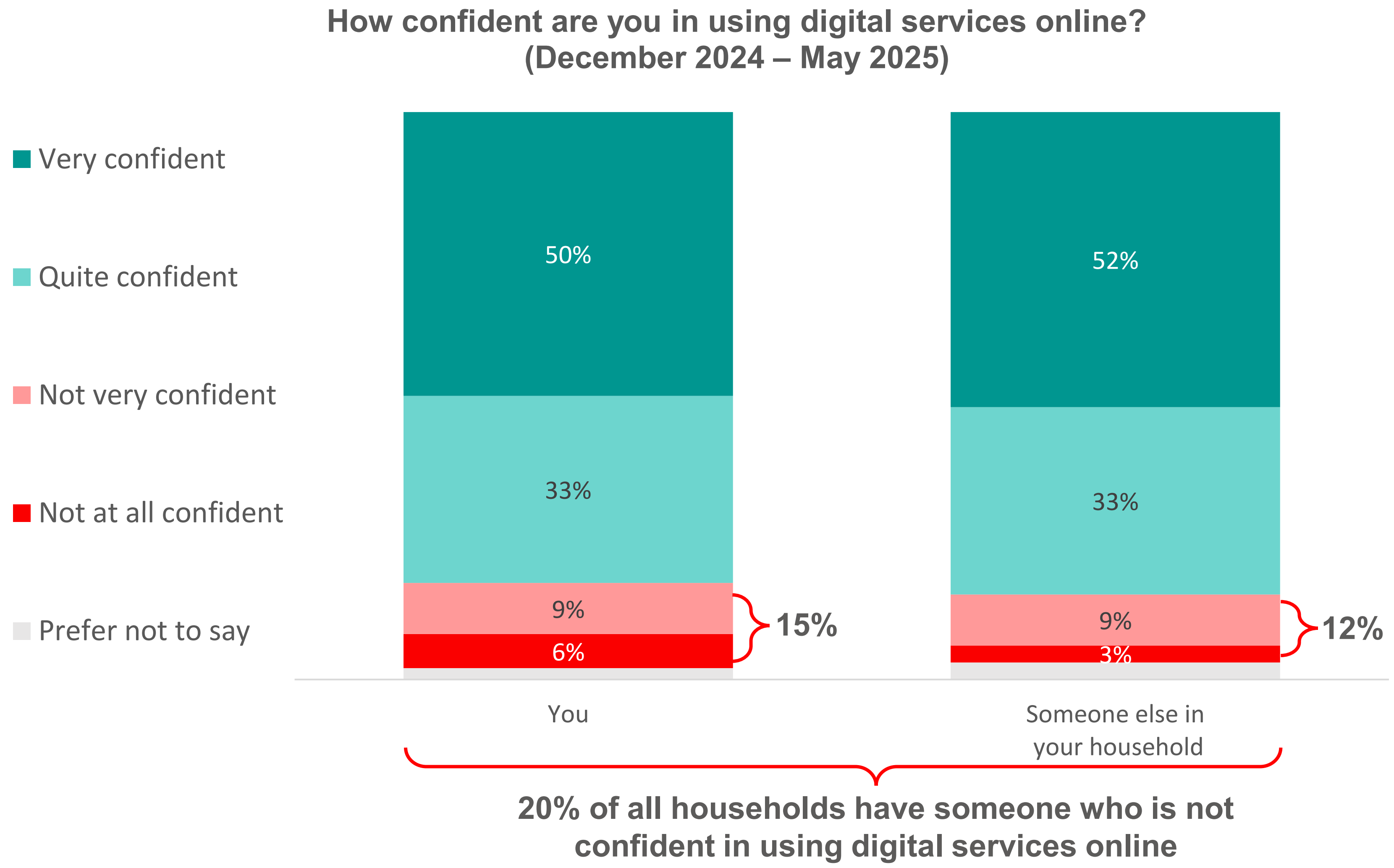
How often do you/do others in your household…?
(Showing households without the access/skills to get online all/most of the time)
December 2024 – May 2025

