The M&S Family Matters Index,
February 2022

FAMILY MATTERS

M&S AND FAMILIES

THE M&S FAMILY MATTERS INDEX

The M&S Family Matters Index helps us to understand the priorities, challenges and ambitions of families across the UK.

Conducted on a quarterly basis, this latest version provides a detailed picture of what matters to families as we begin a new year. From growing health concerns to a strong appetite for lifestyle changes and an ongoing focus on sustainability, our latest index takes a closer look at how different age groups and regions are affected.

In this report we will explore the following three core themes which emerged from our qualitative and quantitative research:

EXECUTIVE SUMMARY

The M&S Family Matters Index provides an overall measure of how confident and resilient families across the UK are feeling and how those feelings change in the months and years ahead.

The index is generated using data from interviews with 5,000 adults from across the UK in November 2021. It also draws on comparative data from an initial nationally representative survey of 10,000 people in May 2021, and an additional 5,000 person survey in August 2021. It is calculated based on their responses to a wide range of detailed questions exploring their happiness, optimism, financial security and future plans.

The M&S Family Matters Index tracks changing attitudes around family over time, as well as comparing how they vary from group to group – for example by generation or geography. Index scores range from 0 to 100, with 0 being the lowest, 100 the highest and 50 the mid-point. Index scores above 50 represent a positive, optimistic perspective about family situation and prospects.

The index score is a combination of different factors that define the resilience and confidence of families today: optimism about family prospects, feelings about the strength of families, happiness of families, family health and family financial prospects.

The overall Family Index score for the UK as a whole stands at 53, compared to 55 in both March and August, indicating a slight drop in the overall confidence and resilience of families across the UK.

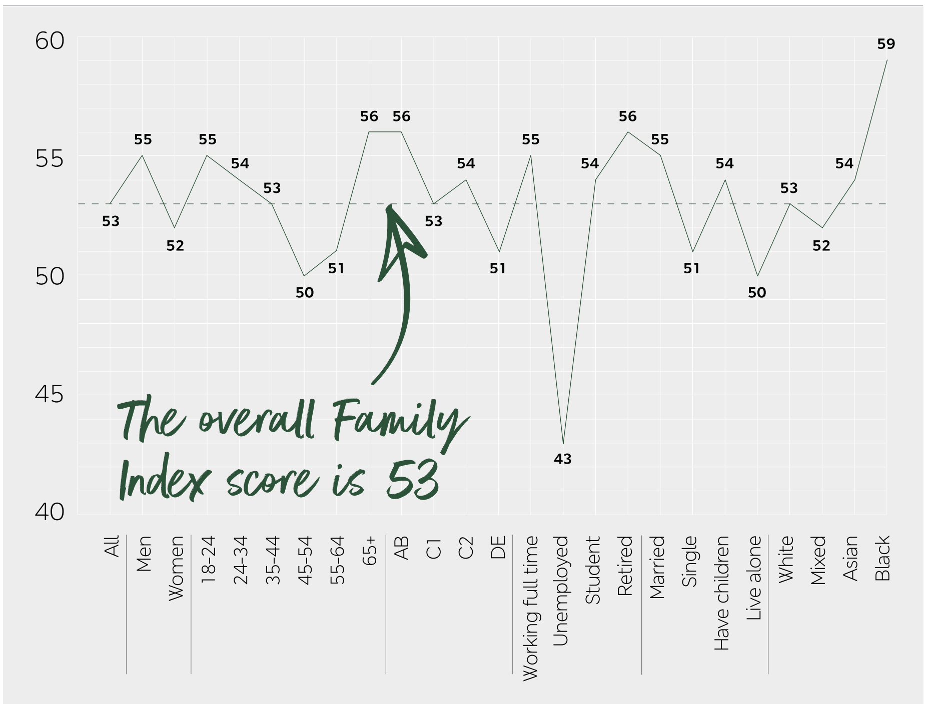
The average Family Index Score for both men (55) and women (52) is lower than the previous wave, down from 56 and 54, respectively. As in previous reports, women tend to be less optimistic overall and more concerned about societal and economic issues than men.

The lowest Family Index score (43) is once again amongst unemployed people, even lower than August's score of 45.

The only group for whom the Family Index score has improved since the previous quarter is 18–24 year olds (from 54 to 55). 55-64 year olds have seen the largest drop in their index score, from 54 to 51.

The dip in Family Index scores for most groups reflects growing pessimism about their financial outlook, with 45% (up from 37% in August) now worried about the long-term financial position of their family and 37% (up from 30% in August) worried about their family's short-term finances. Women are markedly more worried about both than men and 25-54 year olds more so than younger and older groups.

INDEX SCORES



1. Family feelings

40% are optimistic about their family's prospects over the next three months (down from **51%** in March and **47%** in August)

65% are concerned about the impact of the environment on their families

56% are concerned about their family's health, up **5%** from August

2. Lifestyle changes

51% say the pandemic has brought their family closer together & that they remain closer even with lockdown now behind us

53% of people are planning lifestyle changes in 2022

19% of those in full or part-time work say they intend to change their job or career in 2022

3. Sustainable living

60% are making an effort to educate themselves about their environmental impact as a consumer

58% say it is important that the shops they buy from are making their products as environmentally sustainable as possible

41% have already made changes to the food they buy due to climate change

1.
GROWING CONCERNS AROUND THE ENVIRONMENT AND FAMILY HEALTH

This latest index finds that the environment continues to be a top concern for families across the UK in the aftermath of COP26. Growing concerns around health and the cost of living are creating cautious optimism about the months ahead.

