

The M&S Family Matters Index,
June 2021

M&S

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FAMILY MATTERS



M&S serves nearly 30 million customers a year across the UK. Whether it is a Colin the Caterpillar cake to celebrate a birthday, a school uniform, the first bra, a suit for interview or one of our Select Farms turkeys at Christmas, our products help families make the everyday special as well as mark those family moments we can all relate to.

We offer trusted value to families in every sense; whether that is using 100% sustainably sourced cotton in our clothing lines or working with our Select Farms that we know and trust to offer more RSPCA Assured products than any other retailer. And we know that we're not just a retailer; for many we're an employer, partner and neighbour and we take that role seriously.

So we've launched a new Family Matters Index, in partnership with Yonder, to get and share a more granular understanding of how the UK's families are feeling, and what they're doing, so we stay close to what matters to them.

This first edition captures a unique moment in time, as we begin to emerge from the Covid pandemic. Our 10,000 respondents told us that family is more important than ever, and in a year when we have all spent so much time apart, it has brought us closer in ways we could never have imagined. We often talk about the M&S Family and this year, more than ever, it's been incredible to see how our colleagues have pulled together in support of each other. As this report tells us, family is not always about set structures or blood relationships, but the feelings of support, trust and loyalty we feel from those closest to us.

However, the real value of this project is that it is not simply a single piece of research. It is the first of a series of quarterly reports that will track how people feel about their family's financial security, health concerns, their optimism and the emerging issues that will be front of mind as we hopefully begin to move on from a year of lockdowns.

We want to know what's on our customers' minds – whether that's staying active, spending more time with loved ones or environmental concerns – so that we can keep our promise of delivering trusted value on the things that matter most to them.

The M&S Family

INTRODUCING THE M&S FAMILY MATTERS INDEX

The first M&S Family Matters Index, conducted by Yonder, is the benchmark study to understand what really matters to families in the UK, today and in the years to come. Through regular quarterly reports we will explore what family life looks like, the challenges families face, and their ambitions and plans for the future.

As we begin to emerge from lockdown, the M&S Family Matters Index will provide 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.

In this report we will be introducing the Family Matters Index and looking at the following three core themes which emerged from our qualitative and quantitative research:

1. What family means today - page 5
2. Why family matters - page 11
3. What matters to families now - page 17

The index has been generated using data from a nationally representative survey of 10,000 people across the country, enabling us to track changing attitudes around family over time as well as comparing how they vary from group to group. The Index score is a combination of different factors that measure the resilience and confidence of families today:

- Optimism about family prospects
- Feelings about the strength of families
- Happiness of families
- Family health
- Family financial prospects



EXECUTIVE SUMMARY

After a full year of living with Covid, we have had to learn to live with and adapt to the restrictions Covid has placed upon us all.

One aspect of life which has remained a constant challenge is the impact it has had on families, for example being separated for long periods and having to stay at home.

Encouragingly, data from this benchmark study suggests at least some good has come of it.

The overall Family Index score across the UK for this benchmark study is 55, based on all 10,000 responses. (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).

Within this overall national average, men have a slightly higher Family Index score (56) than women (53), reflecting the fact that on a range of issues this research shows women to be a bit more concerned and a little less optimistic than men.

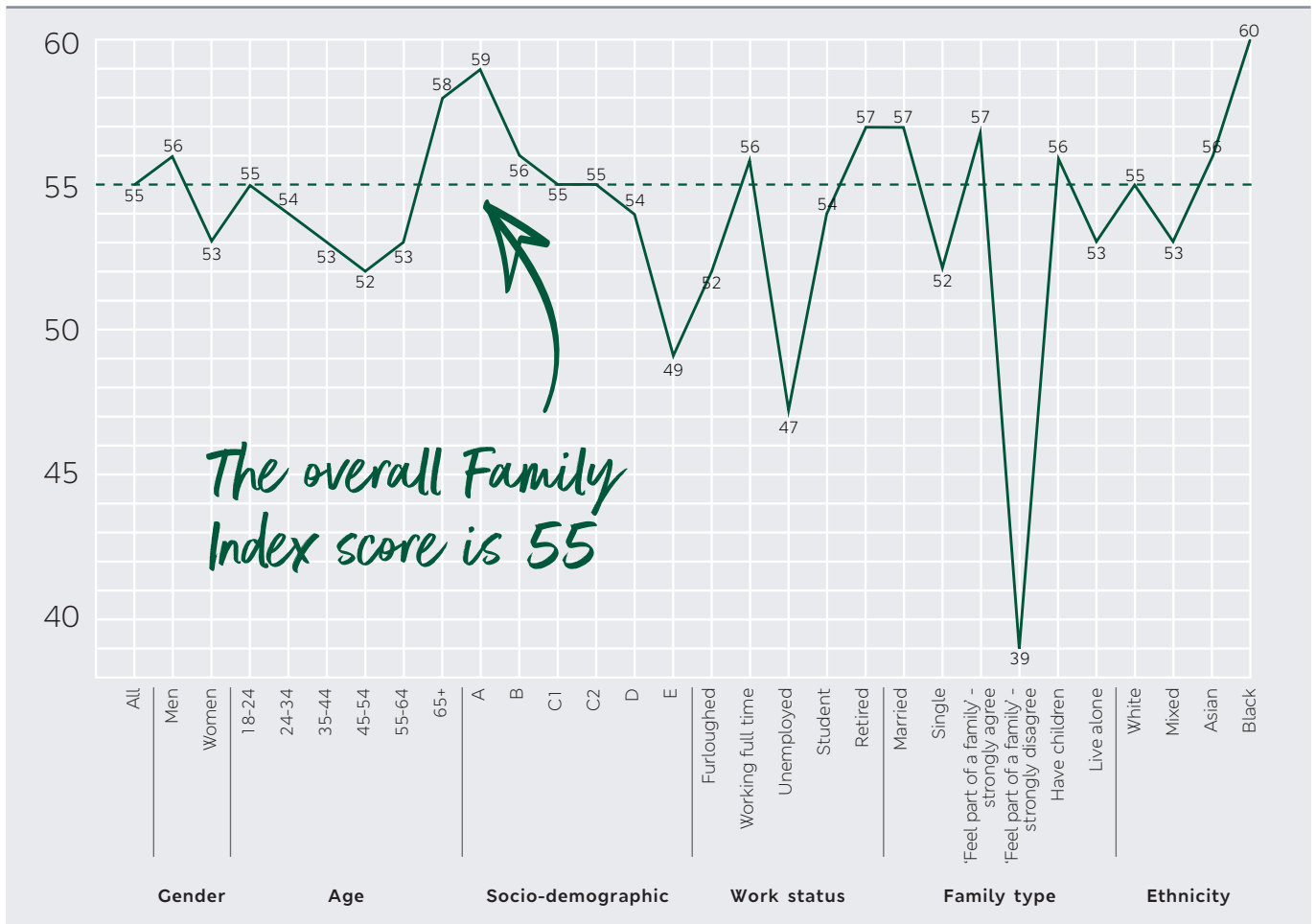
Among the groups with the highest Index score is the over-65s (58), driven in the main by both confidence in their short-term finances and the feeling that their family has never been stronger. Married people have a slightly higher Family Index score (57) than single people (52). There is a stark 18-point difference between those who agree strongly that

