

The M&S Family Matters Index,
September 2021

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FAMILY MATTERS

M&S AND FAMILIES

THE M&S FAMILY MATTERS INDEX

The M&S Family Matters Index is a continuing journey to understand what really matters to families in the UK, today and in the years to come. This is the second of our regular 3-monthly reports exploring the priorities, challenges, ambitions and plans of families.

This latest study was conducted after lockdown when social distancing laws came to an end. Whereas the first M&S Family Matters survey captured attitudes after a year of Covid-19 lockdown, the new survey covers family feelings and plans as life started to return to normal, with more freedoms to mix with friends and family beyond households, and to travel. It tells a story of relief, reflection, changing priorities and renewed commitment to family – all shaped by the experience of living through the pandemic.

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

1. Post-lockdown family feelings - page 6
2. Family events (& family Christmas) - page 9
3. Lifestyle changes - page 11
4. Family concerns now - page 13

EXECUTIVE SUMMARY

We have created the M&S Family Matters Index to 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.

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

The M&S Family Matters index will track 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, Family financial prospects.

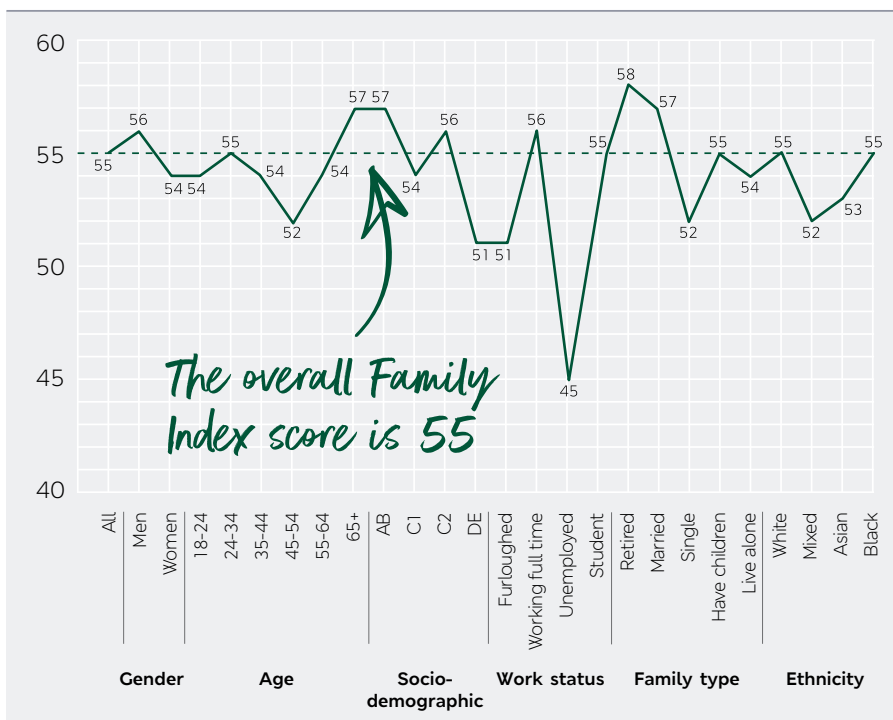
The overall Family Index for the UK as a whole, stands at 55 - the same as in the first M&S Family Matters survey earlier this year.

Within this overall national average, men have a slightly higher Family Index score (56) than women (54). The pattern emerging from the first two surveys is that on a range of different issues women are a bit more concerned and a bit less optimistic than men.

People who have been furloughed from their jobs have a markedly lower Index score (51) than the country overall and it has dropped by a point since March.

The lowest Family Index score of all (45) is for unemployed people, who understandably are significantly less optimistic about their family's prospects and less positive about their financial situation.

