



people's panel
making your voice count



People's Panel January 2023 Analysis Report

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Introduction and Methodology

Introduction

This survey was conducted between January and February 2023. Questions covered the following topics:

- Happiness and Wellbeing
- Personal Finances
 - Current Financial Situation
 - Financial Stability Checker
 - The Previous Year
 - The Year Ahead
- Outdoor Sports Facilities

The People's Panel includes residents of both Hull and the East Riding. The latter often work, shop, and use the entertainment facilities in Hull, as well as access some services such as healthcare.

Methodology

This survey was open to People's Panel members, and non-members, across Hull and East Riding, over a six-week period between August and September 2022.

As usual, an electronic version of the survey was emailed to over 3,800 online People's Panel members. A non-member version of the survey was also made available through the Hull City Council website and promoted on social media.

Response Rate

Method	Count	%
Member (All Online)	1410	93%
Non-Member	105	7%
Total	1515	

Local Authority Residence	Count	%
Hull	1276	84%
East Riding	201	13%
Not Hull or East Riding	4	<1%
No Postcode Provided	34	2%
Total	1515	

1,276 responses came from residents with a Hull postcode.

There are an estimated 213,538 residents of Hull aged 16 +.

This means that any figures reported for Hull have a confidence interval of 2.74% at a 95% confidence level (i.e., we are 95% certain that the actual result falls within +/-2.74 percentage points of the reported figure).

This is within both corporate and industry standards.

Demographics and Weighting

The demographics of respondents from Hull are given below.

Survey responses from Hull are weighted to be demographically representative of the whole Hull population. Responses are weighted based on age, gender, ethnicity and LLTI (impairment or illness). Total weights are capped at 4.0 to avoid individual's responses carrying too much weight in the analysis.

Total		Sample (1276)		Hull Pop	Weighted Sample
Gender	Female (inc. MTF)	619	48.7%	50.3%	49.6%
	Male (inc. FTM)	650	51.1%	49.7%	49.8%
	Other / non-binary	4	0.3%	-	0.6%
LLTI (impairment or illness)	No	834	65.7%	76.7%	74.8%
	Yes	436	34.3%	23.3%	25.2%
Age group	16-34	67	5.4%	33.8%	24.5%
	35-44	125	10.0%	16.3%	18.4%
	45-54	205	16.4%	15.7%	18.7%
	55-64	329	26.3%	15.1%	16.9%
	65-74	369	29.5%	11.1%	12.5%
	75+	154	12.3%	8.2%	9.0%
Ethnic group	BAME (Black, Asian and Minority Ethnicities inc. White Other)	41	3.2%	9.8%	7.5%
	White British	1226	96.8%	90.2%	92.5%

Responses are not weighted geographically, and ward level results are not produced. Ward level results are not produced because to do so requires a sample of approx. 1000 *per ward*, for confidence intervals to be meaningful at ward level.

Average Score Analysis:

A number of the questions in this panel survey asked respondents to state how much they disagree / agree with a statement, or how dissatisfied / satisfied they are with certain things.

This report includes, as standard, the proportion of respondents who disagree / agree or who are dissatisfied / satisfied. However, it also provides an "Average Score" measure for each aspect of these questions.

This is done by assigning a numerical value to each response category (see below) and then calculating an average value across all respondents.

Strongly Disagree	Very Dissatisfied	-2
Disagree	Dissatisfied	-1
Neither	Neither	0
Agree	Satisfied	+1
Strongly Agree	Very Satisfied	+2

Negative Average Scores suggest that respondents are more likely to disagree / be dissatisfied; with values closer to -2 suggesting they disagree more strongly / are more dissatisfied.

Conversely, positive Average Scores suggest that respondents are more likely to agree / be satisfied; with values closer to +2 suggesting they agree more strongly / are more satisfied.

Executive Summary

Happiness and Wellbeing

Respondents are significantly more likely to rate different aspects of their health and wellbeing positively rather than negatively.

The only exception is feelings of stress / anxiety, where a slightly larger proportion of respondents say they do feel stressed or anxious (38%) than say they do not feel stressed or anxious (32%).

Feelings of happiness (53%) remain significantly lower than pre pandemic levels (65%) and have changed very little since the start of the pandemic.

Feelings of healthiness are now at their lowest recorded level (40%); with a significant decrease in feelings of healthiness occurring over the Xmas and New Year period (-9 percentage points).

Loneliness peaked during the pandemic (26%), but current levels (20%) are now below pre pandemic levels (23%).

Similarly, levels of stress / anxiety peaked during the pandemic (41%), and whilst current levels (38%) are more consistent with pre pandemic levels (36%), there was a significant increase in levels of stress / anxiety over the Xmas and New Year period (+7 percentage points).

Personal Finances

Your Current Financial Situation

Around a third of respondents save money regularly (40%), have money left over when they have paid all their bills (38%), are very good at managing their money (36%) and have enough money to afford their lifestyle comfortably (32%).

Conversely, 14% of respondents are in debt, 13% worry about the money they owe and 11% are struggling to pay bills.

Over the last year there has been:

- A 13-percentage point decrease in the proportion of respondents who have money left over when they have paid all their bills.
- A 10-percentage point decrease in the proportion of respondents who have enough money to afford their lifestyle comfortably.