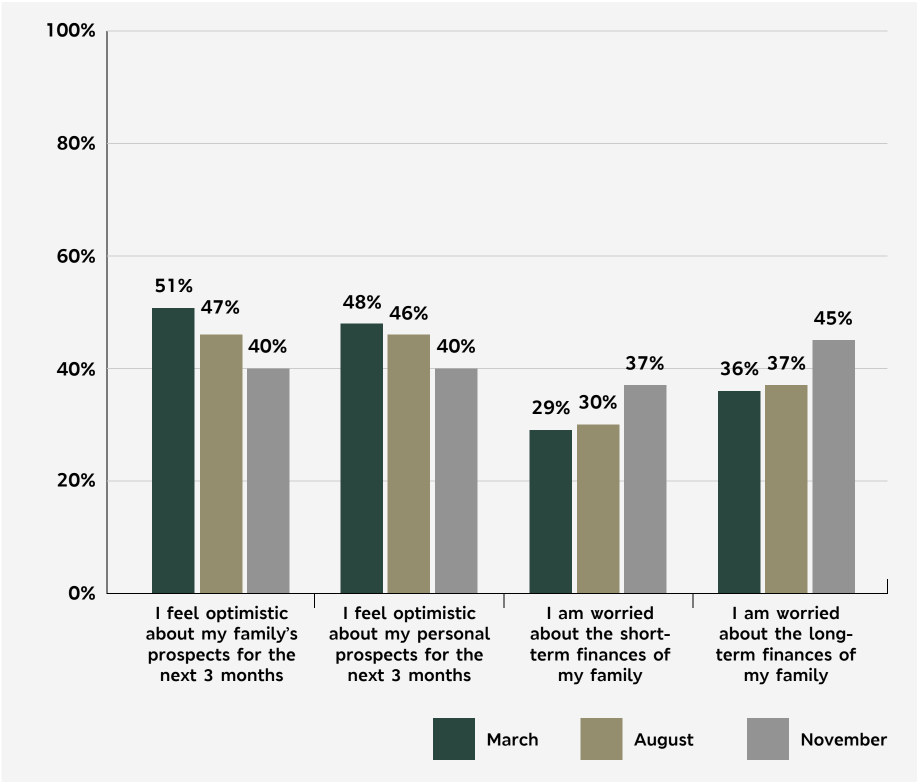
In this section, we will look at:

What has changed over the past six months?

What has changed over the past six months?

As people think ahead to the next three months and about their family's prospects, the Family Matters Index has found a clear drop-off in optimism. In the first wave of the study in March, just over half of people were optimistic about their family prospects. In the latest research, as people think about their prospects for the start of 2022, only two in five people express the same optimism.

People are specifically more worried about both their short-term (37%) and long-term (45%) family finances than they were in March and August. Women (42% and 50%, respectively) are markedly more worried than men (32% and 40%, respectively).



% of all UK adults who are concerned...	Mar 21	Aug 21	Nov 21	3-month change
I am worried about how environmental damage will affect future generations of my family	61%	64%	65%	+1%
I am worried about divisions in our country	60%	59%	62%	+3%
I am worried about inequality in society	54%	55%	58%	+3%
I am worried about the health of my family	56%	51%	56%	+5%
I am worried about my children's future job prospects	53%	48%	50%	+2%
I am concerned my children are missing out chances to develop	44%	37%	35%	-2%
I am worried about my children's education	37%	33%	31%	-2%
I am worried about my family getting nutritious food	22%	23%	25%	+2%

Broader societal concerns, for example concerns about the impact of climate change (65%), social divisions (62%) and inequality (58%), continue to prevail.

Concerns about the environment have risen marginally since the index launched but continue to be the most important to families. Over 65s (68%) are particularly anxious about the impact of climate change on future generations. However, as we enter the winter months, the proportion of people worried about the health of their family has increased the most significantly, by 5% since August.

By contrast, the return to school and an improved outlook for formal education more generally has meant that parents' worries about their children's education and chances to develop have both decreased by 2% since August.

56%
of people are worried about their family's health

65%
of people are concerned about the impact of climate change

2.
SUSTAINABLE LIVING

There are two distinct themes relating to sustainability in this wave's index. Firstly, the willingness of families to change their own personal consumption, and secondly, the responsibility that the Government and big businesses have to take the lead on tackling climate change.

