The M&S Family Matters Index,
July 2022

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FAMILY MATTERS

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THE M&S FAMILY MATTERS INDEX

The M&S Family Matters Index is a continuing journey to understand the priorities, challenges and ambitions of families across the UK.

Our latest quarterly report was conducted at the end of April, as families looked ahead to a summer without Covid-19 restrictions. This quarter we've seen growing concerns around the cost of living and healthy eating, but families are keen to make the most of the coming months with plenty of holiday plans and a desire to live more sustainably.

In this report we will explore the following three areas of our 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. It also compares how attitudes vary from group to group – for example, by generation or geography.

The index has been generated using data from an initial nationally representative survey of 10,000 people across the UK, conducted in March 2021. It is calculated based on their responses to a wide range of detailed questions exploring families' happiness, optimism, financial security, and the strength and health of what they see as their family unit.

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 latest Family Index score for the UK, based on data collected at the end of April, has remained consistent overall since the previous index at the end of last year – at 53.

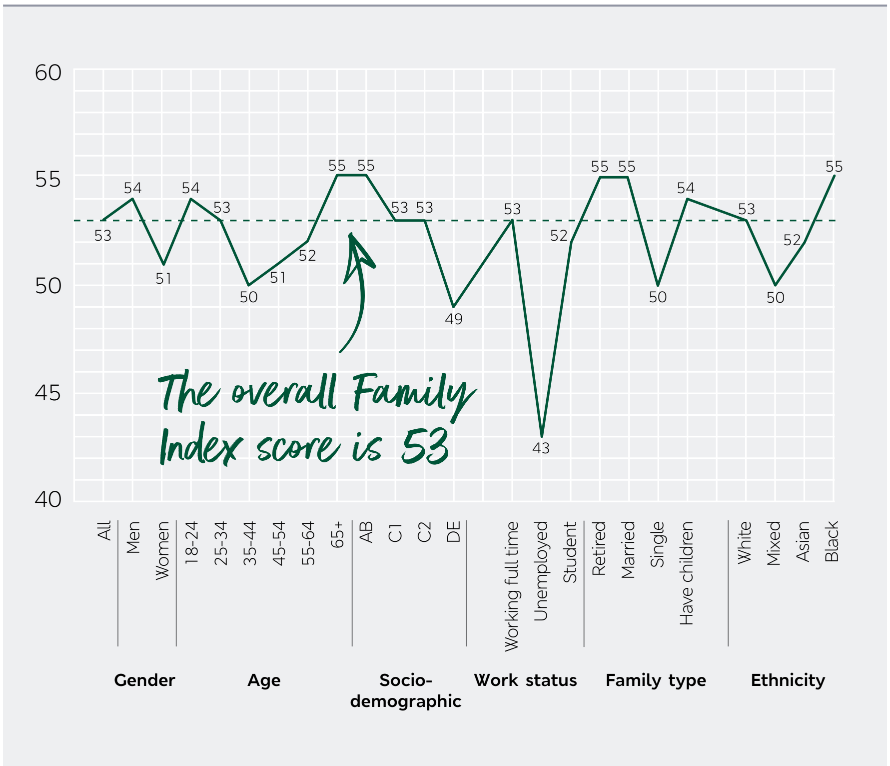
The average score for both men (54) and women (51) is lower than in the previous wave in November 2021. As in each of the three previous reports, the index score for women is slightly lower than for men, reflecting the fact that this research continues to find that women tend to be more concerned about societal and financial pressures.

The most significant change is among 35-44 year-olds, whose Family Index score has dropped by 3 points since the last survey, from 53 to 50. The lowest index score is, as it has been in every survey so far, among unemployed people, though this is unchanged at 43.

While optimism remains lower than last year, families have generally been happier over the past three months, no doubt reflecting the lifting of Covid restrictions. These gains are, however, perhaps offset by growing pessimism about financial prospects.

More than half of people (55%, up from 45% in November) are now worried about the long-term financial position of their family and 48% (up from 37% in November) are worried about their family's short-term finances. Women are markedly more worried about both than men, while middle-aged people are more worried than younger and older age groups, and people with children are notably more worried about family finances than those without children.

INDEX SCORES



1. Family feelings

42% (+2% vs. Nov 2021)
are optimistic about their family's prospects for the next three months [1]

33% (+8% vs. Nov 2021)
are concerned about their family getting enough nutritious food

82% (+10% vs. Nov 2021)
agree cost of living is top concern, with value the most important factor when deciding where to shop

34%
of parents are concerned that their children are missing out on chances to develop [2]

2. Lifestyle trends

61%
are planning a summer holiday, with beach holidays the most popular

Top three priorities this summer:

53%
are planning to eat more healthily

47%
are aiming to exercise regularly

40%
are hoping to spend more time outdoors

3. Spotlight on sustainability

64% (-1% vs. Nov 2021)
of families say environment is top concern [3]

72%
of families are making an effort to reduce food waste at home and recycle their clothes

71%
are taking steps to reduce the amount of single-use plastic they use

[1] Up from 40% in November, but down from 47% in August and 51% in March 2021
[2] 34%, down from 44% in May 2021
[3] Consistent from 65% in November

1. FAMILY FEELINGS

Our latest index finds that families are increasingly concerned about healthy eating. This is underpinned by concern about the cost of living, with families prioritising value above all else. Meanwhile, the environment continues to be a top concern, with families apprehensive about the impact on future generations.