	Total	Aged 16-24 (n=108)	Aged 75+ (n=75)	Disabled respondents (n=166)
…have consistent and reliable access to an internet connection at home?	10%	5%	21% ↑	16% ↑
…have consistent and reliable access to devices that allow access to the internet and use digital services online?	8%	6%	24% ↑	14% ↑
…can afford access to the internet?	12%	7%	28% ↑	23% ↑
…have the skills they need to access and use digital services online?	24%	15% ↓	74% ↑	44% ↑
…have support needed to access and use digital services online?	18%	10% ↓	55% ↑	33% ↑

↑↓ Significantly higher/lower than total

DI_11. How often…? Unweighted base: 875; Survey 16, 250; Survey 17, 250; Survey 18, 375; (Face to face respondents)

Confidence in using digital services online: Over the last six months, 1 in 10 respondents have said they (15%) or others in their household (12%) are not confident using digital services online. In combination this equates to a fifth (20%) of households with someone lacking confidence



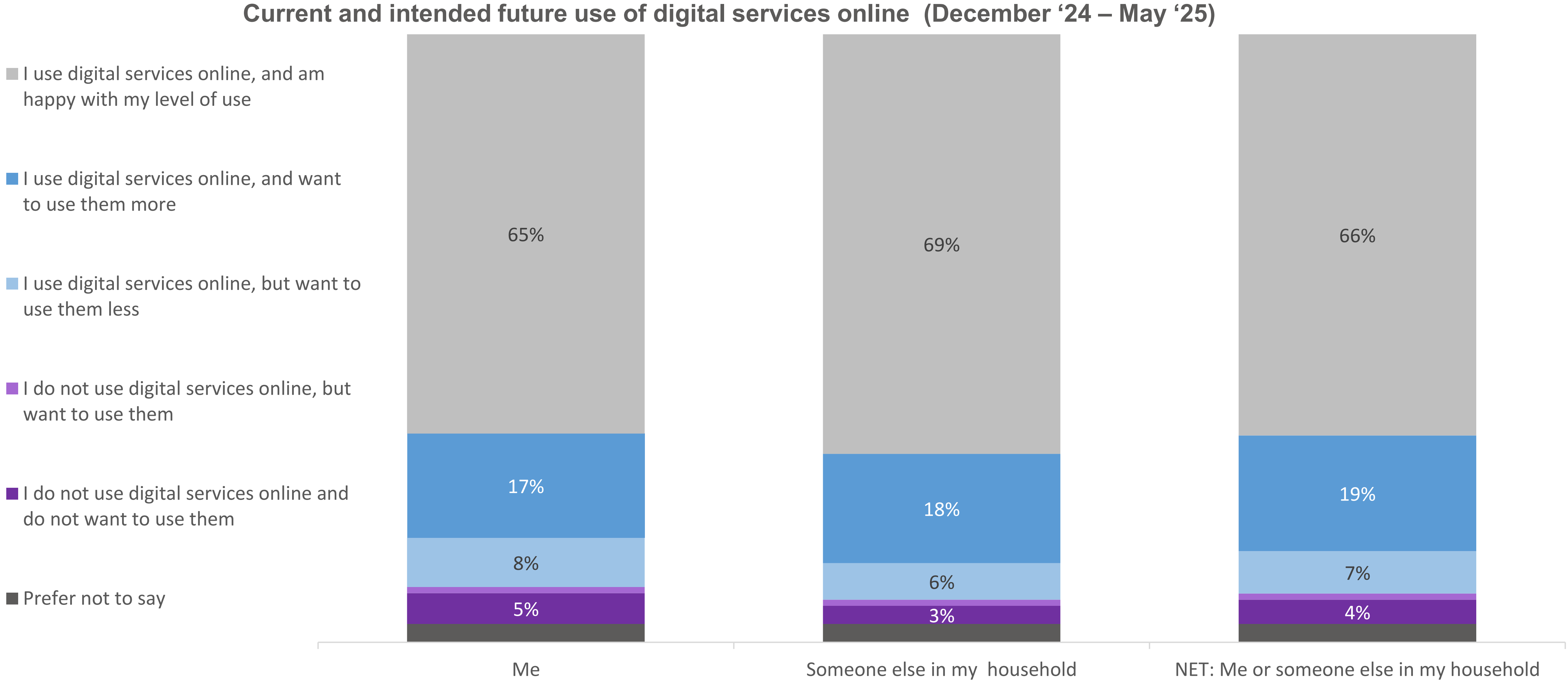
Respondents or someone in their household in the face-to-face sample more likely to be not very/not at all confident in using digital services online (vs. 20% GM average):