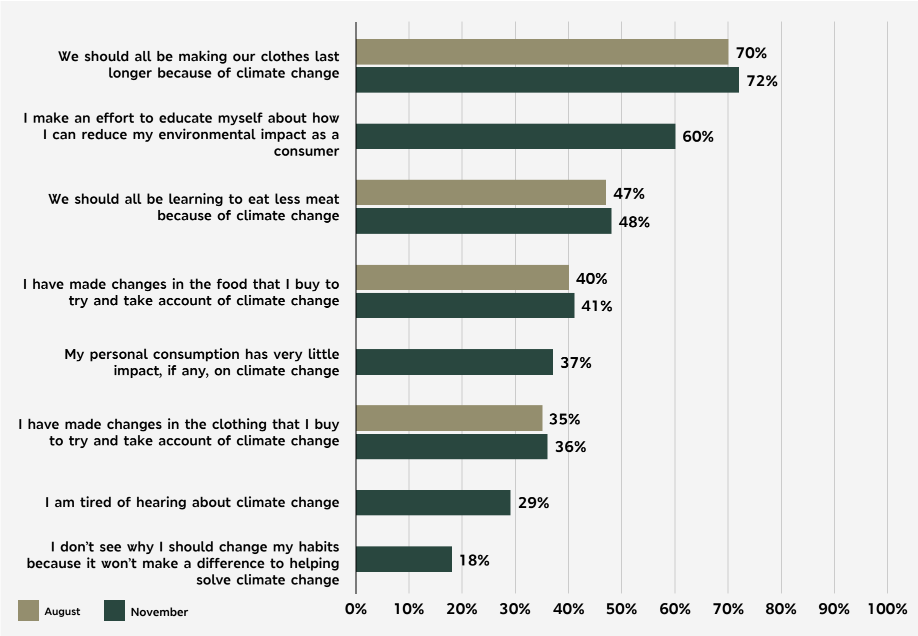
In this section we will explore:

a) Opinions on personal consumption

b) Opinions on the responsibilities of the Government and big businesses

a) Opinions on personal consumption

Views on consumption habits, such as meat consumption, clothes purchases and consideration of environmental impact where comparable, have remained the same since August. However, nearly a third of all respondents say that they are tired of hearing about climate change. Men are more likely to be of this view than women (33% vs 25%, respectively). Older respondents are also more likely to feel climate change fatigue than younger audiences (32% and 34% of 55-64 and 65+, respectively, compared to 21% and 27% of 18-24 and 25–34 year olds, respectively).

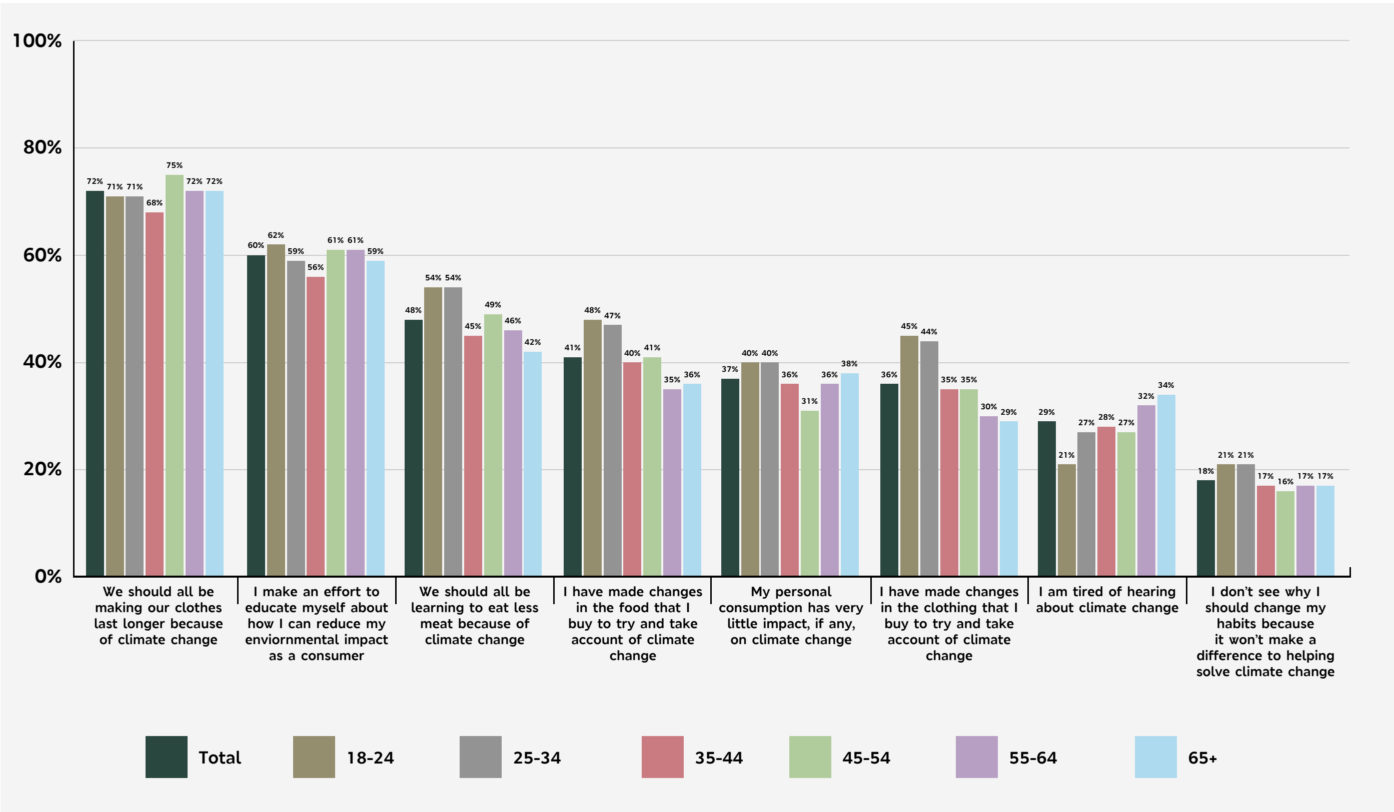


18% say that they do not see why they should change their habits because they think it would make little impact on climate change. However, this only represents a minority and is outweighed by the majority (60%) who try to educate themselves about how they can reduce their environmental impact. This is more often the case for women (64%) than men (55%).