In this section, we will look at:

a. What are the overarching concerns for families at the moment?

b. Priorities for extra family spending

c. The importance of value for money

a) What are the overarching concerns for families at the moment?

Concern about the cost of living has jumped by 10% since the previous M&S Family Matters Index in November 2021, and now ranks above wider societal concerns around environment, social division and inequality (though all of these do remain high priorities). Cost of living is cited as **a concern by more than 8 out of 10 people** across the country. Virtually every demographic group, in every region and nation of the UK, and among families of every shape and size, is equally concerned.

Moreover, the number of people **worried about their family getting nutritious food has risen** from 1 in 4 **to 1 in 3** since November – the fastest growing concern since the Index launched.

Younger people are more likely to be concerned about this than older age groups (44% of 25-44s vs 18% of 65+). Those with younger children (aged 10 and under) are particularly concerned (49%), compared to those with adult children (25%) or no children (32%).

Linked to concerns about nutrition, 54% are concerned about the health of their family in general – down from 56% in November, but up from 51% in August 2021. Women are markedly more worried than men about their family's health (59% vs 48%), and again, younger people tend to be more concerned about this than older people (57% of 25-44s vs 48% of 65+).

By contrast, **parents are feeling more optimistic about their children's chances to develop**. Fewer people (34%) this wave are concerned– down from 35% in November, 37% in August and 44% in March 2021. Similarly, less than a third (30%) of parents are worried about their children catching up on the education they lost because of the pandemic.

33%

are concerned about their family getting nutritious food – the fastest-growing concern since the index launched

TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS?

% agree	Mar 21	Aug 21	Nov 21	Apr 22
I am worried about the cost of living	-	-	72%	82%
I am worried about how environmental damage will affect future generations of my family	61%	64%	65%	64%
I am worried about the divisions in our country	60%	59%	62%	59%
I am worried about inequality in society	54%	55%	58%	56%
I am worried about the long-term finances of my family	36%	37%	45%	55%
I am worried about the health of my family	56%	51%	56%	54%
I am worried about my family's finances	-	-	-	53%
I am worried about my children's future job prospects*	53%	48%	50%	50%
I am worried about another wave of the coronavirus	-	-	-	50%
I am worried about the short-term finances of my family	29%	30%	37%	48%
I am worried about the cost of clothing	-	-	33%	43%
I am worried about not being able to afford the things my children need*	-	-	30%	36%
I am concerned my children are missing out chances to develop*	44%	37%	35%	34%
I am worried about my family getting nutritious food	22%	23%	25%	33%
I am worried about my children's education*	37%	33%	31%	32%
I am worried about my children catching up on the education they lost because of the pandemic*	-	-	-	30%

Chart shows % agree

**Statements asked only of respondents with children*

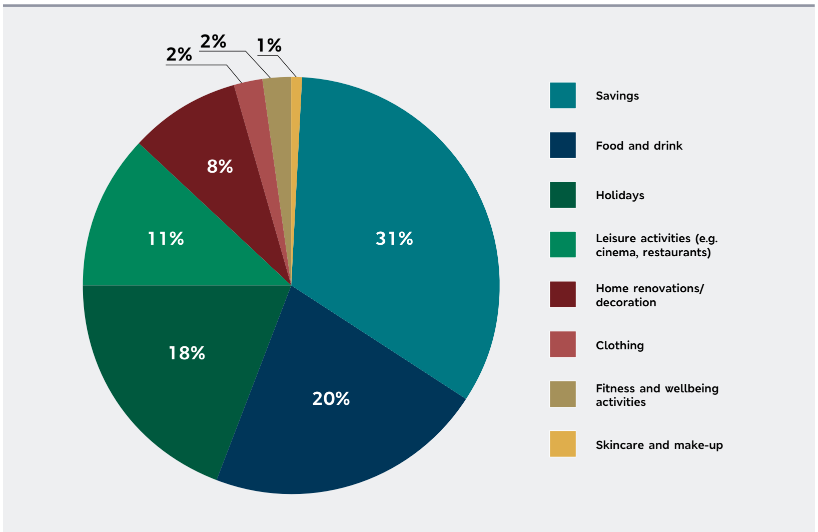
b) Priorities for extra family spending

Against the backdrop of rising concerns around financial security, the M&S Family Matters index finds that the **top priority for money that families may have left over** after accounting for housing costs and bills **is savings**, with 31% of people naming this as important. 18-24s are markedly more likely to prioritise savings than older age groups (40% of 18-24s vs 28% of 45-64s and 29% of 65+).