A third of respondents live to a very strict budget (32%). Over the last year there has been a four-percentage point increase in this figure.

The majority of respondents (77%) are either keeping up without any difficulties (37%) or only struggling occasionally (40%).

20% find it a constant struggle to keep up (14%), are falling behind financially (3%) or are having real financial problems (3%).

Financial Stability Checker

Over the Xmas and New Year period:

- There has been a 4-percentage point fall in the proportion of respondents who are keeping up with bills / credit commitments without any difficulties.
- Conversely, there has been a 5-percentage point increase in the proportion of respondents who are keeping up with bills / credit commitments, but it is a struggle from time to time.

Longer term, compared to March 2022, when the People's Panel began tracing this information:

- There has been an 8-percentage point fall in the proportion of respondents who are keeping up with bills / credit commitments without any difficulties
- Conversely, there has been a 7-percentage point increase in the proportion of respondents who are keeping up with bills / credit commitments, but it is a struggle from time to time, to the highest level recorded.

Just 5% of respondents in receipt of Universal Credit say they are keeping up with bills / credit commitments without any difficulties, compared to 37% overall. Instead they are significantly more likely than average to be keeping up but finding it a constant struggle (33%) or falling behind with some bills / credit commitments (12%).

Unsurprisingly, respondents who live in households with a household income of less than £15,000 are significantly less likely than average to say they are keeping up with bills / credit commitments without any difficulties (20%). They are significantly more likely than average to be finding it a constant struggle (23%) to be falling behind with some bills / commitments (9%), or to be having real financial problems (9%).

The Previous Year

Two thirds of respondents (66%) believe that their household's financial situation has got worse in the last year. This compares to just 9% of respondents who believe that their household's financial situation has got better in the last year.

Over the last year, where applicable, the majority of respondents have made cuts to non-essentials / luxuries (80%), energy and utilities (74%), food (70%), household essentials (64%), travel (62%) and / or memberships / subscriptions (60%) costs.

Of the 73% of respondents who have made cuts to energy and utilities over the last year, the majority have reduced their heating use (96%), reduced their lighting use (77%), made sure household appliances are turned off when not in use (74%), reduced their oven use (64%) and / or reduced their washing machine / tumble dryer use (57%)

Furthermore, of the 70% of respondents who have reduced their heating use over the last year, the majority have worn more layers / used blankets (85%), reduced the time their heating is on (80%), reduced the temperature on their thermostat (77%), closed doors (64%) and / or only put their heating on when feeling cold (56%).

Of the 70% of respondents who have made some cuts to food use over the last year, the majority have bought cheaper groceries (86%), eaten out less / had less takeaways (74%) and / or created less food waste / used leftovers (52%).

Finally, of the 61% of respondents who have made cuts to travel / vehicle costs over the last year, the majority have used a car / van / motorcycle less (64%) and / or walked or cycled more (54%).

At present, 70% of respondents are struggling to afford at least one of the key costs listed in the survey. In particular, respondents are most likely to be struggling to afford energy and utilities (49%). This is followed by food (24%) and non-essentials / luxuries (22%).

The largest proportion of respondent's state that in a sudden financial emergency, where they needed £500 quickly, they would use their savings (40%). This figure is consistent with the earlier result which suggests that 40% of respondents regularly save money. It is also broadly similar to the figure from March 2022 when this question was last asked. The other most popular responses include using a credit card (16%) and using their current account / wages (14%).

8% of respondents state that they either don't know what they would do (7%) or that they would simply ignore it (1%). The proportion of respondents who say they don't know what they would do has fallen significantly (- 5 percentage points) since March 2022

The Year Ahead

Half of respondents (50%) believe that their household's financial situation will get worse over the next year. This compares to just 15% of respondents who believe that their household's financial situation will get better over the next year.

Two thirds of respondents (66%) believe that it is likely (37%) or very likely (29%) that they will have to make further cuts in the next year. Of these, the majority expect they will have to make cuts / further cuts to energy and utilities (70%), non-essentials / luxuries (62%), and food (50%) costs.

Outdoor Sports Facilities

Note: Responses to the following questions are likely to differ significantly by respondent demographic (e.g. age, disability etc.). Some analysis by demographics, where appropriate, is included below; but a complete analysis by these characteristics will be produced as part of the Phase 2 analysis.

Three quarters of respondents (76%) never use an outdoor sports facility. The remaining quarter of respondents (24%) are split between those who use an outdoor sports facility at least once a month or more (13%) and those who use an outdoor sports facility less frequently (11%).

Two fifths of respondents (41%) state that nothing in particular would encourage them to use an outdoor sports facility in the future. Respondents are most likely to be encouraged to use an outdoor sports facility in the future:

- If it were low cost / free to use (35%)
- There were activities designed for people like them (e.g. age, gender, ability etc.) (26%)
- If the facility was in walking distance of where they live (25%)

When asked about their current participation / interest in a list of key outdoor sports, the significant majority of respondents (>80%) do not play and are not interested in any of the sports listed.

Respondents are most likely to currently play some “Other” sport not listed (11%) or football (5%). They are most likely to be interested in taking up tennis (17%), football (11%), rounders (11%) and / or netball (10%).

Respondents were then asked about their interest in specific versions of these sports aimed at particular types of participants.