they 'feel part of a family' (57) and those who disagree (39), driven entirely by even larger differences of opinion regarding optimism, strength and happiness of their families. Interestingly, perceptions of family health are consistent across both groups and those least likely to feel part of a family are also significantly less concerned about their family's short-term finances.

Respondents in Scotland and the South East of England have a slightly lower Family Index score (53) than people in other regions of the UK.

We will be exploring the Index scores of other groups and the reasons behind them in future waves.

INDEX SCORES



1. What family means today

91%

feel part of a Family

1/2

agree family is unrecognisable compared to 20 years ago

55%

feel family is defined more by who you feel close to than by biology



2. Why family matters

79%

say family has never been more important

40%

say their family has never been stronger*

3x

as many people feel closer to their family than a year ago

64%

have been having video catch-ups

3. What matters to family now

61%

concerned about the environment

58%

concerned about health service availability

53%

concerned about children's job prospects

33%

talking about healthier eating

2/3

will do more activities as a family in future

1. WHAT 'FAMILY' MEANS IN THE UK IN 2021

The official definition of family used by the Office for National Statistics is, understandably, dry, technical and focused only on the structure of the family unit:
“A family is a married, civil partnered or cohabiting couple with or without children, or a lone parent with at least one child who lives at the same address. Children may be dependent or non-dependent.”

When talking to people about family, however, it is striking that most speak first not about the structure of the family, but about the feelings that define it.

Families come in all shapes and sizes. While the word family instinctively conjures up images of units comprising children and close relatives, when people are prompted to think a little more about who counts as 'family', a much more diverse and varied picture emerges.

In this section we will be exploring:

- a) How families are defined**
- b) How they have evolved**
- c) Who makes up a family**



"My family looks very different to yours, but I think our values are very similar. What we think is important has of course shifted slightly over the decades, but at the end of the day it's about being there, no matter what."

Male, 69

"I think family is more about a feeling, not what it looks like... It's what you get from being part of a family."

Female, 48

"I don't have much close contact with my biological family. I still love them, but day-to-day, my theatre company is my family...we see each other every day...we help each other with our problems...they provide me with that feeling of family."

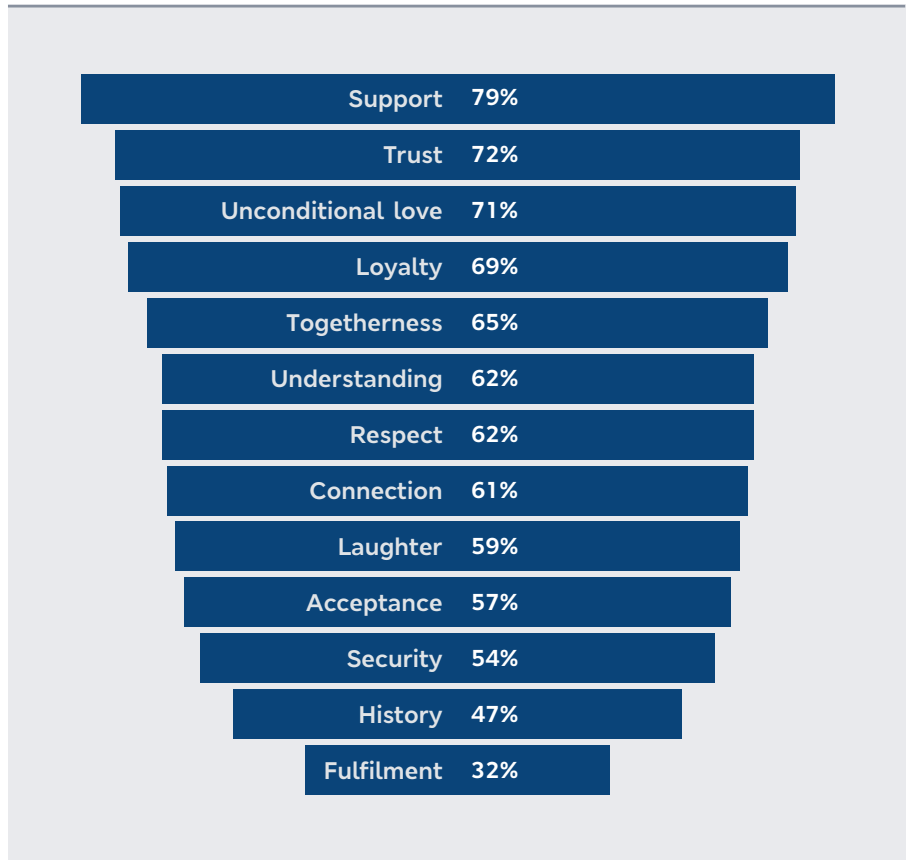
Male, 30

a) How we define Family

The same words recur in focus group discussions about what family means and the M&S Family Matters poll finds very broad agreement across all different groups that family is characterised by **‘Support’, ‘Trust’, ‘Unconditional love’** and **‘Loyalty’**.