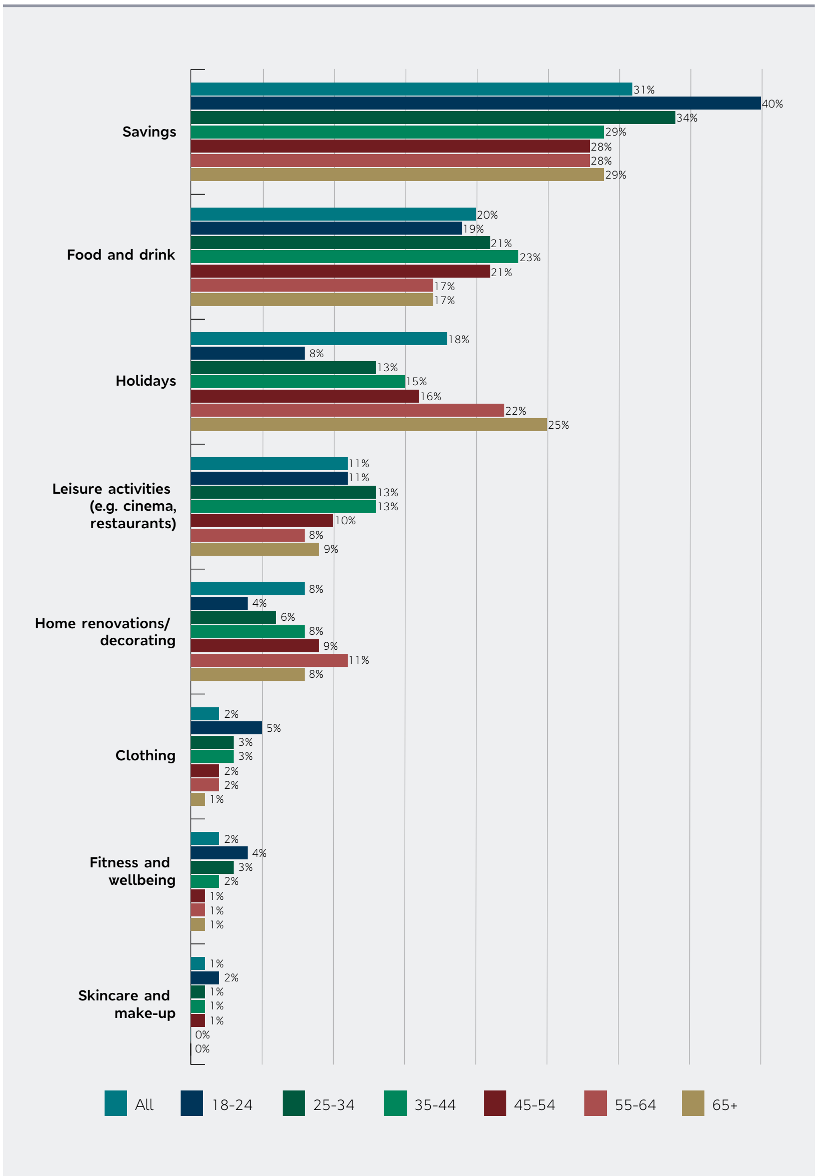
Food and drink ranks as the second-highest priority for leftover family funds (20%), just ahead of holidays (18%), which are a particular priority for those aged 65+ (25%).

Meanwhile, leisure activities (e.g. cinemas, restaurants) are the priority for extra spending for 11% of people, particularly for young families with children aged 10 and under (16%), as well as home renovations and decorating for 8%.

FAMILIES' SPENDING PRIORITIES OUTSIDE OF FIXED COSTS



SPENDING PRIORITIES BY AGE DEMOGRAPHIC



c) The importance of value for money

Value is front of mind for families at present. It is ranked as by far the most important factor in deciding where to shop, with nearly 8 in 10 people (78%) and all demographic groups naming this a top three priority. **Convenience (of buying and returning goods) ranks second** in importance, included in the top three most important factors by more than half of people (55%), **slightly ahead of customer service** (47%).

Younger adults (18-34s) are considerably less likely than older age groups to regard customer service as one of the most important factors, but more but more highly value the recommendations of friends and family. 18-34s are also much more likely than older people to regard a strong position on inclusion and diversity as important and to take into account a store's profile and content on social media, though even among 18-34s these factors rank in the top three in importance for only 12% and 8%, respectively.

Over the last three years, M&S Food has invested over £100 million in its value position as part of its commitment to trusted value. The Remarkable range offers great value everyday staples without compromising on quality or sourcing standards – now 1 in 4 M&S baskets include a Remarkable value product.

TOP 3 MOST IMPORTANT FACTORS IN DECIDING WHERE TO SHOP

% agree	All	18-34	35-54	55+
Value (high quality & reasonable pricing)	78%	74%	78%	82%
Convenience of buying/returning	55%	52%	56%	56%
Customer service	47%	36%	47%	56%
Website	21%	24%	22%	17%
Family/friend recommendations	18%	27%	17%	13%
Strong policies on the environment	12%	15%	13%	12%
Strong employment policies for its colleagues	8%	9%	7%	9%
Strong positions on inclusion and diversity	7%	12%	6%	4%
Profile and content on social media	3%	8%	3%	1%

Our 40 renewal stores help us to offer a seamless omnichannel experience for customers, with a range of new services including improved free digital Click & Collect facilities, digital self-service returns and in-store M&S opticians. Our loyalty scheme Sparks also means good things happen every time customers shop with us, from big treats to little thank yous.

2.
LIFESTYLE TRENDS

With Covid-19 restrictions lifted, families across the UK are looking forward to spending an action-packed summer together, with holidays and celebrations front of mind. People are as keen as ever to improve their health and exercise more, with healthy habits enduring even post-Covid.