INDEX SCORES



1. Post-lockdown family feelings

44%

say living through Covid-19 has brought their family closer together than before

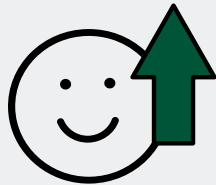


+17%

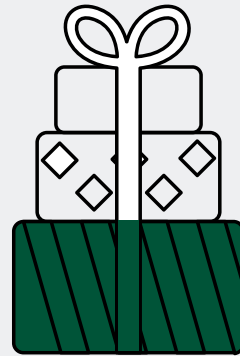
net increase in the number of people saying "my family has been in a happy place over the last 3 months"

+19%

net increase in the number of people saying that "the last 3 months have been very positive for me"



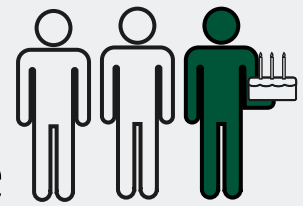
2. Family events (& family Christmas)



39%

plan to do more to mark Christmas than they did before Covid-19

1 in 3 people

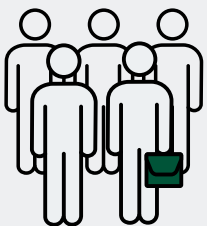


plan to do more to mark family birthdays than they did before Covid-19

3. Lifestyle changes

58%

say that living through the pandemic has made them plan lifestyle changes

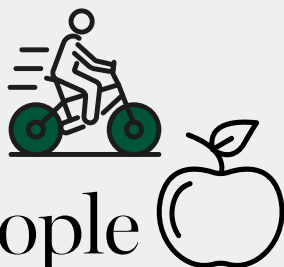


1 in 6 people

in work plan to change their job or their career

37%

of adults will do more exercise or take more care of their health



1 in 10 people

plan to change their diet

4. Family concerns

64%

are worried about how environmental damage will affect future generations



57%

It is important that the shops I buy from are making their products as environmentally sustainable as possible

70%

believe we should be making our clothes last longer because of climate change

40%

have made changes in the food they buy because of climate change

1. POST-LOCKDOWN FAMILY FEELINGS

The relief families felt as the country opened up from the months of lockdown comes through loud and clear from this research.

In this section we will be exploring:

- a) What has changed for families since lockdown**
- b) What families are talking about since lockdown**



a) What has changed for families since lockdown

The biggest changes of all since the first M&S Family Matters poll six months ago are the significant rise in the number of people agreeing that their family 'have been in a happy place over the last three months' (up by 17% net) and that 'the last three months have been very positive for me' (up by 19% net).

The first M&S Family Matters report found that with all the challenges Covid-19 has brought for families, it has also made families matter more to people.

That conclusion is confirmed in the new poll data, with more than half (51%) saying that they will make more of an effort to keep in touch with their family than they did before the pandemic. As life returns more to normal, almost half of people (44%) say that living through Covid-19 has brought their family closer together than ever before. Asian people (64%) and Black people