Females are typically more interested in single gender versions of sports than men are. In particular, females are most interested in playing female only versions of rounders (10%), netball (10%) and / or football (9%), whilst males are most interested in playing male only versions of football specifically (8%).

Analysis reveals that the highest level of interest in sports labelled as “for older players” came from respondents aged 55 to 64. From age 65+ interest in taking part in all sports in general reduces significantly. Respondents aged 55 - 64 are most interested in playing a version of football (13%), cricket (7%), tennis (7%) and / or rounders (6%) aimed specifically at older people.

Levels of interest from respondents with an illness or impairment in sports aimed specifically at people with a disability are low across all of the sports listed. This may be because many of the panel respondents with an impairment or illness are older people, with age related impairments / illnesses, and analysis shows that interest in sport amongst older people is significantly low. This would therefore benefit from more targeted research with individuals with a range of impairments / illnesses across a range of age groups.

Finally, analysis reveals that the highest level of interest in sports labelled as “for similar ability levels” came from respondents aged between 16 – 34 and 34 - 44. Analysis also suggests that a large proportion of respondents understood “similar ability level” to mean “beginners’ level”. Both age groups are most interested in playing a version of tennis (22% and 17% respectively), rounders (15% and 14% respectively), and / or netball (11% and 10% respectively) aimed specifically at people with a similar ability level. Interest amongst 16 – 34-year-olds in playing a version of football aimed specifically at people with a similar ability level is also high (14%) but falls significantly amongst 35 – 44-year-olds (7%).

Happiness and Wellbeing

Q. How are you feeling?

	1 Not at All	2	3	4	5 - Very
Happy	3%	17%	26%	44%	9%
Healthy	5%	21%	34%	33%	7%
Lonely	28%	28%	24%	15%	5%
Anxious / Stressed	10%	22%	31%	29%	9%
Worthwhile	4%	12%	33%	36%	15%
Optimistic	4%	20%	34%	32%	10%
Hopeful	4%	18%	33%	35%	11%

Focus on positive feelings:

	Jan 2020	Apr 2020	Mar 2022	Nov 2022	Jan 2023
Happy	65%	51%	55%	53%	53%
Healthy	51%	50%	45%	49%	40%
Not Lonely	58%	50%	55%	59%	56%
Not Stressed / Anxious	36%	31%	31%	37%	32%
Worthwhile	56%	50%	46%	54%	51%
Optimistic	-	-	39%	44%	42%
Hopeful	-	-	44%	42%	46%

Focus on negative feelings:

	Jan 2020	Apr 2020	Mar 2022	Nov 2022	Jan 2023
Unhappy	14%	23%	23%	19%	20%
Unhealthy	20%	20%	21%	23%	26%
Lonely	23%	26%	19%	21%	20%
Stressed / Anxious	36%	41%	35%	31%	38%
Not worthwhile	14%	15%	16%	16%	16%
Pessimistic	-	-	23%	23%	24%
Not hopeful	-	-	16%	21%	22%

- Respondents are significantly more likely to feel positively rather than negatively.
- The only exception is feelings of stress / anxiety, where a slightly larger proportion of respondents say they do feel stressed or anxious (38%) than say they do not feel stressed or anxious (32%).
- Feelings of happiness (53%) remain significantly lower than pre pandemic levels (65%) and have changed very little since the start of the pandemic.
- Feelings of healthiness are now at their lowest recorded level (40%); with a significant decrease in feelings of healthiness occurring over the Xmas and New Year period (-9 percentage points).
- Loneliness peaked during the pandemic (26%), but current levels (20%) are now below pre pandemic levels (23%).
- Similarly, levels of stress / anxiety peaked during the pandemic (41%), and whilst current levels (38%) are more consistent with pre pandemic levels (36%), there was a significant increase in levels of stress / anxiety over the Xmas and New Year period (+7 percentage points).

Your Current Financial Situation

. Which of the following best describes you at the moment?

	Mar 2022	Jan 2023
I save money regularly	44%	40%
I have money left over when I have paid all of my bills	51%	38%
I am very good at managing money	42%	36%
I live to a very strict budget	28%	32%
I have enough money to afford my lifestyle comfortably	42%	32%
I am in debt	17%	14%
I worry about the amount of money I owe	17%	13%
I am struggling to pay bills	16%	11%
None of these	3%	3%

- Around a third of respondents save money regularly (40%), have money left over when they have paid all their bills (38%), are very good at managing their money (36%) and have enough money to afford their lifestyle comfortably (32%).
- Conversely, 14% of respondents are in debt, 13% worry about the money they owe and 11% are struggling to pay bills.
- Over the last year there has been:
 - A 13-percentage point decrease in the proportion of respondents who have money left over when they have paid all their bills.
 - A 10-percentage point decrease in the proportion of respondents who have enough money to afford their lifestyle comfortably.
- A third of respondents live to a very strict budget (32%).
- Over the last year there has been a four-percentage point increase in the proportion of respondents who live to a very strict budget.

Q. Which one of the following best describes your household?

Keeping up with bills / credit commitments without any difficulties	37%
Keeping up with bills / credit commitments, but it is a struggle from time to time	40%
Keeping up with bills / credit commitments, but it is a constant struggle	14%
Falling behind with some bills/credit commitments	3%
Having real financial problems, have fallen behind with many bills / credit commitments	3%
Don't have any bills / credit commitments	1%
I don't know / prefer not to say	2%

- The majority of respondents (77%) are either keeping up without any difficulties (37%) or only struggling occasionally (40%).
- 20% find it a constant struggle to keep up (14%), are falling behind financially (3%) or are having real financial problems (3%).