In this section, we will look at:

a. How health and exercise are key priorities

b. Families' holiday and celebration plans

c. Which habits are people keeping post-Covid?

a) How health and exercise are key priorities

Families across the UK are increasingly invested in **improving their health by eating more healthily and exercising more often**. Health-focused plans top people's priorities for this summer. 25-34 year-olds are most likely to say they are making these changes. 60% of this age-group are planning to eat more healthily and 56% to get more exercise. Over 65s are least likely to be planning to do either, with 43% saying they intend to eat more healthily and only a third (34%) aiming to get more exercise.

Healthy eating has been a particular priority for people across the UK over the last three months. Of those who say that they have started to take their physical health more seriously, 52% say that they have already started to eat healthier food and 45% state that they are now eating the recommended 5 portions of fruit and vegetables every day.

This trend is set to continue as we move into summer, with **more than half of the population (53%) planning to improve their diet**. Women are especially likely to do so (60% vs 46% of men), and people in Scotland are most likely of all nations and regions to say they plan to eat healthier (59%), whilst those in Wales are least likely to do so (46%).

Doing more regular exercise has also been a focus for many. 62% of those who say they have made lifestyle changes over the last three months say that this has constituted doing more exercise and taking their physical health more seriously. **The most common change** people have made in this regard is to do **more walking or hiking**.

44% of people say that they also plan to **take their physical health more seriously as we move into summer**. 47% say they plan to do more regular exercise – women (49%) are slightly more likely to say they plan to do so than men (44%).

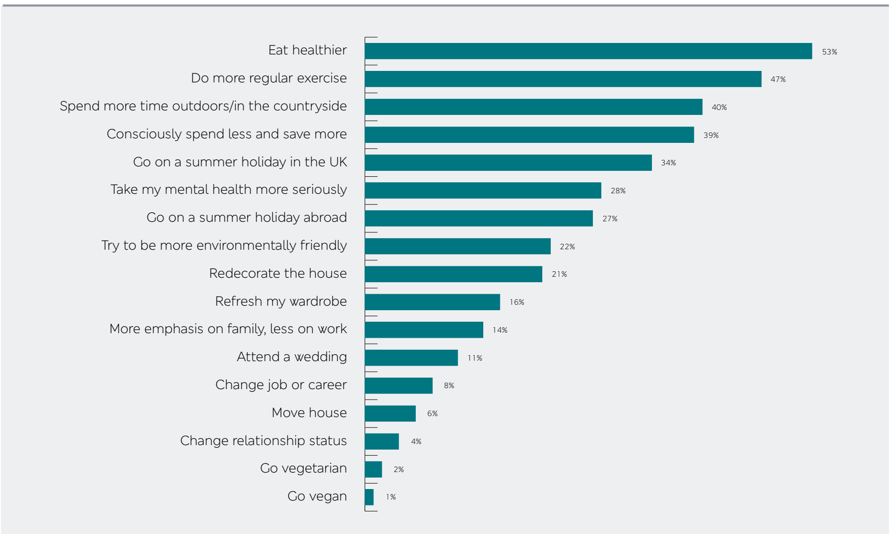
53%

are planning to eat more healthily this summer

47%

say they will be exercising more regularly this summer

THIS SUMMER, WHICH IF ANY OF THESE THINGS DO YOU PLAN TO DO?



WHICH OF THE FOLLOWING HAVE YOU DONE OR ARE PLANNING TO DO?

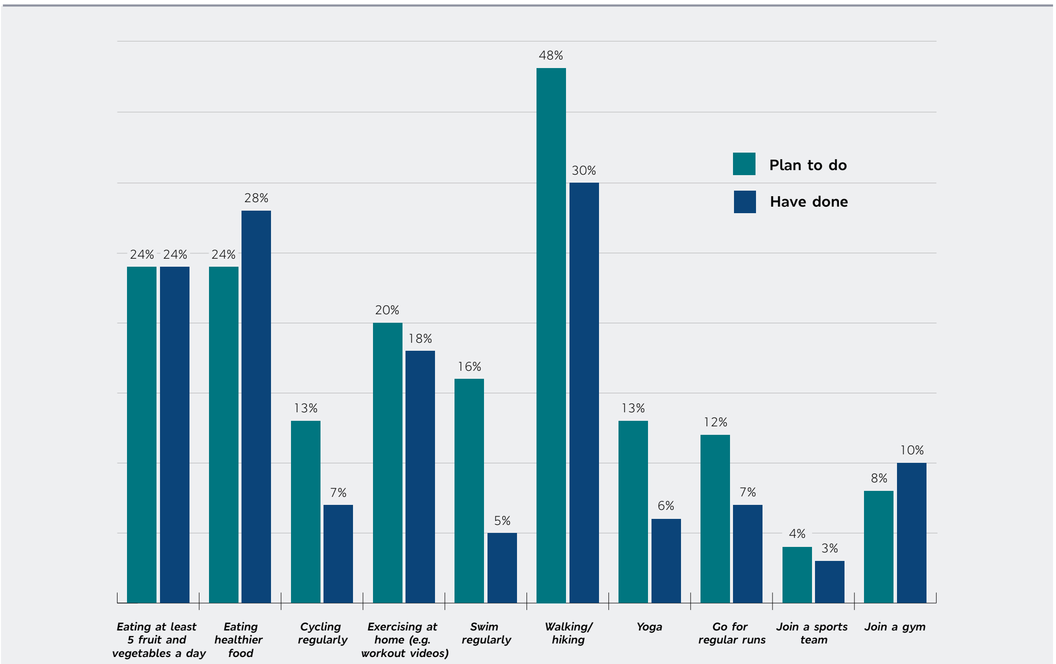


Chart shows % of all adults who agree who have done or plan to do.

b) Families' holiday and celebration plans

Well over half of people (61%) are currently planning a summer holiday this year, whether in the UK or abroad – and about 1 in 10 are planning a holiday both here and overseas. Going on holiday is the plan people are most looking forward to this summer.