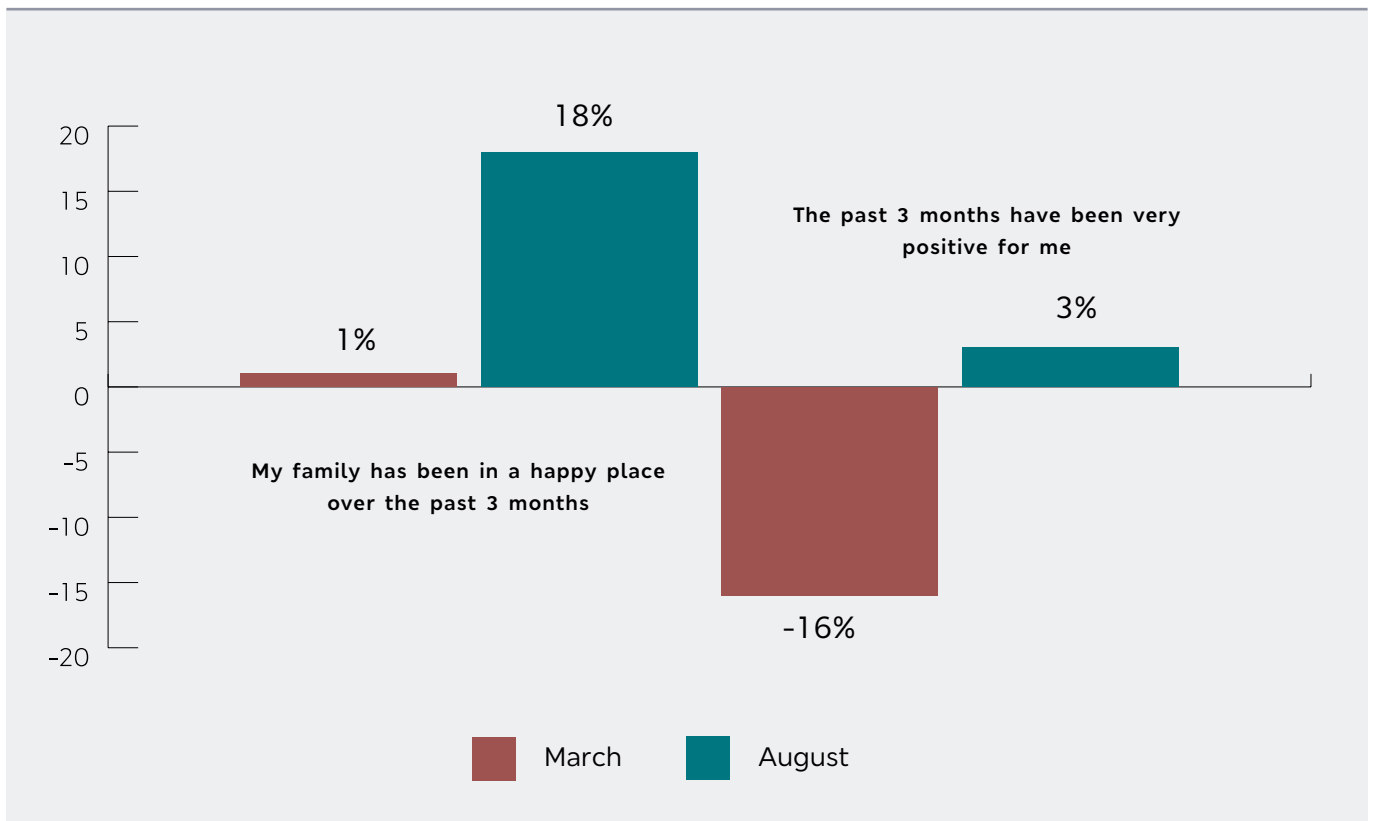
(55%) are more likely to say this than White people (43%). Younger people are more likely to say it than older people (51% of under-45s, 39% of over-45s).

Reflecting on the long months of Covid-19 lockdowns, 36% say that "eating together as a family became more important during Covid-19", with younger people much more likely to feel this than older people: nearly twice as many 18-24s (46%) feel it as over-65s (26%).

The latest research identifies one specific respect in which the experience of living through Covid-19 has changed family habits. More than 2 in 5 people say that they will continue to use video calls as a way to keep in touch with family members, even after Covid-19 is behind us.



NET AGREEMENT



b) What families are talking about since lockdown

The shadow of coronavirus receding can also be seen in the topics that families have been talking about with one another. Though Covid-19 is still the number one topic of conversation, it has dropped significantly in prominence, now featuring in just over half of families, compared with nearly three quarters back in the spring.