Students and people working part-time (63%) are the two working status groups most likely to want to educate themselves further about their personal environmental impact. Although increases are minimal (1%), those who have reduced their meat consumption (48%), made changes in the food (41%) and clothing (36%) that they buy, far outnumber those who don't see why changing their habits is necessary (18%).

60%

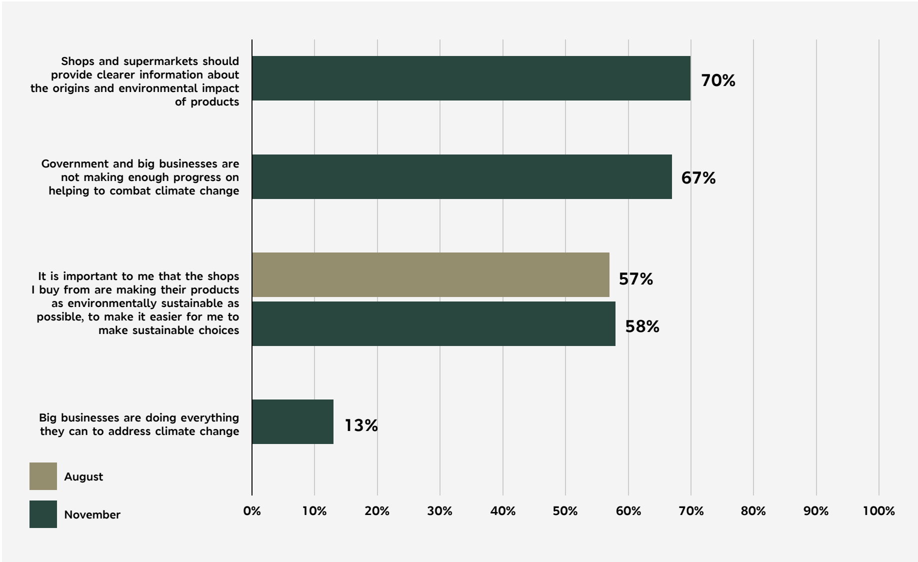
say they are learning how to reduce their environmental impact



b) Opinions on the responsibilities of the Government and big businesses

In the latest Family Matters Index, we find that very few people think that businesses are playing their part in tackling climate change, with only 13% of consumers agreeing that big businesses are doing everything they can.

Older audiences have the least faith in the efforts of big businesses. Only 9% of 55-64 year olds and 10% of those aged 65+, think that they are doing all that they can compared to 19% of 18-24 and 25-34 year olds.