Financial Stability Tracker

Q. Which of the following best describes how your household is managing?

	Mar 2022	May 2022	Jul 2022	Aug 2022	Oct 2022	Nov 2022	Jan 2023	Change from March 22
Keeping up with bills / credit commitments without any difficulties	45%	43%	42%	36%	40%	41%	37%	- 8pp
Keeping up with bills / credit commitments, but it is a struggle from time to time	33%	37%	32%	38%	39%	35%	40%	+ 7pp
Keeping up with bills / credit commitments, but it is a constant struggle	10%	10%	13%	14%	14%	14%	14%	+ 4pp
Falling behind with some bills / credit commitments	3%	3%	4%	5%	3%	3%	3%	-
Having real financial problems, have fallen behind with many bills / credit commitments	3%	2%	1%	1%	1%	2%	3%	-
Don't have any bills / credit commitments	2%	1%	1%	2%	1%	1%	1%	- 1pp

- Over the Xmas and New Year period:
 - There has been a 4-percentage point fall in the proportion of respondents who are keeping up with bills / credit commitments without any difficulties.
 - Conversely, there has been a 5-percentage point increase in the proportion of respondents who are keeping up with bills / credit commitments, but it is a struggle from time to time.
- Longer term, compared to March 2022, when the People's Panel began tracing this information:
 - There has been an 8-percentage point fall in the proportion of respondents who are keeping up with bills / credit commitments without any difficulties
 - Conversely, there has been a 7-percentage point increase in the proportion of respondents who are keeping up with bills / credit commitments, but it is a struggle from time to time, to the highest level recorded,
 - There has also been a 4-percentage point increase in the proportion of respondents who are keeping up with bills / credit commitments, but it is a constant struggle.

	Total	Universal Credit	Pension Credit	Working Tax Credit	Pension	None of These
Keeping up with bills / credit commitments without any difficulties	37%	5%	37%	28%	53%	37%
Keeping up with bills / credit commitments, but it is a struggle from time to time	40%	44%	20%	39%	29%	43%
Keeping up with bills / credit commitments, but it is a constant struggle	14%	33%	11%	20%	11%	12%
Falling behind with some bills / credit commitments	3%	12%	14%	0%	2%	3%
Having real financial problems, have fallen behind with many bills / credit commitments	3%	6%	4%	10%	0%	3%
Don't have any bills / credit commitments	1%	0%	6%	0%	1%	0%
Don't know / prefer not to say	2%	1%	8%	3%	2%	3%

	Total	< £15,000	£15,000 - £29,999	£30,000 - £44,999	£45,000 - £69,999	Over £70,000
Keeping up with bills / credit commitments without any difficulties	37%	20%	32%	39%	50%	57%
Keeping up with bills / credit commitments, but it is a struggle from time to time	40%	36%	41%	43%	40%	43%
Keeping up with bills / credit commitments, but it is a constant struggle	14%	23%	17%	15%	4%	0%
Falling behind with some bills / credit commitments	3%	9%	4%	1%	2%	0%
Having real financial problems, have fallen behind with many bills / credit commitments	3%	9%	2%	1%	2%	0%
Don't have any bills / credit commitments	1%	2%	0%	1%	0%	0%
Don't know / prefer not to say	2%	2%	4%	0%	2%	0%

- Just 5% of respondents in receipt of Universal Credit say they are keeping up with bills / credit commitments without any difficulties, compared to 37% overall.
- Instead they are significantly more likely than average to be keeping up but finding it a constant struggle (33%) or falling behind with some bills / credit commitments (12%).
- Those on Pension Credit are also significantly more likely than average to be falling behind with some bills / credit commitments (14%).
- Conversely, those respondents in receipt of a pension are significantly more likely than average to say they are keeping up with bills / credit commitments without any difficulties (53%) and significantly less likely than average to be struggling from time to time (29%).
- Unsurprisingly, respondents who live in households with a household income of less than £15,000 are significantly less likely than average to say they are keeping up with bills / credit commitments without any difficulties (20%).
- They are significantly more likely than average to be finding it a constant struggle (23%) to be falling behind with some bills / commitments (9%), or to be having real financial problems (9%).
- The converse is true of respondents with a household income of £45,000 or higher.

The Previous Year

Q. How do you think your household's financial situation has changed in the last year?

Got worse	66%
No change	24%
Got better	9%

- Two thirds of respondents (66%) believe that their household's financial situation has got worse in the last year.
- A quarter of respondents (24%) believe that their household's financial situation has not changed in the last year.
- Just 9% of respondents believe that their household's financial situation has got better in the last year.