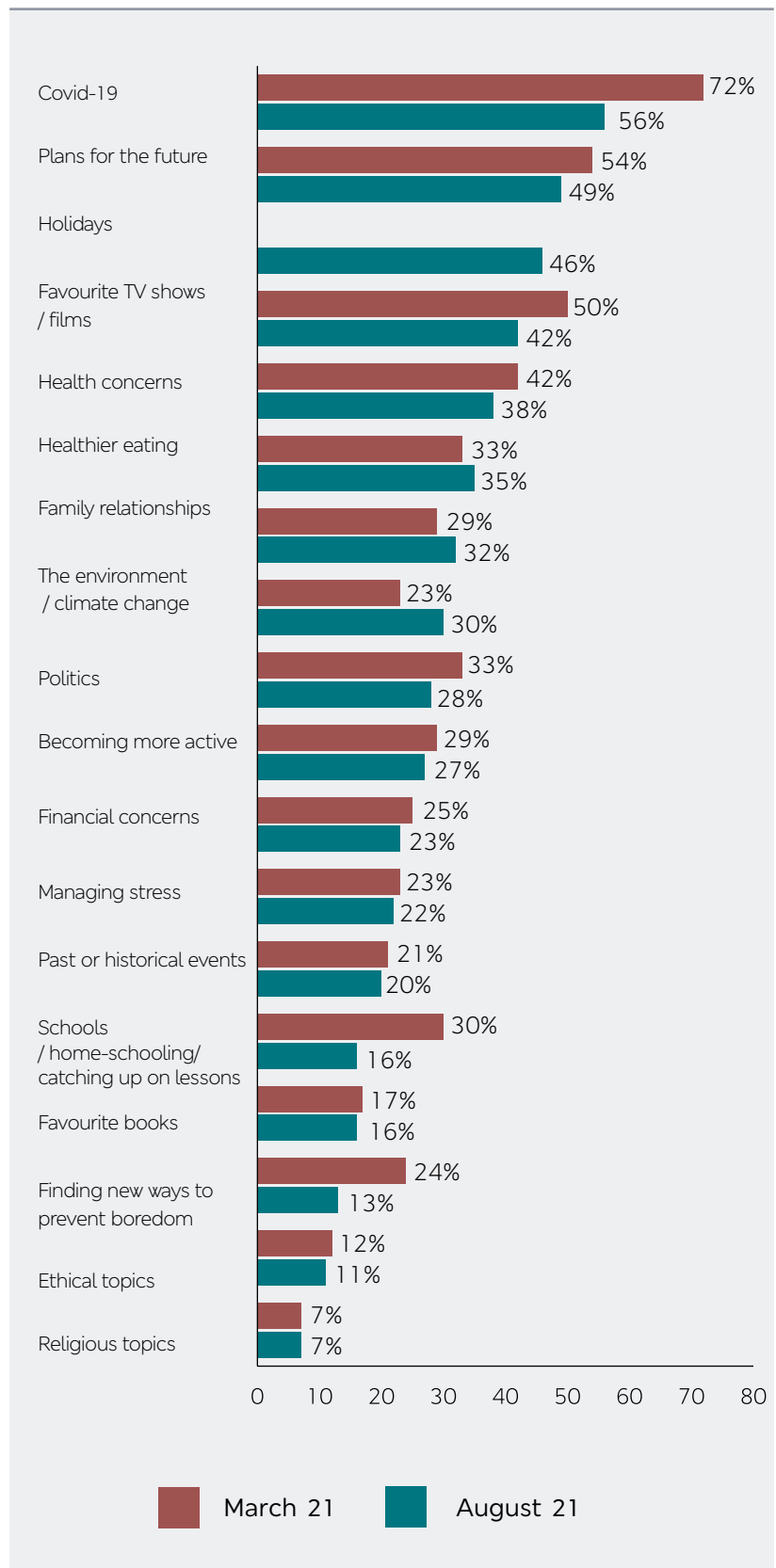
The lifting of Covid-19 restrictions, enabling many more people to go out and about and socialise with friends and each other, has resulted in far fewer families having conversations about ways to prevent boredom, which a quarter of families were talking about at the time of the first poll, but only one in eight families now.

The fastest growing topics families are talking about healthier eating, family relationships and environmental issues.

As one would expect there are fewer conversations being had about children's home schooling (down from 30% to 16% overall and from around 70% to around 40% among parents of school-age children, among whom it now ranks as 5th or 6th most common topic of conversation, compared with by far the most common topic in March). It will be interesting to see whether, in the next M&S Family Matters report, this concern about children and their education continues to decline as a concern, or if it rises again in salience for families.



WHICH OF THE FOLLOWING HAVE YOU BEEN TALKING ABOUT IN YOUR FAMILY?