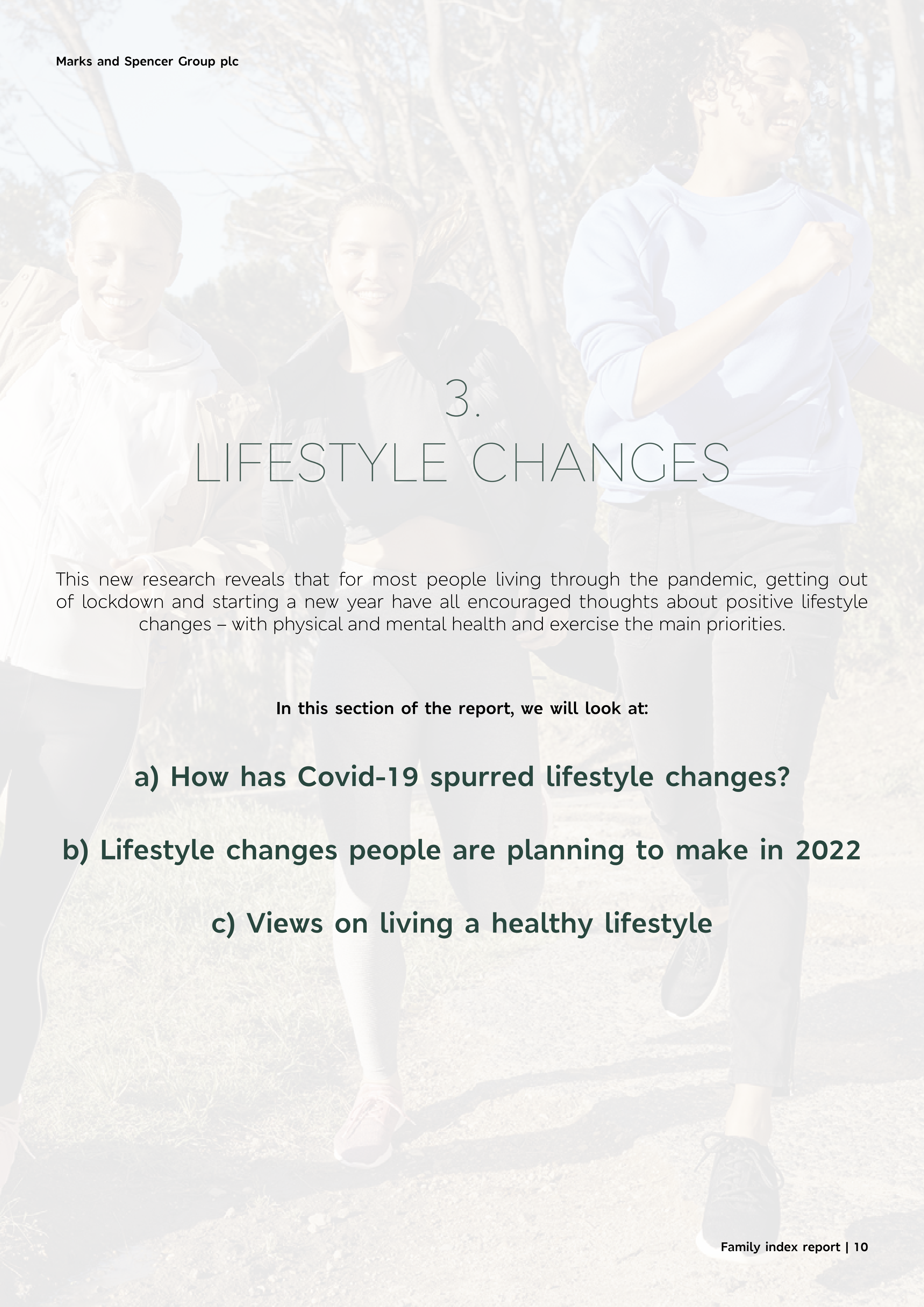


70% of people agree that shops and supermarkets should provide clearer information about the origins and environmental impact of products. Those aged 25-34 (73%) and 45-54 (73%) are most likely to take this view, and women (74%) are more likely to take this view than men (66%). Those on the highest incomes are also more likely to want this greater clarity from shops and supermarkets than those on lower incomes.

Nearly six in ten people (58%) say it is important that the shops they buy from are making their products as environmentally sustainable as possible. Those aged 18-24 (61%) are most likely to want this from the shops they buy from, whilst those aged 35-44 (54%) are least likely to consider this important to them. Women (62%) are again more likely than men (53%) to agree with this statement.

61%

of 18-24 year olds want shops to make their products as sustainable as possible



3.
LIFESTYLE CHANGES

This new research reveals that for most people living through the pandemic, getting out of lockdown and starting a new year have all encouraged thoughts about positive lifestyle changes – with physical and mental health and exercise the main priorities.

In this section of the report, we will look at:

a) How has Covid-19 spurred lifestyle changes?