The poll findings echo the comments about what family means by different types of people in the focus group discussions that formed an important part of this benchmark study.

These values are also widely seen as the things that make a family strong.



FAMILY IS...



“A closely knit circle of people offering love and support for each other in times of need and also able to join each other socially to have a good time.”

Male, 66

“A group of people who stick with each other, who support each other and who laugh and cry together.”

Male, 19

“Love and legacy, your chance to continue your genes and feel unconditional love.”

Male, 44

more than 90%
of people say
that they “feel
part of a family”

b) How families have evolved

'Family' emerges as the most inclusive of words. Not everyone, by any means, would fit within the ONS technical definition of family. But the real meaning of family in today's Britain is, for the vast majority of people, much more expansive – and more than 90% of people say that they "feel part of a family".

It is clear that people are conscious of how much the definition of what family means has evolved over time. One person summed up the view of many in the focus group discussions on family:

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“I think the term 'family' has really evolved...I think most people used to think of the classic 'mum, dad and two kids', but family is what you define it as... family looks different for everyone.”

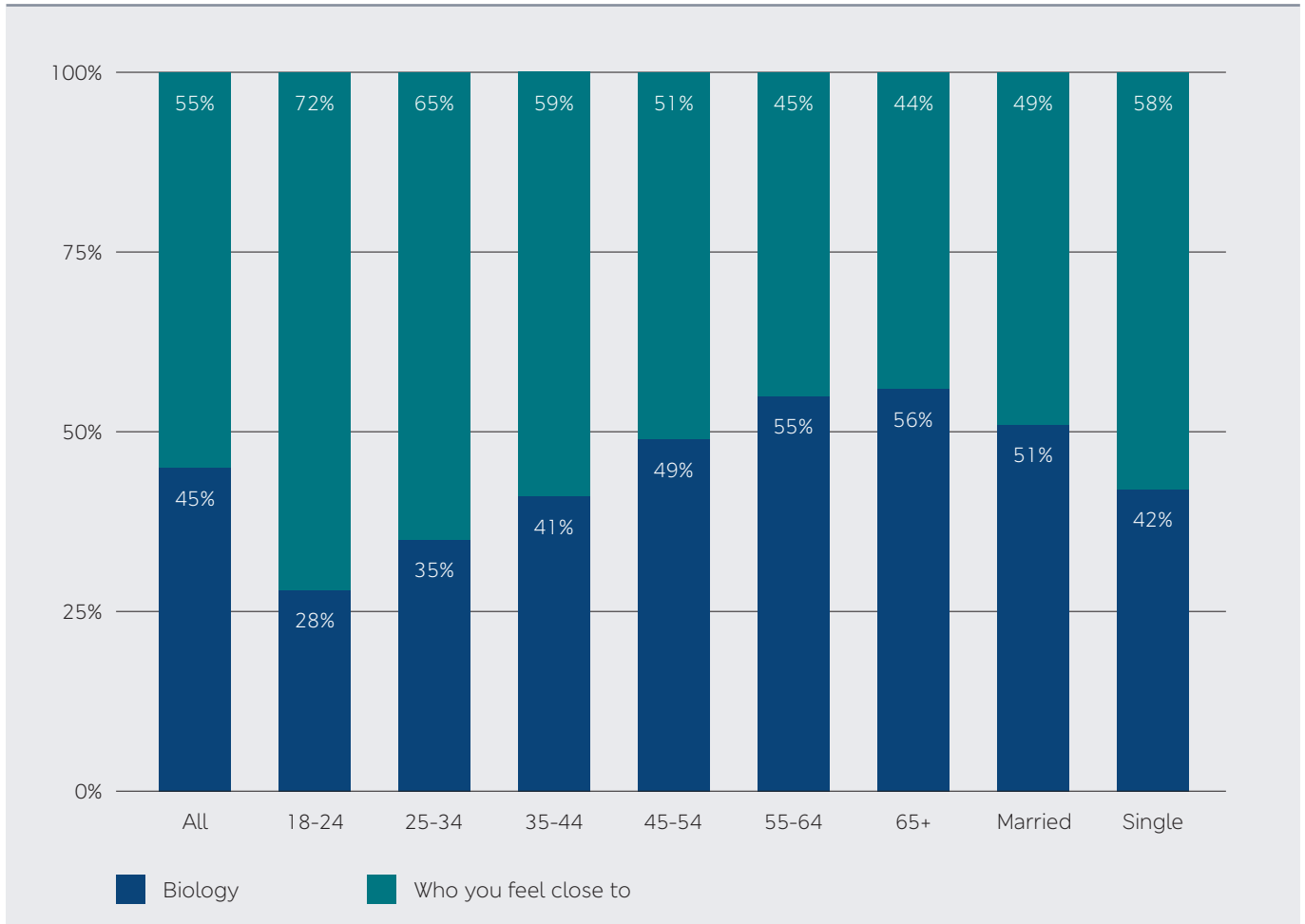
Female, 58

Half of the UK agree with the bold statement that 'the make-up of families is unrecognisable compared with 20 years ago'. Many people say they don't know if that is true or not, only one person in four thinks firmly that it isn't true.