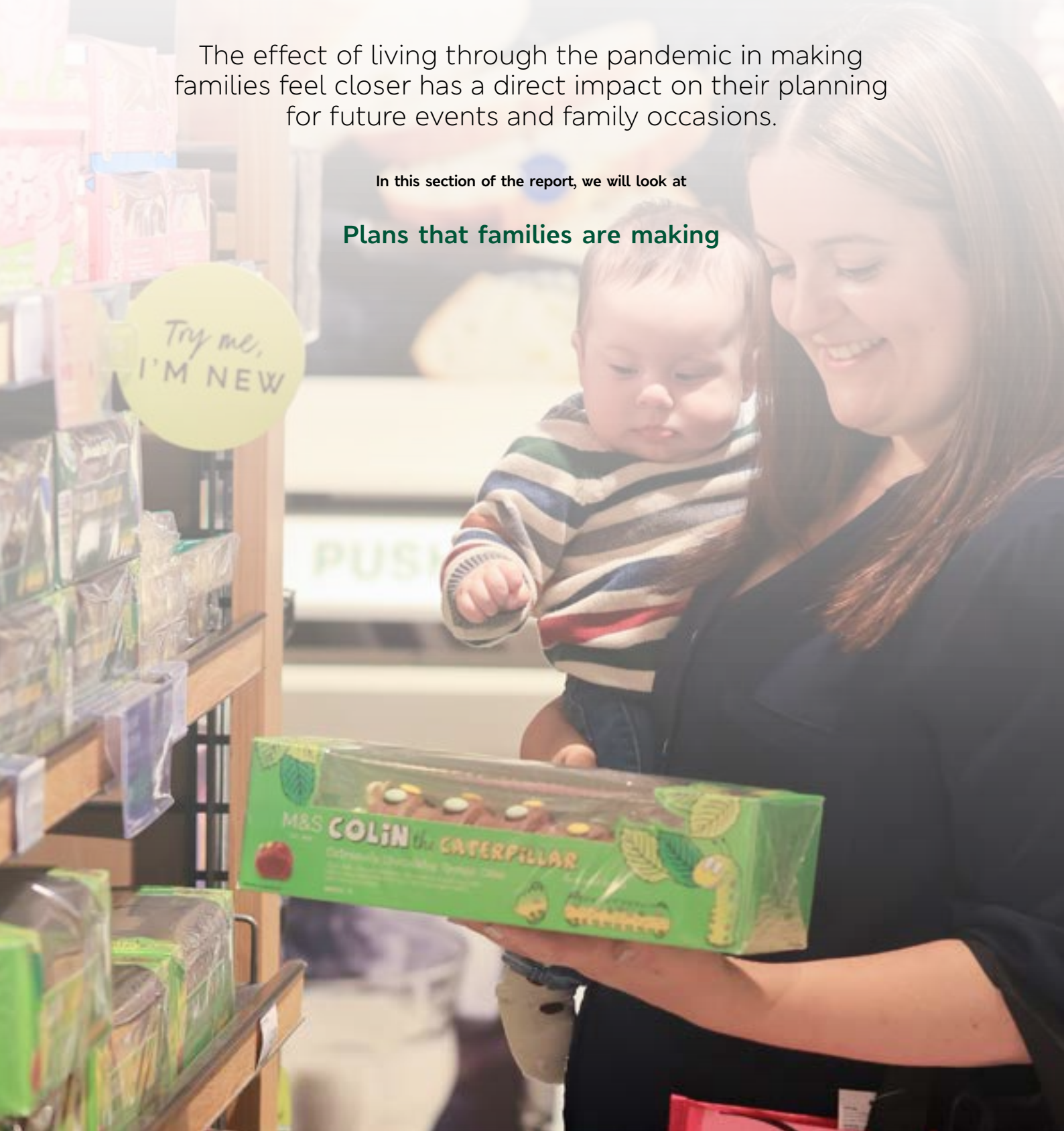


2. FAMILY EVENTS (& FAMILY CHRISTMAS)

The effect of living through the pandemic in making families feel closer has a direct impact on their planning for future events and family occasions.