Half of planned holidays are beach-based. Families with younger children are most likely to be planning beach holidays (62%) and those with adult children (45%) or no children (47%) are least likely to be doing so.

Countryside retreat holidays and city breaks are about half as popular on average as beach holidays. The former are most favoured by older people, while the latter are most popular among younger age groups.

Despite the large numbers expressing a general intention to do more exercise, only around one in ten (11%) of those planning a summer holiday this year have in mind a walking or hiking holiday – and only 5% are planning another kind of activity holiday such as cycling or rock climbing.

Nearly half (48%) the country plans to do something to mark Father's Day in June – mostly by buying a gift (28%), though women are much more likely (35%) than men (20%) to be doing that.

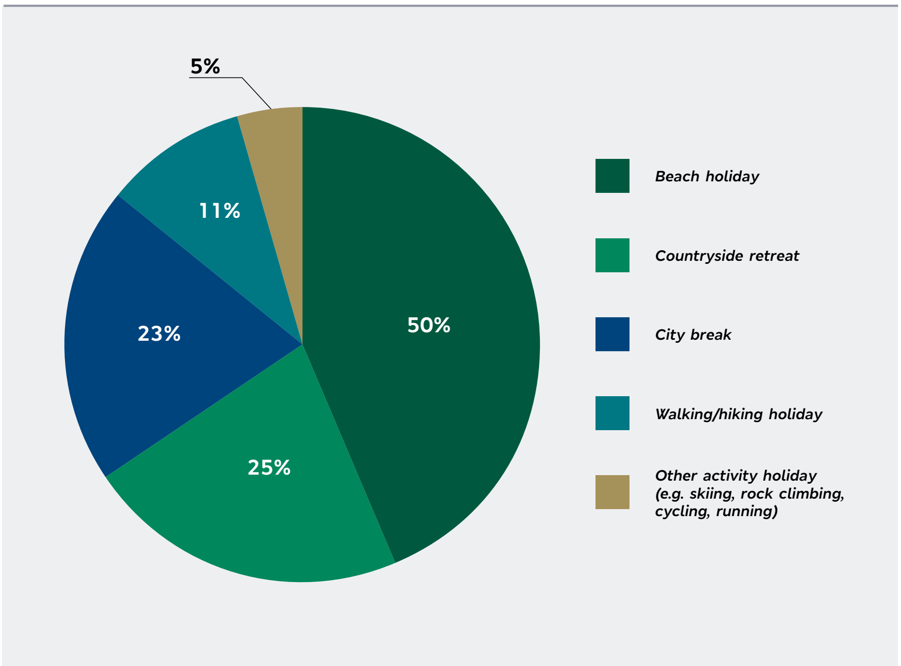
61%

of people are going on a summer holiday this year

50%

are planning beach holidays

PLANNED SUMMER HOLIDAYS THIS YEAR



YOU SAID THAT YOU ARE PLANNING TO GO ON HOLIDAY THIS SUMMER. WHICH OF THE BELOW BEST DESCRIBES WHAT TYPE OF HOLIDAY YOU ARE GOING ON?