Older people are more likely than younger people to feel this, but there is otherwise very little variation in view across different groups: dramatic change in the make-up of families over the last generation is a widely shared perception in the UK.



FAMILY IS MORE DEFINED BY...



c) Who makes up a family

The shape, size and boundaries of the families that almost everyone feels a part of vary significantly, however.

Almost everyone agrees, naturally enough, that family embraces spouses and partners, children and step-children and immediate blood relatives. But most people see family as extending well beyond relationships defined by blood or marriage.

Many people, especially older people, still tend to think of family as being 'defined by biology'. But more people – most people – feel that family is more 'about who you feel close to'. A majority of women (63%), but not of men (44%), take the latter view – and there is a sharp generational difference in view.

More than half of under-45s feel that family is defined more by who you are close to, but less than 40% of over-45s agree.

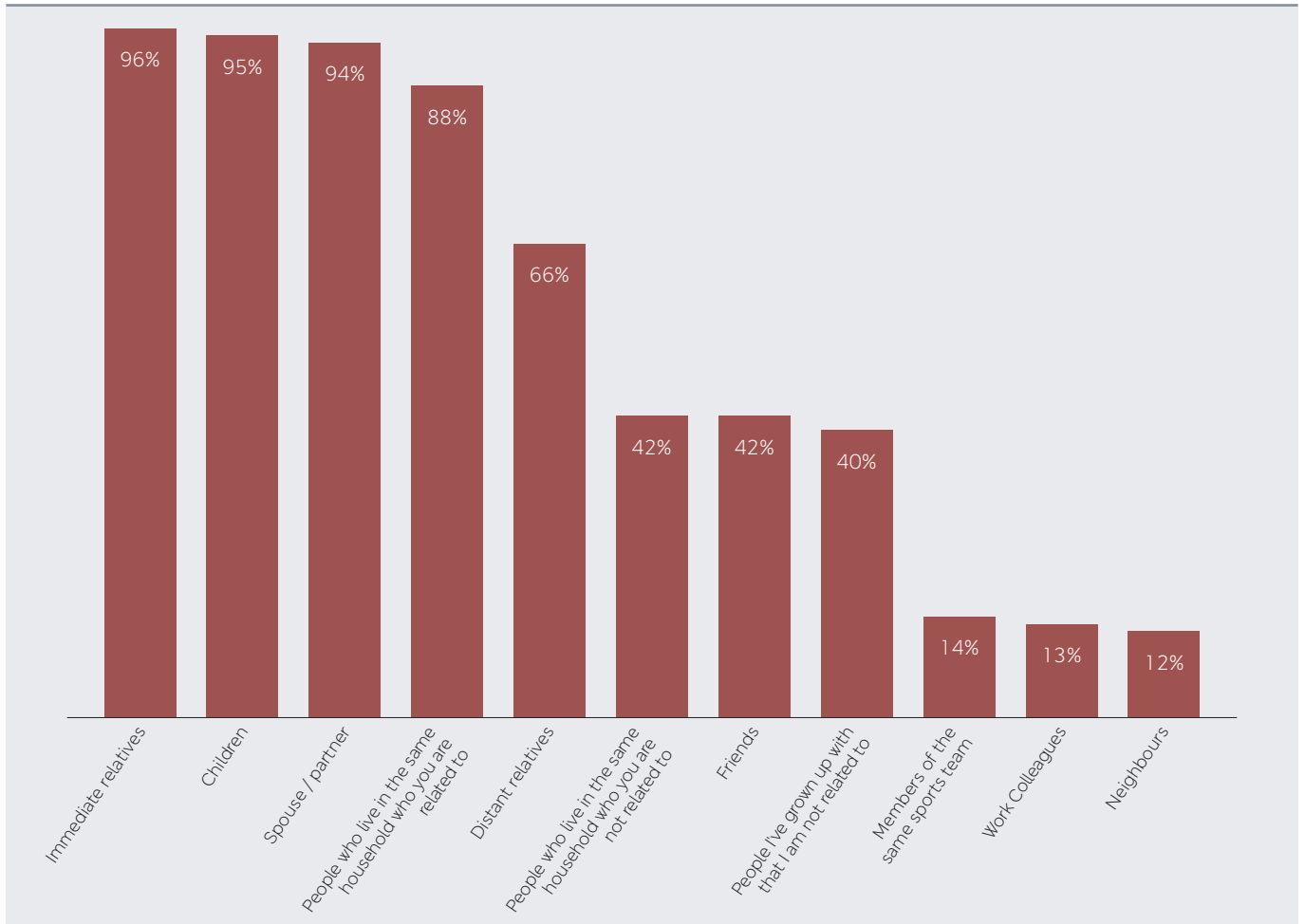
Over-65s are twice as likely as 18-24s to think that family is more defined by biology than by who you feel close to. Married people are, narrowly, more likely to think of family as being defined by biology than by who you feel close to, while single people take the opposite view – and by a considerably bigger margin.



“Family are the people I love, trust and can rely on - in good times and in bad. They don't have to be blood relatives as I count some of my best friends as family too.”

Female, 47

FAMILY CAN BE REPRESENTED BY...



For many people, family can also include

42%

Housemates

42%

Friends

40%

Those they have grown up with

For many people, family can also include housemates (42%), friends (42%) and those they have grown up with (40%). More people agree than disagree that these groups can count as family. Reflecting a consistently more expansive definition of family, women are somewhat more likely than men to take this view, while younger people, especially 18-24s and black and mixed-race people are significantly more likely to do so than the average for the whole country.