In this section of the report, we will look at

Plans that families are making



Plans that families are making

The M&S Family Matters poll finds that families will do more in future to celebrate special occasions than they did before Covid-19. This is true of religious faith occasions – Christmas (which 39% say they will do more to celebrate than before), Easter, Eid al-Fitr, Diwali and Hannukah, as well as the Chinese New Year. One in three say they will do more in future to celebrate family birthdays, and more than one in five say this of New Year’s Eve and relationship anniversaries. In every case,

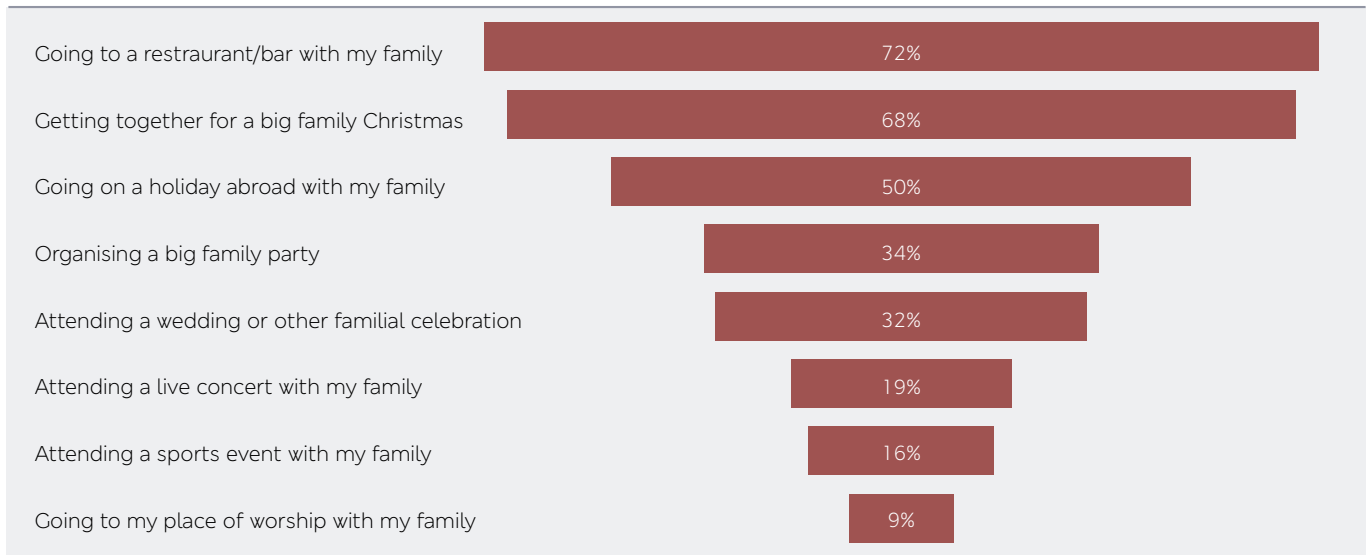
women, younger people and people from ethnic minority communities are more likely to say this. Very few people say that they will do less to mark such occasions than before.

The widespread significance of Christmas for families is further reflected in the fact that it ranks second in the list of things that people have ‘most been looking forward to doing together as a family, which haven’t been possible because of Covid-19’, just behind ‘going to a bar or restaurant with my family’. Half of