Q. Over the last year, have you had to make cuts to any of the following, due to your personal financial situation?

	No, I have made no cuts over the last year	Yes, I have made small cuts in the last year	Yes, I have made significant cuts in the last year	N/A
Rent / mortgage	60%	6%	3%	31%
Energy and utilities	25%	50%	23%	3%
Technology services	53%	33%	11%	2%
Memberships / subscriptions	34%	31%	21%	14%
Food	30%	54%	16%	0%
Travel	36%	39%	19%	7%
Vehicle running costs	43%	28%	11%	19%
Loan / debt repayment	34%	12%	6%	48%
School / college costs	23%	8%	3%	66%
Household essentials	35%	47%	16%	2%
Non-essentials / luxuries	19%	36%	40%	5%

N/A Responses Removed

	No, I have made no cuts over the last year	Yes, I have made small cuts in the last year	Yes, I have made significant cuts in the last year
Rent / mortgage	87%	9%	4%
Energy and utilities	25%	51%	23%
Technology services	54%	34%	12%
Memberships / subscriptions	40%	36%	24%
Food	30%	54%	16%
Travel	38%	42%	20%
Vehicle running costs	53%	34%	13%
Loan / debt repayment	65%	24%	12%
School / college costs	67%	24%	9%
Household essentials	36%	48%	16%
Non-essentials / luxuries	20%	38%	42%

- Where applicable, respondents are most likely to have made cuts to:
 - Non-essentials / luxuries (80%)
 - Energy and utilities (74%)
 - Food (70%)
 - Household essentials (64%)
 - Travel (62%)
 - Memberships / subscriptions (60%)
- Where applicable, respondents are most likely to have made significant cuts to:
 - Non-essentials / luxuries (42%)
- Where applicable, respondents are least likely to have made cuts to:
 - Loan / debt repayments (36%)
 - School / college costs (33%)
 - Rent / mortgage payments (13%)

Cuts to Energy and Utilities:

Q. You said that you have made some cuts to energy and utilities over the last year. Which of the following have you done?

	% of those who have made cuts to energy / utilities in last year	% of all respondents
Reduced heating use	96%	69%
Reduced lighting use	77%	56%
Made sure household appliances are turned off when not in use	74%	54%
Reduced oven use	64%	46%
Reduced washing machine / tumble dryer use	57%	42%
Used less hot water	46%	33%
Used less water overall	37%	27%
Reduced kettle use	36%	26%
Reduced TV or games console usage	24%	17%
Reduced use of other electrical / gas devices	20%	15%
Other	1%	1%

- Of the 73% of respondents who have made cuts to energy and utilities over the last year, the majority have:
 - Reduced heating use (96%)
 - Reduced lighting use (77%)
 - Made sure household appliances are turned off when not in use (74%)
 - Reduced oven use (64%)
 - Reduced washing machine / tumble dryer use (57%)

Q. You said that you have reduced your heating usage to, in which of the following ways have you done this?

	% of those who have reduced heating use	% of all respondents
Wearing more layers / using blankets	85%	59%
Reducing time heating is on	80%	55%
Reducing the temperature on thermostat	77%	53%
Closing doors	64%	44%
Only putting the heating on when you feel cold	56%	39%
Using / heating fewer rooms in the house	39%	27%
Using hot water bottle instead	25%	17%
Using portable electric heaters / electric blankets instead	20%	14%
Not using heating at all	14%	10%
Using a log burner / open fire instead	8%	6%
Other	3%	2%

- Of the 70% of respondents who have reduced heating use over the last year, the majority have:
 - Worn more layers / used blankets (85%)
 - Reduced time heating is on (80%)
 - Reduced the temperature on the thermostat (77%)
 - Closed doors (64%)
 - Only put heating on when feeling cold (56%)

Cuts to Food:

Q. You said you have made some cuts to food over the last year. Which of the following have you done?

	% of those who have made cuts to food in last year	% of all respondents
Bought cheaper groceries (e.g. cheaper brands / own brands)	86%	60%
Eaten out less / had less takeaways	74%	51%
Created less food waste / used leftovers	52%	36%
Bought less food / eaten less	43%	30%
Bought food in bulk	24%	17%
Other	3%	2%

- Of the 70% of respondents who have made some cuts to food use over the last year, the majority have:
 - Bought cheaper groceries (86%)
 - Eaten out less / had less takeaways (74%)
 - Created less food waste / used leftovers (52%)