Some have an even more expansive and inclusive definition of family: around one in eight people say they think of neighbours, work colleagues and members of the same sports team as being family. Women and younger people are, again, more likely to feel this than men and older people, as are black, Asian and mixed-race people. Single people are also consistently more likely than married people to feel that neighbours, workmates and fellow members of sports teams can represent 'family'.




2. WHY FAMILY MATTERS

There is a very broad and deep consensus across the UK that ‘family is more important than ever’. Nearly 8 out of 10 people feel this - & only 5% disagree.

It is hard to measure the Covid effect on people’s feelings about family, but it is likely that the very widespread feeling that family has grown in importance reflects, among other factors, the huge impact that coronavirus and lockdown have had on families. People from all different walks of life have had the same experience of being constantly confined with some family members – with the pressures that inevitably brings – and also kept apart, for months on end, from other family members, which brings its own emotional pressures. It is very clear that in the age of Covid-19, even more than before, family matters.

In this section of the report, we will look at

- a) what families provide**
- b) why families are stronger than ever**
- c) the new activities that families are taking part in**



"The most important thing for us as a family is that you are there when things go wrong. Whatever that might be, you can always rely on your family to pick you up when you're at your worst."

Female, 20

"I think family are the ones to tell you the honest truth about something...friends might say things just to make you feel good... but family will tell you like it is, and sometimes you just need to hear that."

Female, 28

"A lot of people have used the term 'unconditional love' when talking about their families...I think that's the best way to describe it...you just know that family will always have your back. You can fail, but it won't matter. They'll help you back up and help you learn."

Male, 25

84%

of people feel that 'my family are there to help each other'

75%

of people feel 'my family makes me feel physically safe'

a) What families provide

Over 80% of people feel that 'my family are there to help each other' and more than two thirds that 'my family are good at helping with each other's problems' and 'make me feel physically safe'. More than half of people also say that their family provides financial security too.

b) Why families are stronger than ever

More than 40% across the UK say their family has never been stronger, while less than 20% disagree with the statement. Half of those with children think that their family has never been stronger, compared with only a third of people without children. Over-65s are much more likely than younger age-groups to think that their family has never been stronger. 51% of black people say that their family has never been stronger, as do 48% of Asian people and 41% of white people.

Despite all the pressures of lockdown, most people say that their family hasn't been having arguments – and slightly more families have been arguing less, rather than more, compared with the pre-Covid period. There are some generational differences in this, though. Older people are much more likely to feel they can have disagreements with family members and for it to not

negatively impact their relationship with family members than younger people – and also say that their family rarely argue anyway. Unsurprisingly, perhaps, the more people living in a household, the greater the likelihood of there being arguments within the family. It is probably more surprising that more arguments don't take place, given that - consistent across all age groups and demographics - only one in four feels that they have the same political views as the rest of their family.

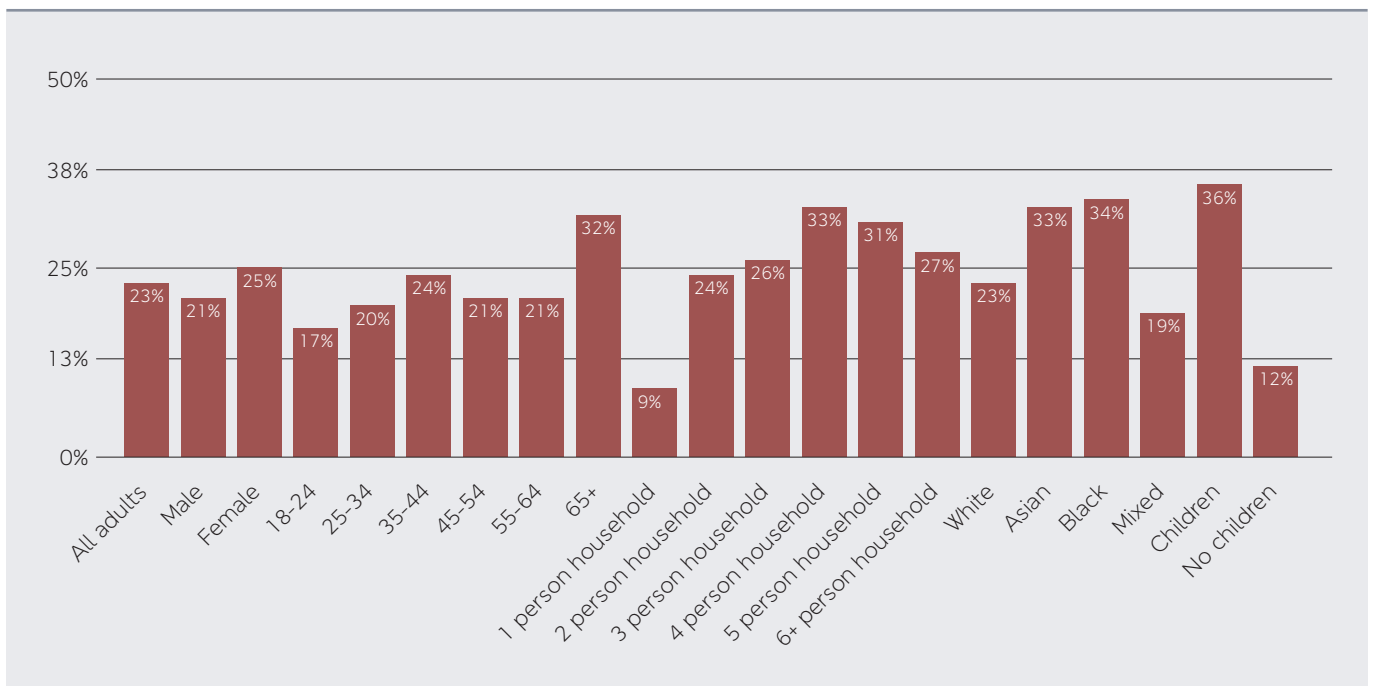
It is hard to assess the extent to which the experience of living through the Covid pandemic has directly contributed to the feeling many have that their family has never been stronger. That will become clear in future M&S Family Matters reports, as we monitor the extent to which family feelings, attitudes and behaviours change as the coronavirus diminishes in its impact on daily lives.