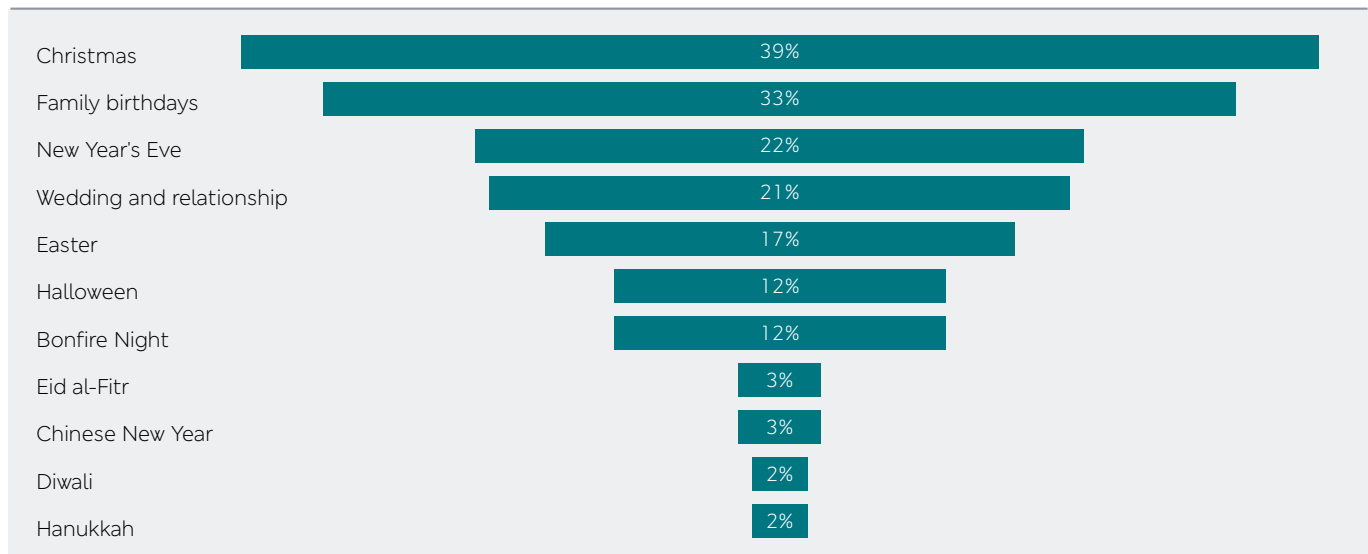
people include ‘going on a holiday abroad with my family’ among the top three things they have been most looking forward to doing.

Many families are particularly focusing on Christmas as being an especially important family occasion this year. More than half say that it will be ‘extra special’ in 2021 because of what we’ve been through, with family Christmas gatherings effectively cancelled last year.

% SAYING THIS IS ONE OF THE TOP 3 THINGS THEY’RE LOOKING FORWARD TO DOING AS A FAMILY, THAT HASN’T BEEN POSSIBLE BECAUSE OF COVID-19 RESTRICTIONS



% SAYING THEY WILL DO MORE TO CELEBRATE EACH OCCASION THAN BEFORE COVID-19



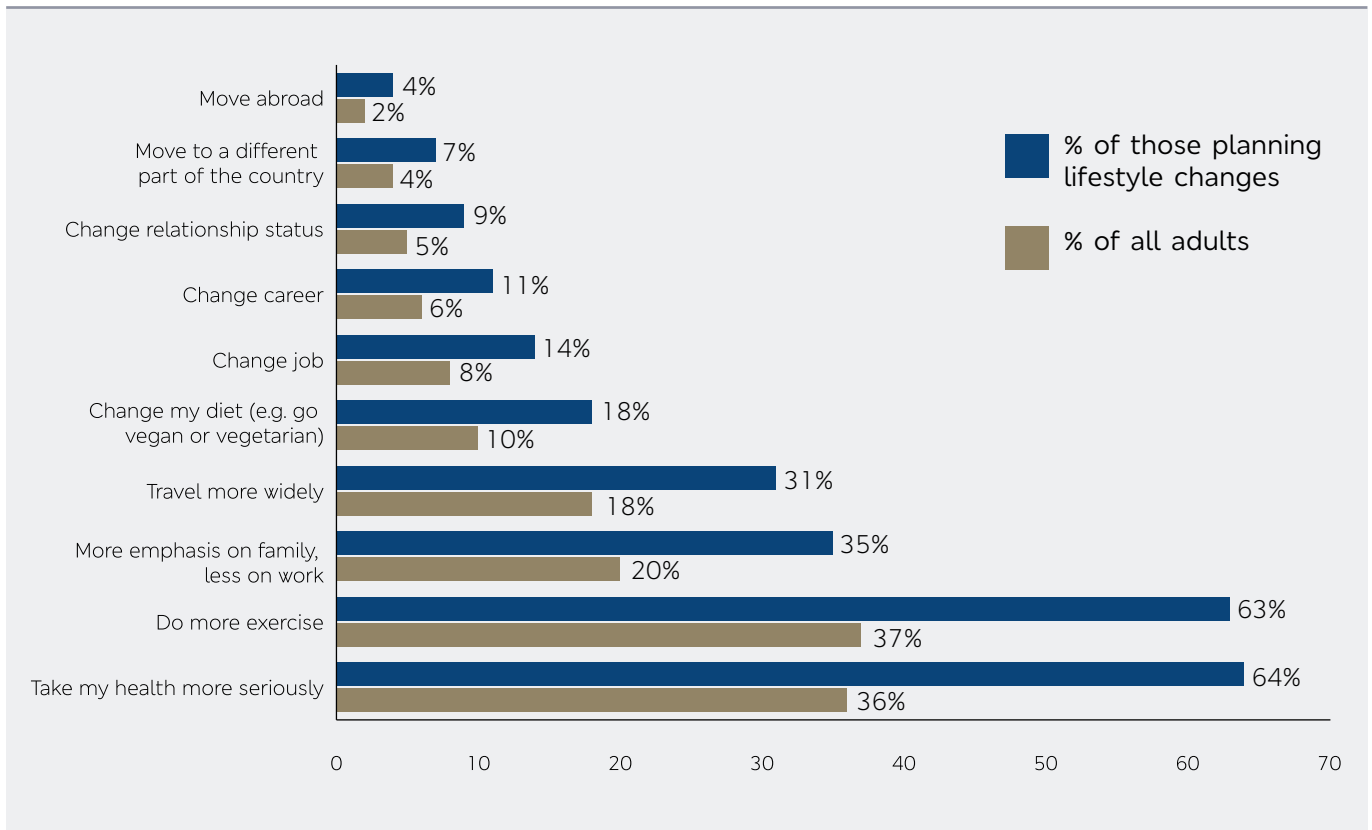
3. COVID-19: A CATALYST FOR LIFESTYLE CHANGE