Demographics:

- Those aged 75+ (63%)
- Those aged 65+ in single person households (54%)
- Retired respondents (50%)
- Those aged over 50 and with a condition that reduces their ability to do activities (50%)
- Disabled respondents (33%) including those with a mobility disability (50%) and those with other disabilities (35%)
- Christian respondents (30%)
- Those who own their homes outright (26%), who rent from local authorities or councils (30%), or who rent from housing associations or trusts (28%)
- Females (22%)

DI10. Overall, how confident is your household in using the digital services online that it needs and wants?
Unweighted base: 756; Survey 16, 250; Survey 17, 250; Survey 18, 375 (Face to face respondents)

Desire to use digital services more: 19% of households use digital services already, but want to use them more. Conversely, just 1% of people who do not use digital services online want to be able to do so – in line with previous surveys



DI8. How would you describe your current and future intended use of digital services online?
Unweighted base: 756; Survey 16, 250; Survey 17, 250; Survey 18, 375 (Face to face respondents)

Appendix

More detail on changes in survey methodology

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

Surveys 1-11	Surveys 12-17	Surveys 18 – (June 2025 –)
Online panels (n=750)	Online panels (n=750)	Online panels (n=1,050)
River sampling (n=500)	Online rapid sampling (n=500)	River sampling (n=325)
Telephone sampling (n=250)	Face-to-face sampling (n=250)	Online rapid sampling (n=500)
		Face-to-face sampling (n=375)

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

Increasing our sample size means we are able to split our total sample across fewer waves and stay in field longer each time. By doing so, we can increase the sample size for key demographic groups that would have previously needed multiple waves before reporting. We are also better able to monitor quotas over longer fieldwork periods.

Including both river sampling and online rapid sampling means we can better target underrepresented digital users and extend our reach outside those who are typically found on panels, while also benefiting from river sampling. As these are a form of panel users, we are able to achieve the full sample size needed.

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

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

Significance Testing and statistical difference – technical note

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

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

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

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

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

Material deprivation – scoring methodology (cut-off points for each group)

<table>
<tr><th>Total Items</th><th>Parents with children under 18</th><th>Working Age Adults</th><th>Pensioners</th></tr>
<tr><td>0</td><td rowspan="4">Not materially deprived</td><td rowspan="5">Not materially deprived</td><td rowspan="4">Not materially deprived</td></tr>
<tr><td>1</td></tr>
<tr><td>2</td></tr>
<tr><td>3</td></tr>
<tr><td>4</td><td rowspan="19">Materially deprived (lacking in 4+ items)</td><td rowspan="16">Materially deprived (lacking in 4+ items)</td></tr>
<tr><td>5</td><td rowspan="17">Materially deprived (lacking in 5+ items)</td></tr>
<tr><td>6</td></tr>
<tr><td>7</td></tr>
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</table>

Calculations

A respondent is considered materially deprived if they indicate not having an item or being able to participate in an activity and the reason being either they do not have money for this, or it is not a priority on their current income.

Household questions

- All respondents were asked a **total of 11 household related questions** including ability to pay bills without cutting back on essentials, having a home in good state of decoration or repair, and reliable access to internet – for the full list of household questions please see here.