c) New activities that families are taking part in

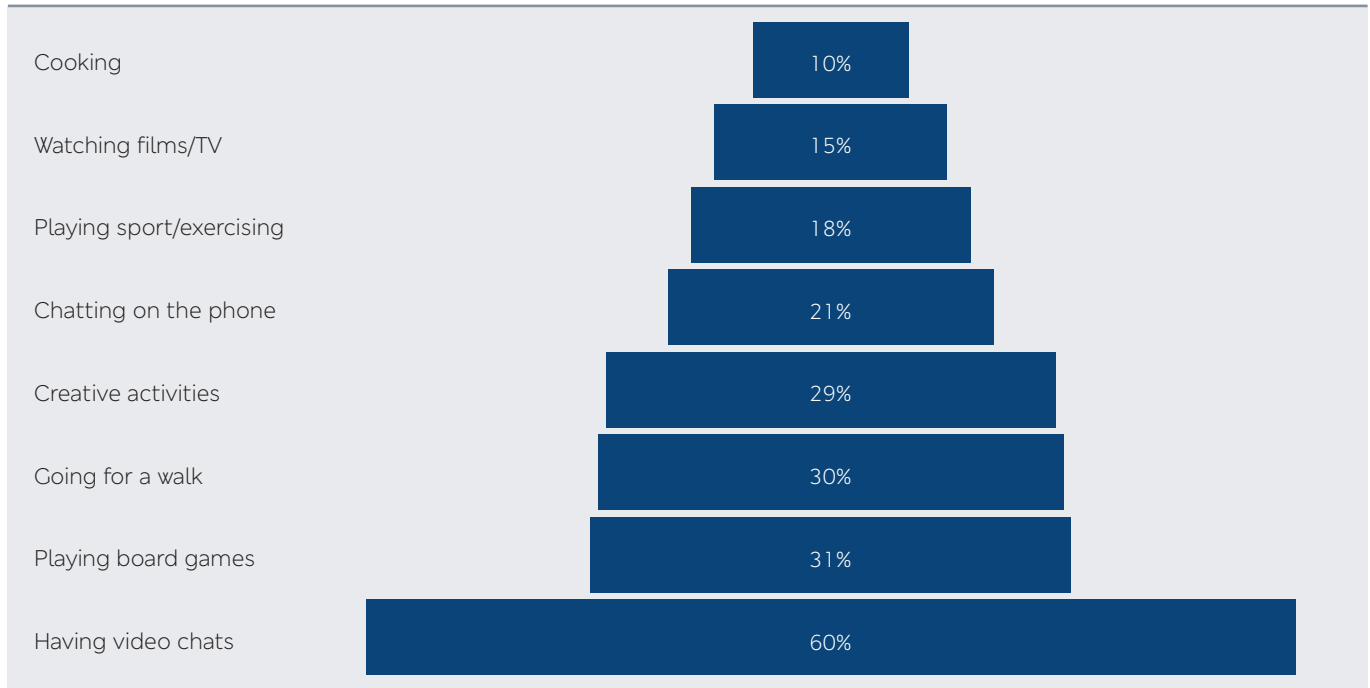
Family habits have changed in other ways too, in the homebound months of Covid-19.

Many families have participated in shared activities that weren't a big feature of their lives pre-Covid. Around a third of families are going for walks, playing board games and engaging in creative activities much more than before. While about one in five

"MY FAMILY HAS NEVER BEEN STRONGER" (NET AGREEMENT)



THINGS FAMILIES DIDN'T DO OFTEN/AT ALL BEFORE COVID, BUT DO QUITE OFTEN NOW



Food has been an important focal point for most families during the lockdowns

people report engaging in more exercise than they did before lockdown, rather more – around one in four – say that they exercised before the pandemic but do so less now. All these behaviour changes are reflected to a very similar degree across different groups in society.

Food has been an important focal point for most families during the lockdowns. Most people – around three quarters – say that they cooked meals at home quite often before the pandemic and have continued to do so. About **10% of people** say they didn't cook food very often before but have started to do so, but nearly as many report that they did cook quite often but do so less during lockdown. The people doing more home cooking than before are mostly under 35. As we emerge from lockdown life it will be interesting to see whether this is an abiding change or if people revert to their pre-Covid approach to cooking. Despite the manifest stresses and strains on families from more than a year of the

pandemic, one positive effect is that, overall, three times as many people feel closer to their family than they did twelve months ago as feel more distant. This feeling is, strikingly, consistent across all different demographic groups and shared in all parts of the country.

Technology has played an important part in this. While **around 30%** of people say that they feel less close to their family because they have been separated from them physically, more people – about two in five – feel 'closer than ever' to their family because of the technology that enables them to see and speak to each other: the Zoom effect.

Nearly two thirds of people report having video chats or meetings and six in ten of them say that it is something they did little or not at all before the pandemic struck. Furthermore, the number of people making a conscious effort to contact friends or family with whom they haven't been in touch for a while has nearly

3

times as many people feel closer to their family than they did twelve months ago

doubled during the lockdown: 37% say this is something they did before and continue to do and a further 35% say they didn't really do this before Covid-19 but have started to.