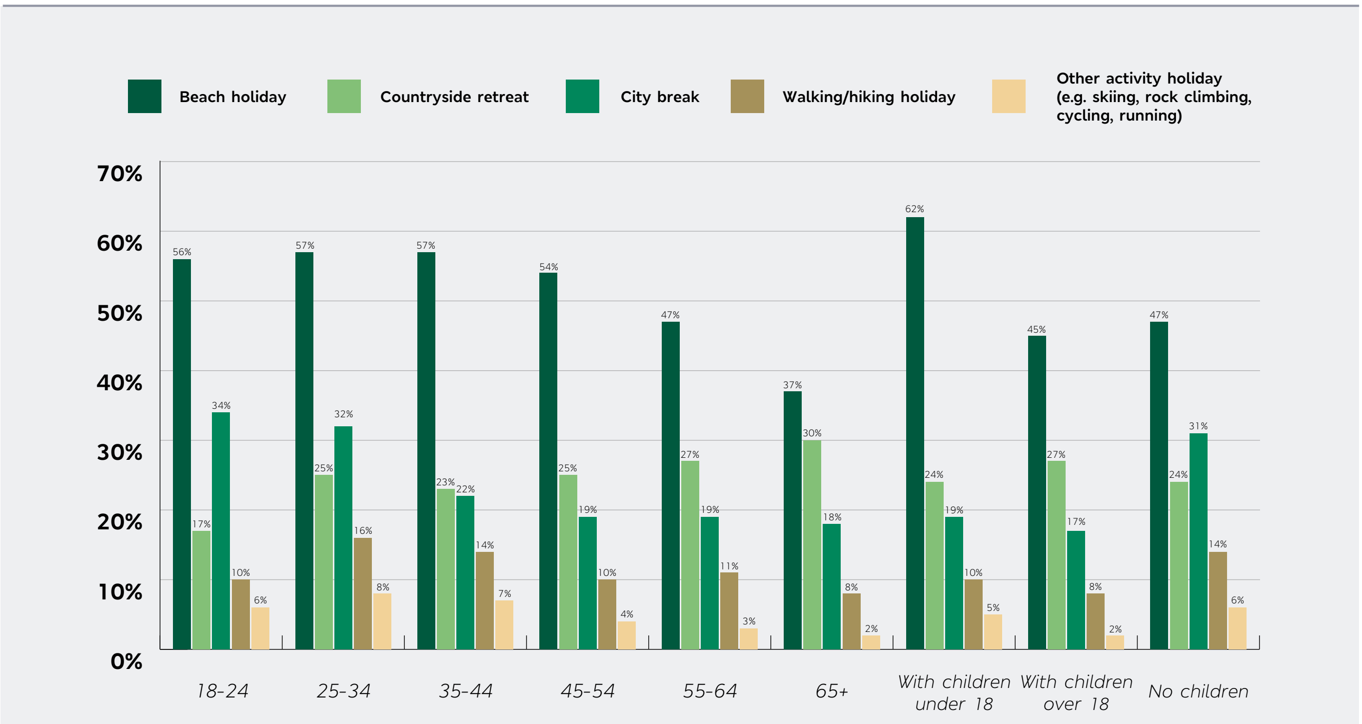


Chart shows responses from all who say they are planning to go on a summer holiday.

c) Which habits are people keeping post-Covid?

The testing experience of **living through the pandemic has led many families to change their habits** and to start doing things differently, or for the first time as a direct consequence of the restrictions it brought on lifestyles. The M&S Family Matters Index finds that some of these changed habits are continuing, even with the disruption of Covid now finally seeming to be behind us.

A third of people (34%) across the country are **continuing to spend more time outdoors**, having started to do this directly because of Covid. This is fairly consistent across different demographic groups but varies somewhat between different parts of the country, with people in Northern Ireland most likely to be continuing to spend more time outdoors (44%) and people in London least likely to do so (28%).

Nearly a third (29%) say that they are continuing to spend more time together as a family, having developed this habit during the pandemic. 25-44 year-olds are more likely to report this than other age groups and people with younger children are more likely to do so than those with adult children or no children.

A quarter of people say they are continuing the habit of exercising at home, and 1 in 5 are **still eating more together** as a family than they did before Covid. Nearly as many (18%) are continuing to learn new skills or hobbies, with younger people much more likely to say this than older people.

35% of people in full-time work and 25% of part-time workers are holding onto the better work/life balance that they established in response to Covid and lockdowns.

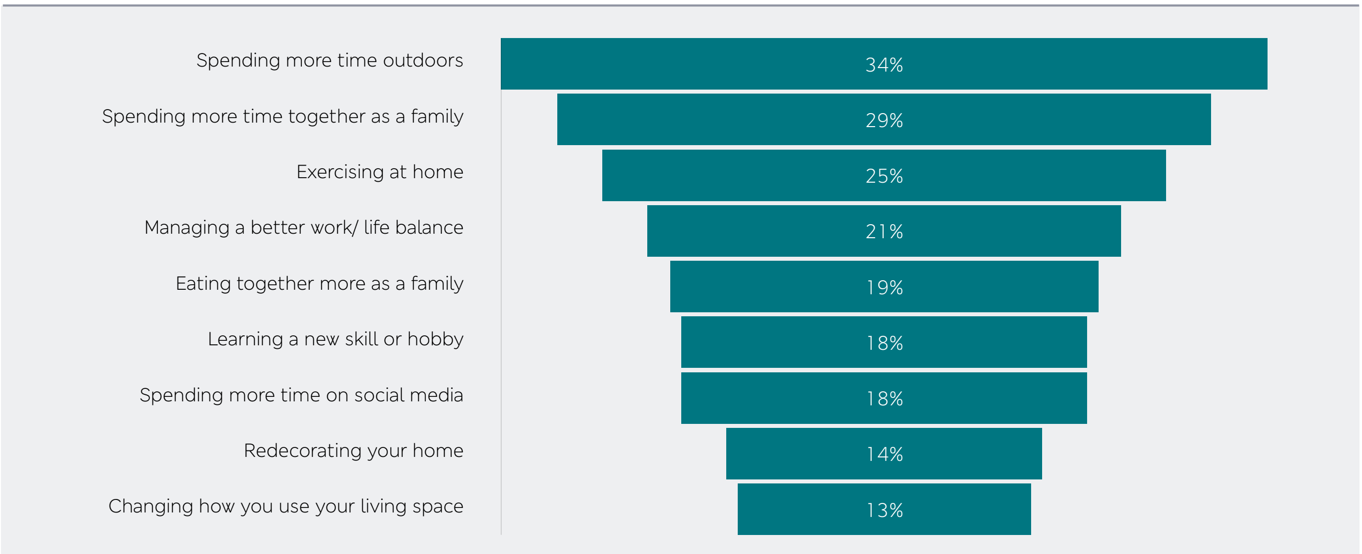
29%

say they are continuing to spend more time together as a family

35%

of full-time workers think they now have a better work/life balance

WHICH OF THE FOLLOWING HABITS, IF ANY, DID YOU DEVELOP DURING THE PANDEMIC AND ARE CONTINUING NOW, EVEN THOUGH ALL LEGAL RESTRICTIONS HAVE NOW ENDED?