Parents with children under 18

- Parents with children under the age of 18 were asked 11 questions of relevance to this age group in addition to the household questions for a total of 22 questions. Material deprivation applies for this group if they are lacking in 4 or more items. For the full list of children questions please see here.

Working-age adults

- Working-age adults (18-64) were asked 10 questions of relevance to this age group in addition to the household questions for a total of 21 questions. Material deprivation applies for this group if they are lacking in 5 or more items. For the full list of working-age questions please see here.

Pensioners

- Pensioners (65+) were asked 8 questions of relevance to this age group in addition to the household questions for a total of 19 questions. Material deprivation applies for this group if they are lacking in 4 or more items. For the full list of pensioner questions please see here.

Sample information (surveys 1-9)

Survey	1	2	3	4	5	6	7	8	9
Fieldwork start	9 Feb 22	25 Mar 22	1 Sep 22	20 Oct 22	7 Dec 22	2 Mar 23	5 May 23	26 June 23	4 Sept 23
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
Report publication	Mar 22	Apr 22	Sep 2022	Nov 2022	Jan 2023	Apr 2023	June 2023	July 2023	Sept 2023
Total respondents	1385	1467	1677	1636	1470	1767	1488	1612	1560
Web respondents	762 (55%)	794 (54%)	785 (47%)	791 (48%)	721 (49%)	765 (43%)	789 (53%)	766 (48%)	755 (48%)
F2F (previously phone) respondents	250 (18%)	250 (17%)	235 (14%)	270 (17%)	250 (17%)	250 (14%)	251 (17%)	250 (16%)	248 (16%)
Online rapid									
River sampling (new in W18)	373 (27%)	423 (29%)	657 (39%)	575 (35%)	499 (33%)	752 (43%)	448 (30%)	596 (37%)	557 (36%)

Sample information (surveys 10-18)

Survey	10	11	12	13	14	15	16	17	18
Fieldwork start	13 Nov 23	29 Jan 24	13 May 24	8 July 24	19 Aug 24	14 Oct 24	9 Dec 24	17 Feb 25	24 Apr 25
Fieldwork end	29 Nov 23	13 Feb 24	25 May 24	19 July 24	2 Sept 24	28 Oct 24	23 Dec 24	28 Feb 25	12 May 25
Report publication	Dec 2023	Mar 2024	June 2024	Aug 2024	Sept 2024	Nov 2024	Jan 2025	March 2025	June 2025
Total respondents	1546	1460	1551	1540	1482	1517	1523	1515	2298
Web respondents	754 (49%)	766 (52%)	775 (50%)	770 (50%)	775 (52%)	759 (50%)	762 (50%)	775 (51%)	1184 (52%)
F2F (previously phone) respondents	250 (16%)	259 (18%)	251 (16%)	250 (16%)	241 (16%)	266 (18%)	250 (16%)	250 (17%)	375 (16%)
Online rapid			525 (34%)	517 (34%)	463 (31%)	492 (32%)	511 (34%)	487 (32%)	459 (20%)
River sampling (new in W18)	542 (35%)	435 (30%)							280 (12%)

Key demographics (before weighting applied)

Survey	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Male	597	593	739	666	686	782	657	701	680	664	673	678	657	598	668	673	630	1054
Female	761	843	906	970	784	964	831	877	852	840	766	843	856	866	823	806	853	1185
16-24	113	96	123	170	111	114	133	146	123	139	150	138	139	156	141	151	161	235
25-44	413	421	455	503	440	483	487	457	412	460	405	531	543	451	496	536	517	760
45-64	484	538	525	565	570	644	506	624	607	506	489	546	566	572	557	533	525	781
65+	375	412	574	398	349	526	362	385	418	441	416	336	292	303	323	303	312	522
White	1201	1314	1503	1405	1297	1572	1278	1390	1358	1319	1253	1251	1281	1259	1284	1266	1238	1917
Within racially minoritised communities	166	137	159	208	173	181	194	197	194	218	195	218	246	216	222	244	263	369

Carried out on behalf of Greater Manchester partners by

BMG

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