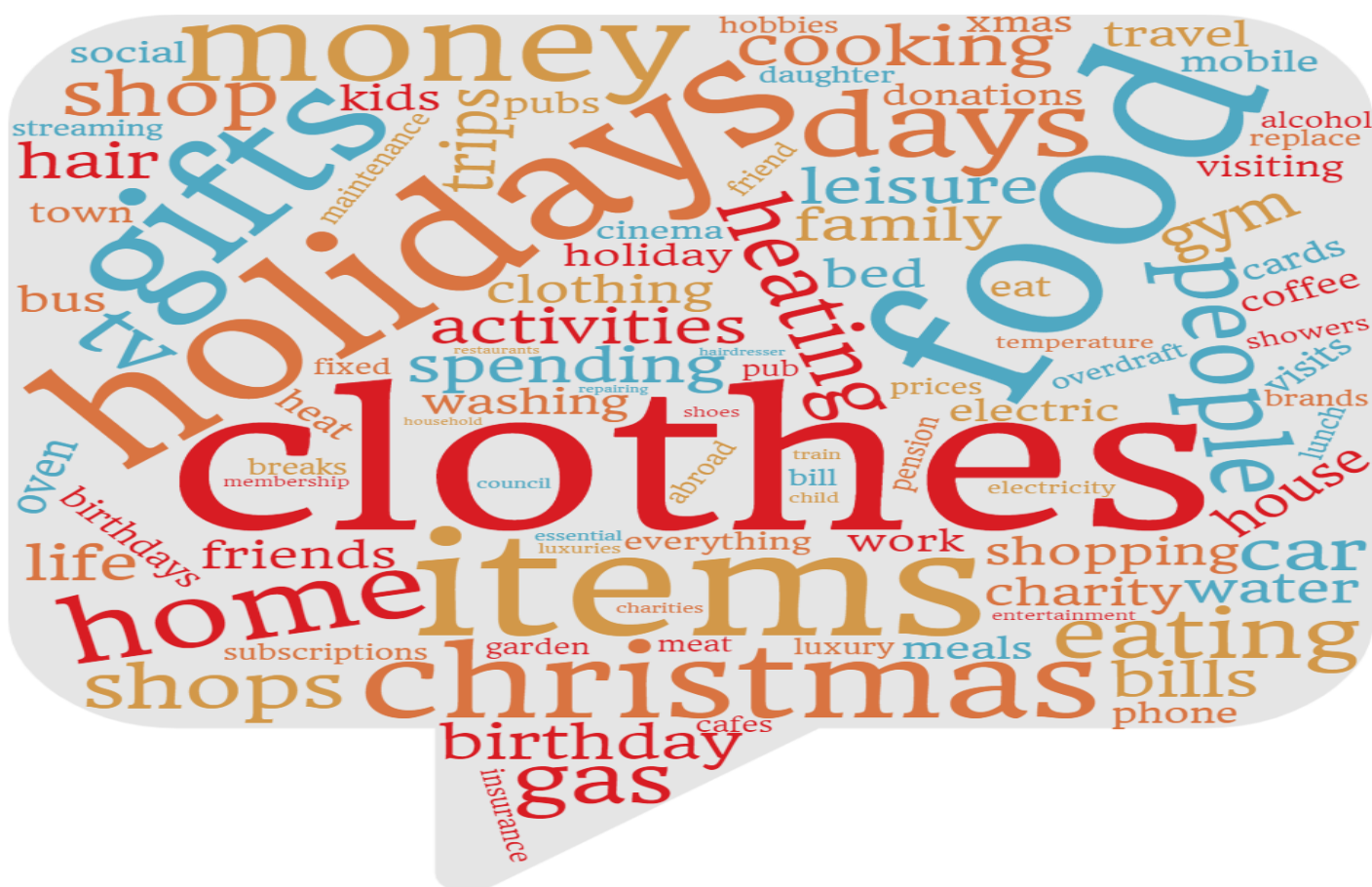
Cuts to Travel / Food Costs:

Q. You said you have made some cuts to travel / vehicle costs over the last year. Which of the following have you done?

	% of those who have made cuts to travel / vehicle costs in last year	% of all respondents
Use car / van / motorcycle less	64%	39%
Walked or cycled more	54%	33%
Held off getting repairs / servicing	21%	13%
Reduced taxi usage	18%	11%
Switched to public transport	13%	8%
Changed insurance (e.g. to third-party)	8%	5%
Changed car / van / motorcycle for one cheaper to run	7%	4%
Changed public transport type (e.g. from train to bus)	6%	3%
Other	6%	3%

- Of the 61% of respondents who have made cuts to travel / vehicle costs over the last year, the majority have:
 - Used a car / van / motorcycle less (64%)
 - Walked or cycled more (54%)

Q. Are there any other areas where you have made cuts?



Q. Which of the following are you struggling the most to afford?

Energy and utilities	49%
Not struggling with anything	30%
Food	24%
Non-essentials / luxuries	22%
Vehicle running costs	16%
Travel	12%
Rent / mortgage	11%
Loan / debt repayment	9%
Technology services	6%
Household essentials	6%
Memberships / subscriptions	5%
School / college costs	3%
Other	2%

- At present, 70% of respondents are struggling to afford at least one of the things listed.
- Respondents are most likely to be struggling to afford energy and utilities (49%).
- This is followed by food (24%) and non-essentials / luxuries (22%).

Q. Imagine your household had a sudden financial emergency and you needed £500 quickly - for example, your car needed repairing, or an unexpected bill arrived. What are you most likely to do?

	Mar 2022	Jan 2023
Pay it out of my savings	42%	40%
Use a credit card to pay for it	18%	19%
Pay for out of my current account / wages	14%	17%
Borrow from friends or family	8%	8%
Don't know what I would do	12%	7%
Arrange to pay off over time	4%	6%
Ignore it	0%	1%
Get a short-term loan	1%	1%
Get another type of loan	1%	1%
Other	1%	1%

- The largest proportion of respondent's state that in a sudden financial emergency, where they needed £500 quickly, they would use their savings (40%).
- This figure is consistent with the earlier result which suggests that 40% of respondents regularly save money.
- It is also broadly similar to the figure from March 2022.
- The other most popular responses include using a credit card (16%) and using their current account / wages (14%).
- 8% of respondents state that they either don't know what they would do (7%) or that they would simply ignore it (1%).
- The proportion of respondents who say they don't know what they would do has fallen significantly (- 5 percentage points) since March 2022.

The Year Ahead

Q. Thinking ahead to this time next year, how do you think your financial situation will change compared to now?

Get worse	50%
No change	35%
Get better	15%

- Half of respondents (50%) believe that their household's financial situation will get worse over the next year.
- A third of respondents (35%) believe that their household's financial situation will not change over the next year.
- Just 15% of respondents believe that their household's financial situation will get better over the next year.