Moreover, with people starting to work from home less and spending more time in their workplace, we asked which impacts of this change people were looking forward to, if at all.

The data shows that the public are most **looking forward to spending more time out the house**, whilst they are least looking forward to the impact the return to the workplace will have on time spent with their family'.

Over a quarter (26%) are looking forward to meeting colleagues in person and **1 in 5 is looking forward to meeting clients or customers** in person. Younger people are particularly excited to meet colleagues in person (37% of 18-24s vs 17% of those aged 45+) as well as those who have changed their job or career in the last 3 months (44% scoring 7-10 vs 26% on average).

WITH COVID RESTRICTIONS LIFTED, PEOPLE ARE STARTING TO WORK FROM HOME LESS AND SPEND MORE TIME IN THEIR WORKPLACE. ON A SCALE OF 0-10, WHERE 10 MEANS VERY MUCH AND 0 MEANS NOT AT ALL, HOW MUCH ARE YOU LOOKING FORWARD TO THE FOLLOWING IMPACTS OF THIS CHANGE?

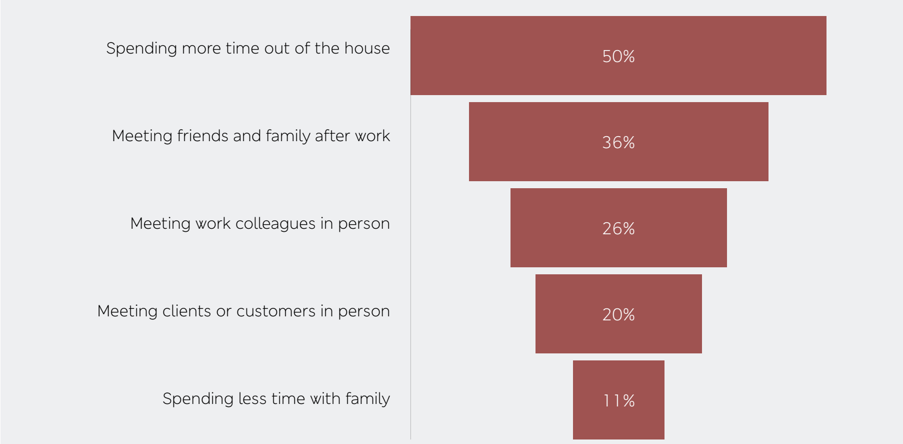


Chart shows % of adults scoring 7-10..

3.
SPOTLIGHT ON SUSTAINABILITY

Whilst in the face of the cost of living crisis, environmental concerns have slightly receded as a driver of consumer behaviour in this wave's index, many people across the UK are still making an active effort to be greener. Scrutiny of the Government and practices of big businesses also remains strong.

In this section, we will look at

a. Living more sustainably at home

b. Expectations of the Government and big businesses

a) Living more sustainably at home

More than 7 in 10 consumers say that they are reducing the amount of food that they waste, recycling clothes and cutting back on single-use plastics.

The number of people saying they make an effort to educate themselves about how to reduce environmental impact has reduced a little since the previous Family Matters Index in November, as has the proportion of consumers who say they have made changes in the food or clothing that they buy, to take account of climate change. 6% say they now hire clothes from online shops or websites.

Around 1 in 3 people across the UK say that they are planning to make changes in the clothing they buy and/or in the food they eat, to take account of climate change. 1 in 7 people overall now say they are either vegan or vegetarian specifically to reduce their own impact on the environment – and this applies to 1 in 4 18-24 year-olds.

6% say they now hire clothes from online shops or websites, with younger people most likely to - 17% of 18-24s and 11% of 25-34s.

TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS?

% agree	Aug 21	Nov 21	Apr 22
I am reducing the amount of food that I waste			72%
I recycle my clothes			72%
I am reducing the amount of single use plastic that I use			71%
I shop locally where possible			66%
I make an effort to educate myself about how I can reduce my environmental impact as a consumer		60%	56%
It is important to me that the shops I buy from are making their products as environmentally sustainable as possible, to make it easier for me to make sustainable choices	57%	58%	55%
I am making my clothes last longer because of climate change			48%
I have made changes in the food that I buy to try and take account of climate change	40%	41%	37%
I am planning to make changes in the food I buy to try and take account of climate change			37%
I have made changes in the clothing that I buy to try and take account of climate change	35%	36%	32%
I am planning to make changes in the clothing I buy to try and take account of climate change			31%
I am eating less meat because of climate change			31%
I don't see why I should change my habits because it won't make a difference to helping solve climate change		18%	17%
I am vegan or vegetarian to reduce my impact on the environment			14%
I hire clothes from online shops or websites			6%

Chart shows % agree

b) Expectations of the Government and big businesses

While environmental considerations may have been overtaken by cost of living concerns, our latest index finds that expectations of government and big businesses, specifically supermarkets, remain high.

Almost 9 in 10 people (88%) expect shops and supermarkets to use recyclable packaging where possible.

Older age groups are especially likely to expect this from the shops they buy from – 94% of people aged 55+ vs 79% of 18-24s.

Though the number of people agreeing that shops and supermarkets should provide clearer information about the origins and environmental impact of their products has marginally decreased (from 70% to 67%), **still over two thirds of consumers want this transparency**. Students, in particular, are likely to want this (71%).