b) Lifestyle changes people are planning to make in 2022

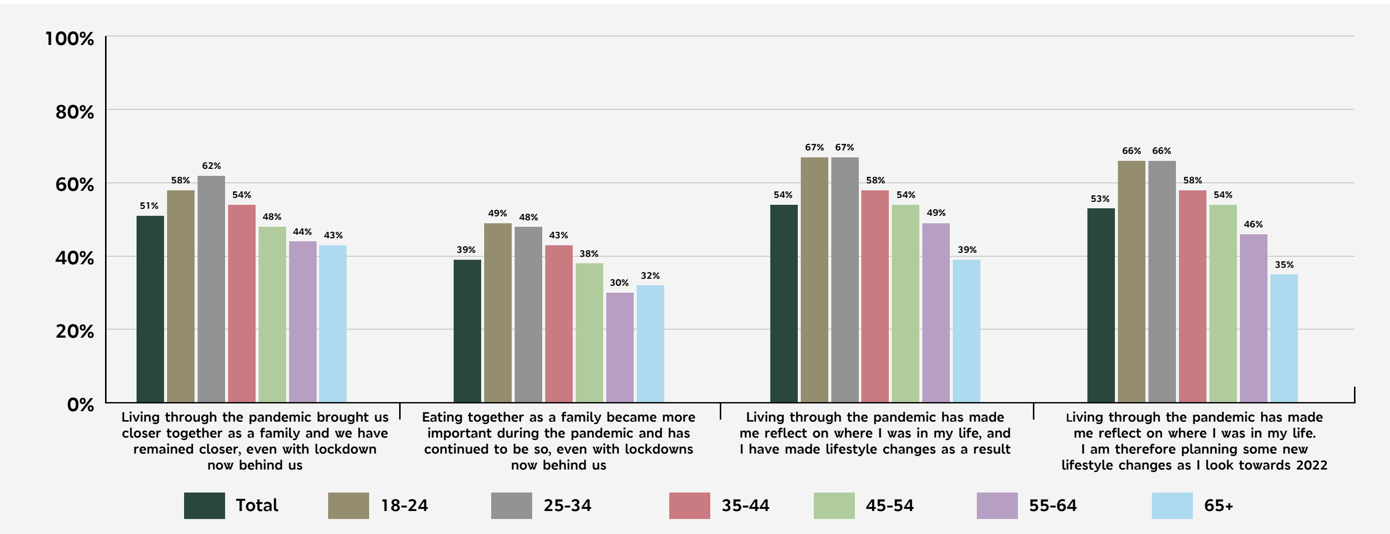
c) Views on living a healthy lifestyle

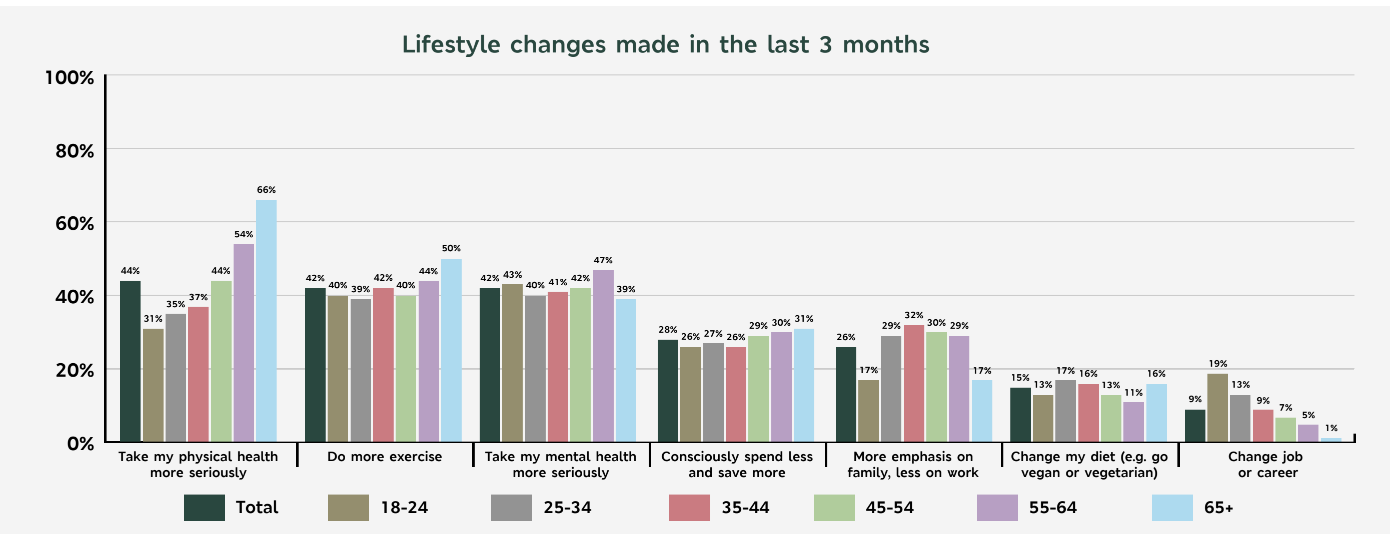
a) How has Covid-19 spurred lifestyle changes?

Over half (54%) of adults say they have made a lifestyle change in response to the pandemic. 51% overall (47% of men and 55% of women) think that living through the pandemic has brought them closer together as a family, even since Covid restrictions have been lifted. 39% of all individuals and 49% of 18-24s say that eating together as a family became more important during the pandemic and has continued to be so in the past few months. The most common changes that people have made in the last three months have been to take their physical health more seriously (44%), to do more exercise (42%) and to take their mental health more seriously (42%). The focus on physical health is particularly strong among those aged 65+, with 66% saying that they are already taking their physical health more seriously and 50% saying they are doing more exercise. Younger people, by contrast, are more likely to have changed their job or career in the three months prior to fieldwork (19% of 18-24 year olds and 13% of 25-34 year olds compared to 9% overall).

51%
think the Covid-19 pandemic has brought them closer together as a family

39%
say eating together as a family is still important





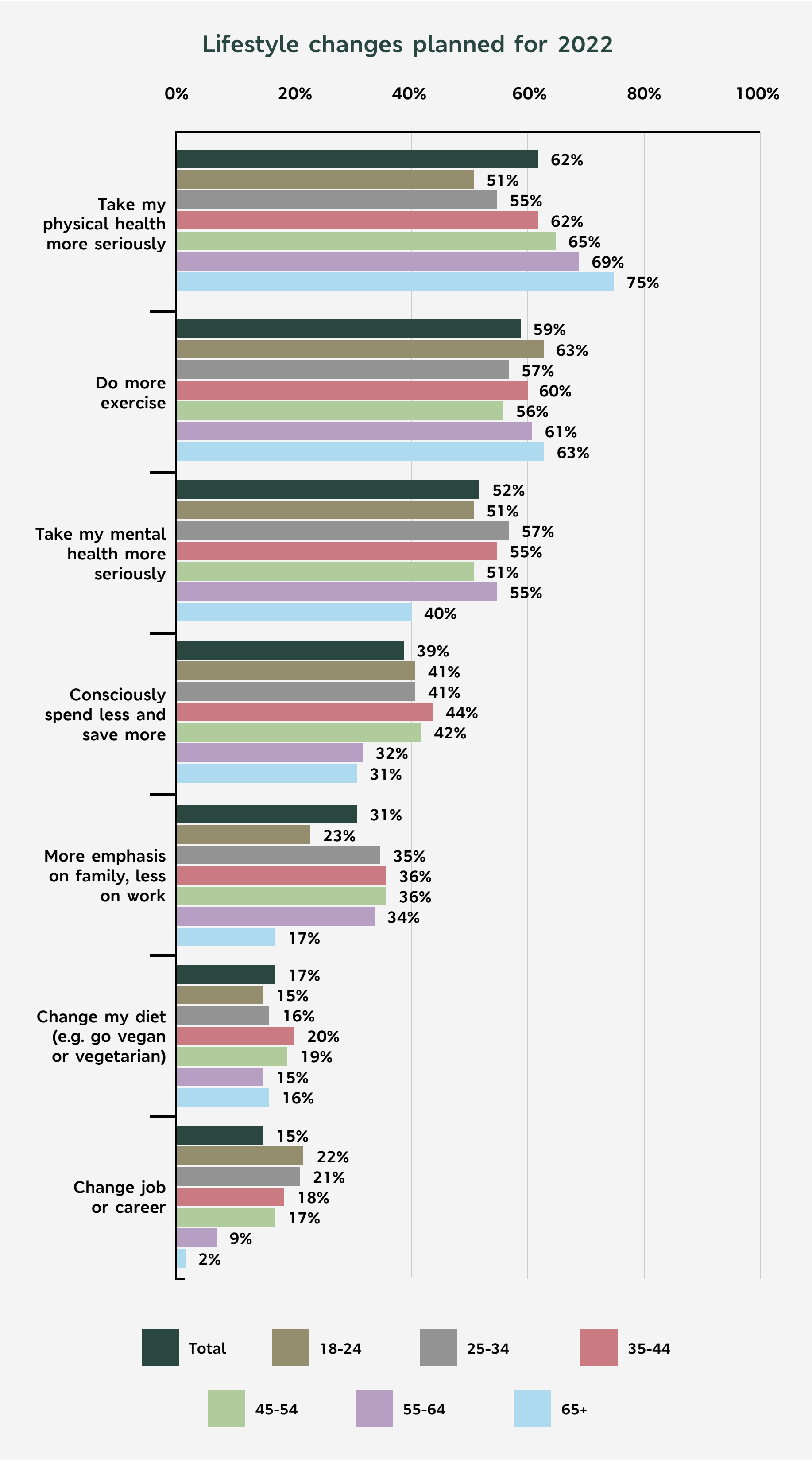
b) Lifestyle changes people are planning to make in 2022