3. WHAT MATTERS TO FAMILIES NOW

Two different clusters of issues are at the front of people's minds when they think about their family – more immediate issues that directly and personally affect their family, and bigger picture concerns about the impact on families of global and societal issues. The same spectrum of issues feature in the topics that people say their family has been discussing during the months of lockdown. Despite the various immediate pressures on families caused by the pandemic, for many the big picture issues are of equal, if not greater concern, than the close-to-home issues they are dealing with.

In this section, we will look at

- a) Issues close to home**
- b) Big picture issues**
- c) What families are talking about**



"The biggest challenge for us as parents is knowing what our children are doing online and what they are doing on their phones...it feels like an unknown and we don't know how to start these conversations with our children."

Female, 51

"Sometimes we just don't get it right as parents. But I think that's ok...we're learning, and we learn together as a family. We talk to our children when things go wrong and ask them how we can be doing better...that's helped us a lot."

Male, 41

"I worry about my parents getting older and not being able to look after themselves. There isn't really a rule book about that and I don't have any other siblings, so I'm going to have to make big decisions in the future...and that's quite scary."

Male, 25

a) Issues close to home

Health

Of the more direct and immediate issues that worry people about their family, health takes priority – and is ranked the biggest concern of all by most people.

Nearly three in five people are concerned about the availability of health services and worried about the health of their family. Health is consistently a slightly higher concern for women than for men, but the same for those with children and without and across all income groups.

48% of people over the age of 65 say they are concerned about their family's health – lower than any other age group (average of 59% for all aged under 65) – though the over-65s are about as likely as younger people to be concerned about the availability of health services.

Health concerns probably wouldn't feature so prominently in family discussions without the presence of a pandemic. Healthier eating is as common a topic of conversation as politics, while managing stress and keeping fit have also been health-related concerns for families throughout the Covid crisis.

Financial concerns

Overall, the level of savings has risen sharply through the months of Covid-19 restrictions and many people have also paid off a lot of debt. But not everyone has been in this position.

Our data shows that around one in three people are worried about their family's short-term finances and slightly more, **36% are concerned about the long-term financial position of their family.** In both cases younger people are much

more likely to have these concerns than older people and those most likely to be worried are people living in larger households and, most of all, people who have been furloughed from their jobs.

Some people have very fundamental and immediate concerns for their family. **20% of people say that they are worried about keeping a roof over their head** and this rises to 32% among those currently furloughed from their job.

Nearly one person in four across the UK is worried about their family getting nutritious food.

Healthier eating is as common a topic of conversation as politics

% agreeing that "I am worried or concerned about..."	Agree	Disagree
how environmental damage will affect future generations	61%	17%
divisions in the country	60%	15%
the availability of health services	58%	22%
the health of my family	56%	22%
inequality in society	54%	18%
my children's future job prospects *	53%	25%
my children missing chances to develop *	44%	31%
who will look after my family if something bad happens to me	42%	35%
the availability of social services	40%	26%
my children's education *	37%	35%
long term finances of my family	36%	39%
I will not be able to care for my family	30%	43%
short term finances of my family	29%	47%
my family getting nutritious food	22%	55%
keeping a roof over my head	20%	61%
being able to put food on the table	17%	64%

* Asked only of respondents with children

Children's development

Most people across the country have specific anxieties about the impact of coronavirus lockdowns on the future for the country's children.

More than half overall are worried about the impact on children's future job prospects.

Parents of 16 and 17 year-olds are especially concerned about this. Nearly as many (44%) worry about the opportunities to develop, which children have missed out on because of the pandemic.

Nearly two in five of parents overall are worried about how their own children's education has suffered because of the pandemic – with nearly half of black parents (46%) and two thirds of Asian parents expressing this fear. Parents of 11-15 year-olds are the most anxious of all about their children's education and also about missed opportunities for their children to develop.

b) Big-picture issues

Some bigger picture issues are just as big a worry for families as the close-to-home concerns. In particular, environmental damage, divisions in society and social inequality are all raised as worries by more than half of people – and all have become greater concerns during the period of the pandemic.