Q. Over the next year, how likely is it that you will have to make cuts / further cuts to the amount you spend / use?

Very unlikely	6%
Unlikely	17%
Likely	37%
Very likely	29%
Don't know / not sure	11%

- Two thirds of respondents (66%) believe that it is likely (37%) or very likely (29%) that they will have to make further cuts in the next year.
- Conversely, a quarter of respondents (24%) believe that it is unlikely (17%) or very unlikely (6%) that they will have to make further cuts in the next year.
- 11% of respondents don't know / are not sure if they will have to make further cuts in the next year.

Q. If you said that making cuts / further cuts is likely or very likely, where do you think you will need to make cuts / further cuts?

	% of those who said cuts / further cuts are likely / very likely	% of all respondents
Energy and utilities	70%	46%
Non-essentials / luxuries	62%	40%
Food	50%	33%
Memberships / subscriptions	42%	28%
Household essentials	40%	26%
Travel	35%	23%
Technology services	34%	22%
Vehicle running costs	25%	16%
Loan / debt repayment	9%	6%
Rent / mortgage	7%	5%
School / college costs	6%	4%
Other	2%	1%

- Of the 66% of respondents who believe that it is likely or very likely that they will have to make further cuts in the next year, the majority expect to make cuts to:
 - Energy and utilities (70%)
 - Non-essentials / luxuries (62%)
- High proportion also expect to make cuts to:
 - Food (50%)
 - Memberships / subscriptions (42%)
 - Household essentials (40%)
 - Travel (35%)
 - Technology services (34%)

Outdoor Sports Facilities

Q. How often do you use an outdoor sports facility?

Weekly	8%
More than monthly	2%
At least monthly	3%
A few times a year	4%
Less often	8%
Never use	76%

- Three quarters of respondents (76%) never use an outdoor sports facility.
- The remaining quarter of respondents (24%) are split between those who use an outdoor sports facility at least once a month or more (13%) and those who use an outdoor sports facility less frequently (11%).
- **Responses to this question are likely to differ significantly by respondent demographic (e.g. age, disability etc.). A complete analysis by these characteristics will be produced as part of the Phase 2 analysis.**

Q. Which outdoor sports facility / facilities do you use?



Q. What would encourage you to use outdoor sports facilities in the future?

Nothing in particular would encourage me	41%
Low cost / free to use	35%
Activities designed for people like me (e.g. age, gender, ability etc.)	26%
Being in walking distance of where I live	25%
Sessions being available when I am free to take part	19%
Drop-in sessions (no booking)	18%
Parking availability	14%
Being able to take a friend / friends	13%
Opportunity to meet new people	13%
Friendly, non-competitive games	13%
Activities designed for people who are less active / able	13%
On a bus route	11%
Activities with a focus on losing weight	11%
Having staff on-site (e.g. a coach, referee or organiser) on-site	10%
Multi-sport activities (e.g different sports within a session)	8%
Provision of equipment at the facility	8%
Formal / organised competitive games (eg. league / teams etc.)	5%
Being able to book out the full facility for my group	4%
Crèche / caring facilities	4%
Other	4%
Help with transport	2%

- Two fifths of respondents (41%) state that nothing in particular would encourage them to use an outdoor sports facility in the future.
- Respondents are most likely to be encouraged to use an outdoor sports facility in the future:
 - If it were low cost / free to use (35%)
 - There were activities designed for people like them (e.g. age, gender, ability etc.) (26%)
 - If the facility was in walking distance of where they live (25%)

Q. Which of the following sports do you currently play at all and which would you like to play in the future?

	Currently play	Don't currently play but would like to in the future	Not interested
Other	11%	9%	80%
Tennis	2%	17%	81%
Football	5%	11%	84%
Rounders	<1%	11%	88%
Netball	1%	10%	89%
Cricket	1%	6%	93%
Rugby	1%	6%	93%
Basketball	<1%	6%	93%
Hockey	1%	5%	94%
Volleyball	0%	5%	94%

- The significant majority of respondents (>80%) do not play and are not interested in any of the sports listed.
- **Responses to this question are likely to differ significantly by respondent demographic (e.g. age, disability etc.). A complete analysis by these characteristics will be produced as part of the Phase 2 analysis.**
- Respondents are most likely to currently play some “Other” sport (11%) or football (5%).
- They are most likely to be interested in taking up the following in the future:
 - Tennis (17%)
 - Football (11%)
 - Rounders (11%)
 - Netball (10%)
- The lowest levels of participation / interest are in cricket, rugby, basketball, hockey and volleyball.
- Respondents who said they either currently play, or are interested in taking up, some “Other” sports were asked to provide further details.
- The most popular responses to this question were swimming, cycling, badminton, golf, running, bowls and walking.