Just over **6 in 10 people (62%) do not think that the Government and big businesses are making enough progress** on helping to address the challenges associated with climate change. Though this sees a downward trend since November (from 67%), this figure remains high. Women are more critical of progress than men (65% vs 59%, respectively), as are younger people (67% of 18-24s vs 58% of those aged 65+).

TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS?

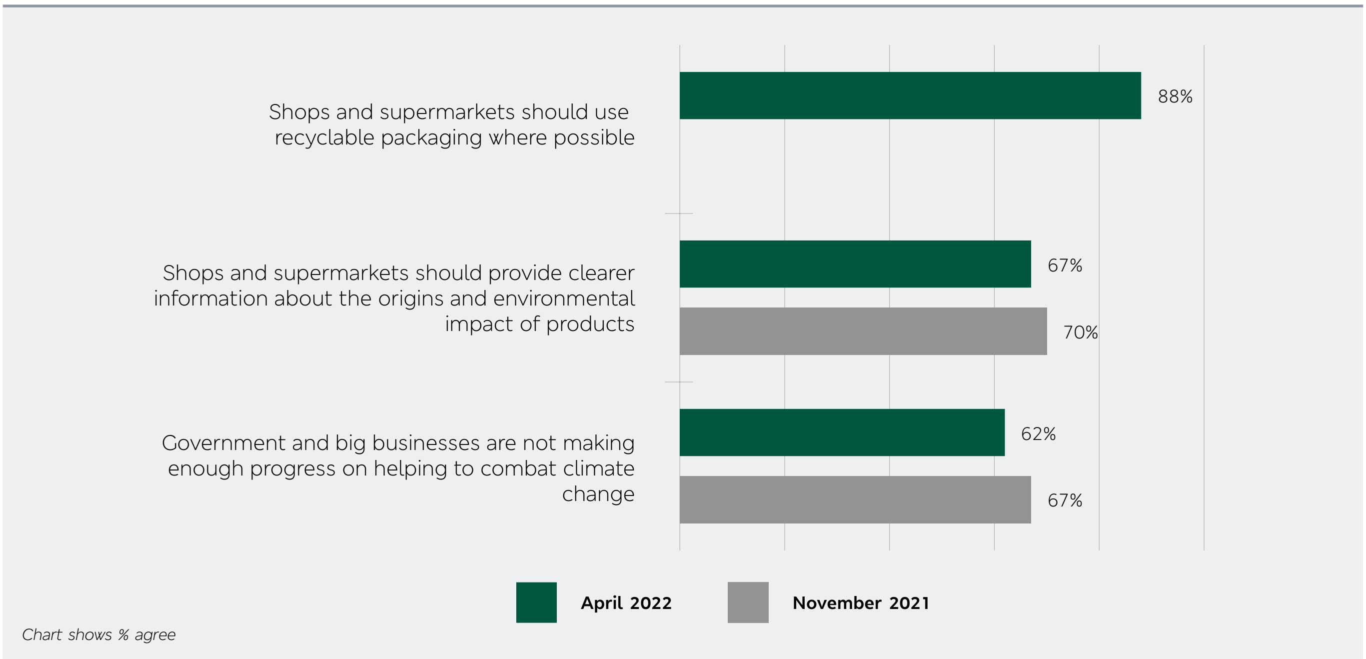


Chart shows % agree

Earlier this month we announced a new trial of refillable cleaning and laundry products in our Stevenage and Bluewater stores. Customers can choose from eight pre-filled homecare products, including cleaning sprays and laundry detergents, fabric conditioners and washing up liquids, all part of our commitment to remove 1bn units of plastic food packaging by 2027. Find out more in our 2022 Sustainability Report here.

CONCLUSION

This latest M&S Family Matters Index – the fourth – finds families have been feeling happier over the last three months. That said, when it comes to the immediate future, optimism is dropping fuelled by cost of living concerns.

More than 8 in 10 people are worried about the cost of living; more than half of people are worried about the long-term financial position of their family – and nearly half about their short term family finances. We expect this to remain a constant trend throughout the year, particularly as energy prices rise further in the autumn.

One consistent theme of the Family Matters indexes so far has been a growing interest in taking health and fitness more seriously and this trend is clear again in the latest data, with healthier eating a predominant theme. Nearly a third of people across the UK have already started to eat more healthily – and more than half say they plan to make this change during the spring and summer. Many people are also intending to do more physical exercise in the months ahead.

The Family Matters indexes have also tracked how some changes in behaviour and in priorities that came about in response to Covid, have lingered even with the pandemic now behind us. Lockdown rules gave a new value to time outdoors and many families are continuing to spend more time outdoors than they did before. Many families are also holding onto the lockdown-born habit of eating together more often than they did pre-Covid.

Despite financial concerns being at the forefront, concerns about the environment have remained consistently high. Our latest index reveals that families are making a considerable effort at home to reduce their carbon footprint, from reducing single-use plastic to reducing food waste. No wonder then that expectations of the Government and big businesses are high.

With cost of living pressures expected to continue, our ongoing M&S Family Matters indexes will explore how families across the UK are responding.

METHODOLOGY & SAMPLE

Yonder interviewed 5,020 adults online between 22nd & 25th April 2022. 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% at 95% confidence. Analysis of demographic sub-groups is based on a minimum sub-sample of 100.