For the 53% of people planning a lifestyle change in 2022, health is the main priority. 62% of those planning to make lifestyle changes are committed to taking their physical health more seriously, 59% are planning to do more exercise and 52% are aiming to prioritise their mental health.

Older respondents place less importance on saving than their counterparts. 31% of those aged 65+ and 32% of those aged 55-64 say that they will consciously spend less and save more in 2022, compared to 41% of 18-24 and 25-34 year olds, 44% of 35-44 year olds and 42% of 45-54 year olds. Those aged 35-44 and 45-54 are also the most likely to change their diet (i.e. go vegan or vegetarian), at 20% and 19% respectively (vs 17% overall).

Those with larger families are more likely to want to place greater emphasis on family and less on work in 2022 (28% of two-person households, compared to 39% of five-person households and 41% of households of six or more people). The highest earners – people with an annual income of £83,001 or more – are also more likely to plan to dedicate more time and attention to family and less on work (44% compared to an overall average of 31%).

Furthermore, the 'Great Resignation' looks set to continue into 2022, with nearly one in five (19%) of those in full or part-time work saying that they intend to change their job or career and 15% of people overall. Younger people are more likely to say they are planning to do so (22% of 18-24 year olds and 21% of 25-34 year olds), compared to 18% of 35-44 year olds and 17% of 45-54 year olds.



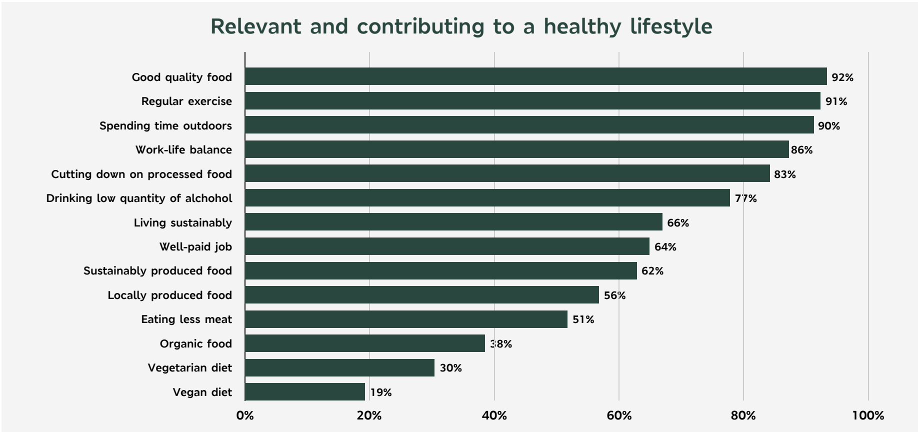
53%
of people are planning a lifestyle change in 2022