Q. Thinking about outdoor sports, are you interested in specific versions of any of these sports?

All Respondents:

	Single gender (female)	Single gender (male)	For older players	For people with a disability	Ability level	Not interested
Football	5%	5%	8%	1%	6%	83%
Tennis	3%	2%	4%	1%	10%	84%
Rounders	5%	1%	3%	1%	8%	87%
Netball	6%	1%	3%	1%	6%	89%
Cricket	2%	2%	5%	1%	2%	91%
Rugby	1%	3%	3%	1%	2%	92%
Hockey	3%	2%	2%	<1%	4%	93%
Basketball	2%	1%	2%	<1%	4%	94%
Volleyball	2%	1%	2%	<1%	3%	94%
Other	1%	1%	2%	1%	2%	94%

Single Gender Female:

	% of females	% of all respondents
Rounders	10%	5%
Netball	10%	6%
Football	9%	5%
Hockey	5%	3%
Tennis	5%	3%
Basketball	4%	2%
Cricket	3%	2%
Volleyball	3%	2%
Rugby	2%	1%
Other	2%	1%

- 10% of females are interested in playing a female only version of at least one of the sports listed.
- Females are most interested in playing a female only version of rounders (10%), netball (10%) and football (9%),
- They are least interested in playing a female only version of cricket (3%), volleyball (3%), rugby (2%) and "Other" sports (2%).

Single Gender Male:

	% of males	% of all respondents
Football	8%	5%
Cricket	5%	2%
Rugby	5%	3%
Hockey	4%	2%
Tennis	4%	2%
Rounders	2%	1%
Basketball	2%	1%
Volleyball	2%	1%
Netball	1%	1%
Other	1%	1%

- 9% of males are interested in playing a male only version of at least one of the sports listed.
- Males are most interested in playing a male only version of football (8%).
- They are least interested in playing a male only version of rounders (2%), basketball (2%), volleyball (2%), netball (1%) and “Other” sports (1%).

For Older Players:

NB: Analysis reveals that the highest level of interest in sports labelled as “for older players” came from respondents aged 55 to 64. From age 65+ interest in taking part in all sports in general reduces significantly.

	% of respondents aged 55 - 64	% of all respondents
Football	13%	8%
Cricket	7%	5%
Tennis	7%	4%
Rounders	6%	3%
Netball	5%	3%
Volleyball	5%	2%
Other	5%	2%
Rugby	3%	3%
Basketball	3%	2%
Hockey	2%	2%

- 13% of respondents aged 55 – 64 are interested in playing a version of at least one of the sports listed aimed specifically at older people.
- Respondents aged 55 - 64 are most interested in playing a version of football (13%), cricket (7%), tennis (7%) and rounders (6%) aimed specifically at older people.
- They are least interested in playing a version of hockey (2%) aimed specifically at older people.

For People with A Disability:

	% of respondents with an impairment or illness	% of all respondents
Football	4%	1%
Rounders	3%	1%
Rugby	3%	1%
Netball	3%	1%
Tennis	3%	1%
Other	3%	1%
Cricket	2%	1%
Basketball	2%	<1%
Volleyball	2%	<1%
Hockey	1%	<1%

- 4% of respondents with an illness or impairment are interested in playing a version of at least one of the sports listed aimed specifically at people with a disability.
- Levels of interest from respondents with an illness or impairment in sports aimed specifically at people with a disability are low across all sports listed.
- This may be because many of the panel respondents with an impairment or illness are older people, with age related impairments / illnesses, and analysis shows that interest in sport amongst older people is significantly low.
- This would therefore benefit from more targeted research with individuals with a range of impairments / illnesses across a range of age groups.

Ability Level:

NB: Analysis reveals that the highest level of interest in sports labelled as “for similar ability levels” came from respondents aged between 16 – 34 and 34 - 44. **Analysis also suggests that a large proportion of respondents understood “similar ability level” to mean “beginners’ level”.**

	% of respondents aged 16 - 34	% of respondents aged 35 - 44	% of all respondents
Tennis	22%	17%	10%
Rounders	15%	14%	8%
Football	14%	7%	6%
Netball	11%	10%	6%
Hockey	9%	8%	4%
Basketball	8%	9%	4%
Volleyball	6%	7%	3%
Rugby	4%	4%	2%
Cricket	5%	2%	2%
Other	0%	6%	2%

- 22% of respondents aged 16 – 34, and 17% of respondents aged 35 – 44, are interested in playing a version of at least one of the sports listed aimed specifically at people with a similar ability level.
- In both cases they

Top 20 Most Popular Specific Versions of Sports:

Sport	Target Audience	Interest Amongst Target Audience
Tennis	Similar Ability: Aged 16 - 34	22%
Tennis	Similar Ability: Aged 35 - 44	17%
Rounders	Similar Ability: Aged 16 - 34	15%
Football	Similar Ability: Aged 16 - 34	14%
Rounders	Similar Ability: Aged 35 - 44	14%
Football	Older People: Aged 55 - 64	13%
Netball	Similar Ability: Aged 16 - 34	11%
Rounders	Females	10%
Netball	Females	10%
Netball	Similar Ability: Aged 35 - 44	10%
Football	Females	9%
Hockey	Similar Ability: Aged 16 - 34	9%
Basketball	Similar Ability: Aged 35 - 44	9%
Football	Males	8%
Basketball	Similar Ability: Aged 16 - 34	8%
Hockey	Similar Ability: Aged 35 - 44	8%
Cricket	Older People Aged 55 - 65	7%
Tennis	Older People Aged 55 - 66	7%
Football	Similar Ability: Aged 35 - 44	7%
Volleyball	Similar Ability: Aged 35 - 44	7%