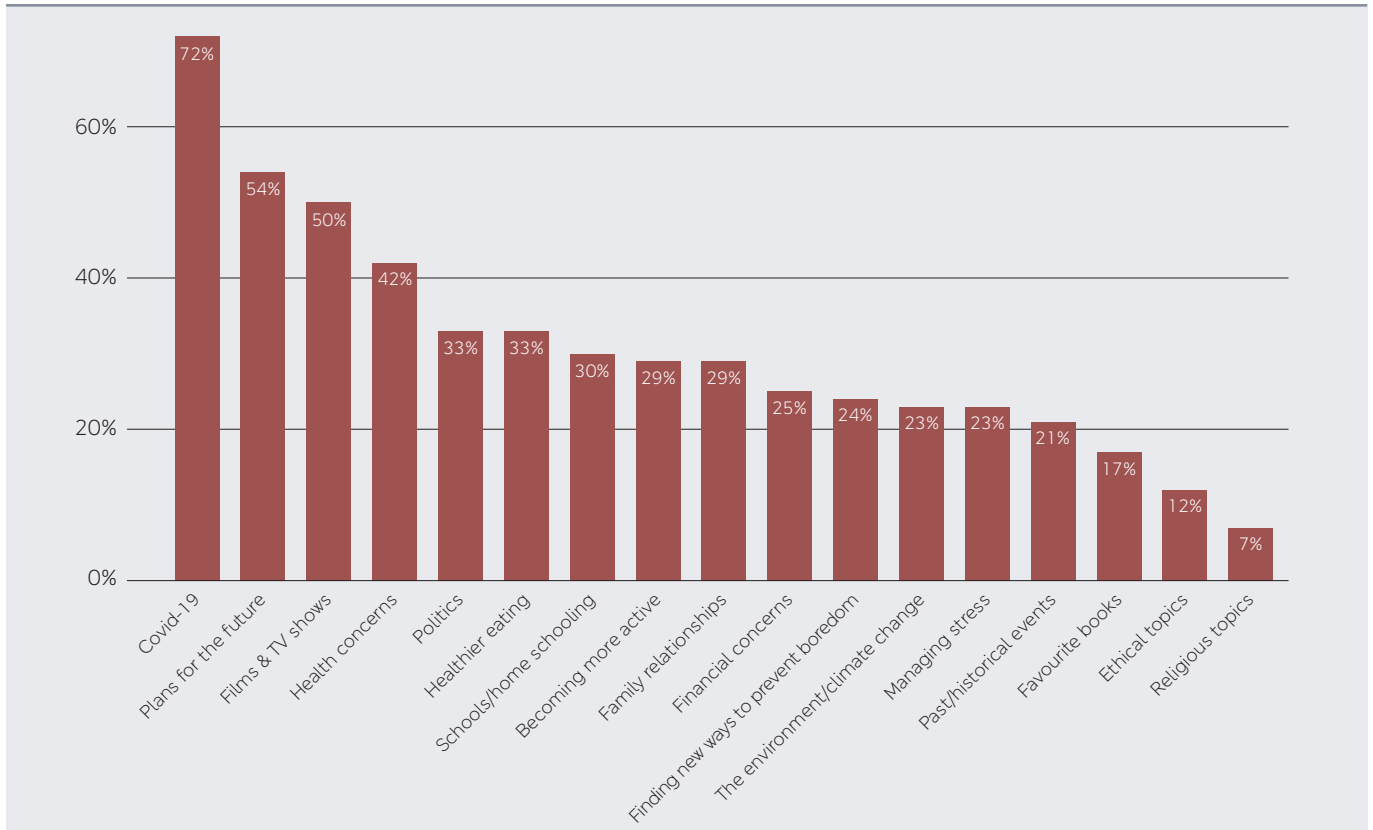
Women are somewhat more likely than men to express concern about the impact of environmental damage on future generations, but there is very little variation in view on this between different generations or by other demographics.

Concern about inequality in society is considerably higher among younger people (68% among 18-24s falling to 45% among over-65s) and markedly higher among black, Asian and mixed-race people than among white people.

The topics that families have been discussing reveal a lot about the challenges of living through Covid – and what people say they have been talking about is very similar among different groups and differing types of family. As a country we've mostly all been talking about the same things in our families since the pandemic struck – and unsurprisingly Covid itself has been the dominant topic of discussion, followed by the plans families for life after Covid and the films and TV shows that have absorbed lockdown time for so many.



WHAT ARE YOU CURRENTLY TALKING ABOUT IN YOUR FAMILY?



46%
of people say "it is important for me and my family to go on holiday in the next 12 months"

Health concerns have been a recurring topic in many families – more so than politics, which only a third of families have been talking about.

away from their family when relaxation of Covid restrictions allows that, a feeling also more likely to be found among younger people.

53%
of people say "in the next 12 months I will have a big family gathering"

Most people haven't been discussing politics with their family, but the number who have done so is nearly five times greater than the number who have discussed religion.

More than half the country wants to have a big family get together in the year ahead and this determination is shared among all different groups and generations.

67%
of people say "I want to do more activities with my family"

Among parents of school-age children the dominant topic of family conversation – ahead of all other issues – has been lessons and home-schooling.

Most people are also craving a family holiday in the coming year, with almost half saying this is 'important' for them and their family to do so. People with school-age children are significantly more likely to place importance on a family holiday in the year ahead than those with adult children or no children.

Thinking about the coming months, as the country opens up again, two thirds of people have resolved to do more activities as a family – perhaps another indication of how Covid has brought families closer together.

In the discussions families have been having about post-Covid plans, women are more likely to want to do more family activities than men – and interest in doing more activities with the family decreases as age increases. People who live alone are less likely than those in large households to want to do more family activities, while people living alongside 5 or 6 others are most likely to be looking forward to some time



CONCLUSION

This inaugural M&S Family Matters study clearly shows that despite more than a year of Covid related challenges, across the country the role of the family has rarely been more important. People identify with and value being part of a family, and while the definition of what it means to be a family varies, the benefit it brings does not.

But being part of a family also comes with challenges and the restrictions placed on us all by Covid have intensified many of them. Physical separation, health and financial concerns brought about by lockdown have all placed a strain on family units like never before.

With the end of Covid lockdowns in sight but with no one knowing what that actually means for how people live their lives in future, the Family Matters study will be keeping a close eye on what this readjustment means for families across the UK. As people return from furlough or seek new work, or as people put into action the plans they made during lockdown to spend more time with their families once 'life got back to normal', our next quarterly report will look at how the role of families has evolved and how what matters to families is changing.

METHODOLOGY & SAMPLE

Yonder conducted eight online focus groups with adults from across the UK. Participants spanned a wide range of ages and family situations. Each focus group took the form of a structured two-hour discussion about what 'family' means, the feelings and values that people associate with families and the range of hopes, fears, issues and priorities that relate to family life in the UK today. Groups were conducted between 4th and 8th February 2021.

The qualitative insight and outputs from the focus groups informed an online questionnaire about family, which was completed by a nationally representative sample of 10,000 adults between 4th & 17th March 2021. The purpose of such a large survey sample is to enable us to look with confidence at the responses of different demographic sub-groups and to present a picture of UK families that reflects and captures its diversity. Overall, the findings from the quantitative survey are accurate to a margin of error of less than 1% and analysis of demographic sub-groups is based on a minimum sample of 100.