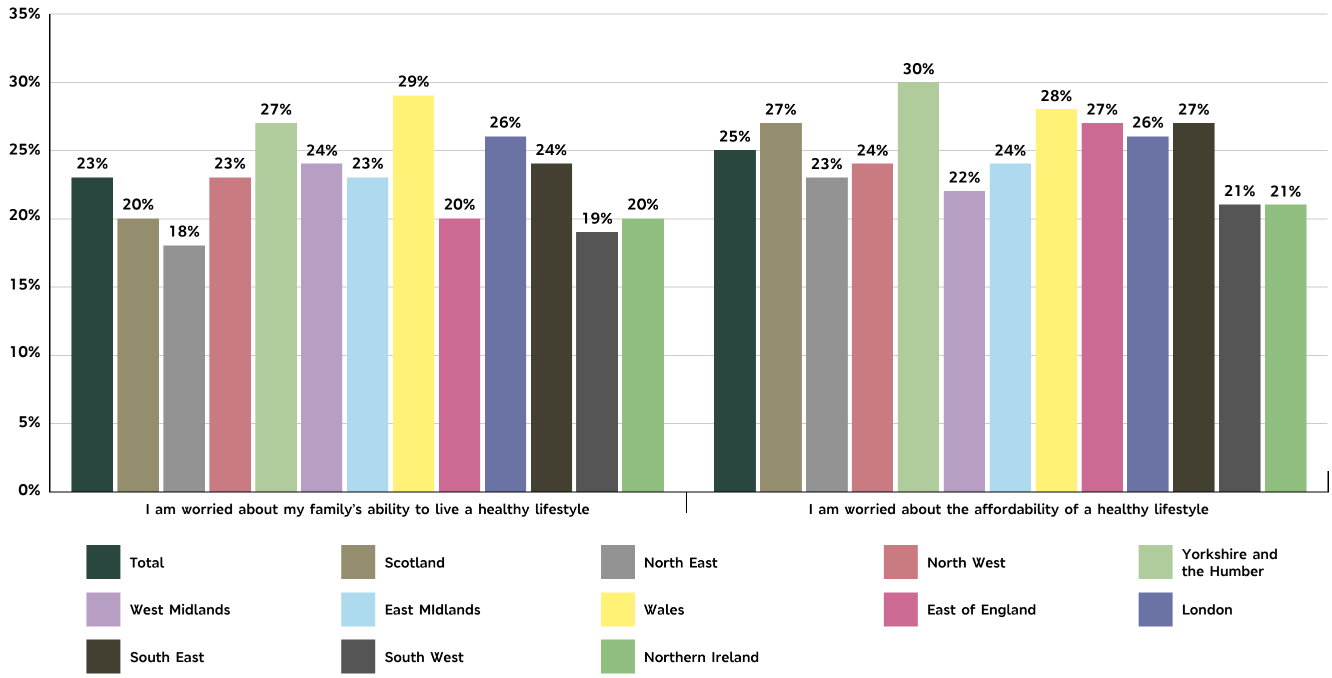
62%
want to prioritise their physical health

19%
of full and part-time workers are planning to change job or career

c) Views on living a healthy lifestyle

Two main themes arise when it comes to what constitutes a healthy lifestyle. Firstly, food and diet and, secondly, other lifestyle and attitudinal changes, such as exercise, a work-life balance and spending time outdoors. The table to the right ranks the things that people see as important for a healthy lifestyle.





One view with which nearly all people (92%) agree is that good quality food is relevant and important to a healthy lifestyle. Demonstrating quality of produce and communicating this effectively will be key in 2022. Cutting down on unhealthy items, such as processed foods (83%) and lower alcohol consumption (77%) are seen as being highly relevant. Moreover, sustainably produced (62%) and locally produced food (56%) are important and can be used as identifiers of quality produce. This is particularly the case for those aged 65+ (65% and 63%, respectively). While less than a third of people think of a vegetarian diet as relevant for a healthy lifestyle (& less than one in five think of a vegan diet in these terms), more than half (56%) think a healthy lifestyle means eating less meat.

The number one concern that most people have for their family is its health, ranking above even concerns about family finances. In that context it's significant that around one in four people are worried about the affordability (25%) and ability to live (23%) a healthy lifestyle for their family. This is of greatest concern to people from Wales (28% worried about affordability and 29% worried about their ability to live a healthy lifestyle) and Yorkshire and the Humber (30% worried about the affordability and 27% worried about their ability to live a healthy lifestyle). Residents of Northern Ireland and the South West are the least concerned about the affordability of a healthy lifestyle (both 21%) and their ability to live a healthy lifestyle (20% and 19%, respectively).

92%

agree good quality food is important for a healthy lifestyle

25%

are worried about the affordability of a healthy lifestyle

CONCLUSION

This third quarterly M&S Family Matters Index captures the changing story of how families across the UK are feeling – and the changes they are making – as we begin a new year.

Alongside welcoming 2022, we are also approaching the second anniversary of the Covid-19 pandemic, which continues to have a lasting impact on family life.

Our previous reports found that the experience of lockdown made families and family moments matter more to people. This latest wave finds that families brought closer together by the physical restrictions of lockdown have continued to feel closer than they did before, even with lockdown rules lifted.

This report also finds that living through Covid is having an ongoing impact in other ways, even as the risk of the virus itself hopefully recedes. More than half of people have either already made lifestyle changes as a direct result of the pandemic, or plan to do so as we start 2022. The focus of most of these changes is health, wellness and exercise, but the report also points to a continuing churn in the job market for many. This trend is prompted in part by high awareness of the importance of work-life balance in achieving a healthy lifestyle.

Sustainability continues to be at the forefront of people's minds. Ranking as the number one concern for most people, this unease on the behalf of future generations is matched by strong support for retailers doing more to help consumers make sustainable choices. While supportive of action by others, significant numbers of people are looking to change their own behaviour for the benefit of the environment.

All these trends are, however, against a less optimistic backdrop for families overall. Concerns are rising around family health and worries over the cost of living are beginning to grow as families consider their short-term and long-term financial prospects.

Our next quarterly M&S Family Matters Index will continue to explore these concerns, and whether stronger signs of optimism return as the year continues.

METHODOLOGY & SAMPLE

Yonder interviewed 5,013 adults online between 17th & 26th November 2021. Interviews were conducted across the UK and data weighted to be representative of the whole population. Data accurate to a margin of error of +- 1.4%. Analysis of demographic sub-groups is based on a minimum sample of 100.