The lifting of lockdown, relaxing of social distancing laws and life starting to return more to normal, has caused many people in the UK to think about their overall situation, their work, their health and their relationships with family and others. The M&S Family Matters poll strikingly reveals that living through the pandemic and all the restrictions it brought has been a watershed experience for most people.

In this section, we will look at

The lifestyle changes people are planning to make





58%
of people say living through Covid-19 has made them “reflect on where they were with their life” and are, as a result, “planning major changes as we come out of Covid-19”

64%
of people say they will now take their health more seriously than before

2/3
of people in work say they plan to make major changes

The lifestyle changes people are planning to make

Nearly 3 in 5 people across the UK (58%) – representing more than 30 million adults - say that living through Covid-19 has made them “reflect on where they were with their life” and are, as a result, “planning major changes as we come out of Covid-19”. Two thirds of those in full-time work say this. Women (62%) are even more likely than men (52%) to say this, and younger people even more likely to do so than older people (72% of 18-24s, 71% of students).

Among those saying they are planning major post-Covid-19 lifestyle changes, health and fitness emerge as the most dominant themes, with 64% of these people saying they will now take their health more seriously than before and 63% that they will do more exercise. It will be interesting to track, in future M&S Family Matters reports, the extent to which families follow through and maintain this determination.

Strengthened feelings about the importance of families, which this research has clearly established as a consequence of Covid-19, are reflected in more than a third of those who are planning lifestyle changes – and more than 40% of people in work who are planning such changes – saying that

‘more emphasis on family’ is the lifestyle change they plan to make.

Changes in diet and in job or career are the other major themes of the post-Covid-19 lifestyle changes that people are planning: around one in five (18%) are planning to change their diet (e.g. go vegetarian or vegan), 1 in 7 (14%) to change job and 1 in 9 (11%) to change career.

Two thirds of people in work say they plan to make major changes, of whom around 25% (representing around 1 in 6 of all people in work) say that they plan to change their job or career, after reflecting on where they were in their life because of living through Covid-19.



4. FAMILY CONCERNS

Living through the pandemic has had an impact on how people feel about issues that concern them.

In this section of the report, we will look at

- a) Concerns about finances**
- b) Concerns about health**
- c) Concerns about the environment**



a) Concerns about finances

The number of people concerned about the short-term or long-term financial position of their family has increased fractionally since March (to 30% and 37% respectively) but that is still somewhat lower than the number of people concerned about health, division and inequality in society or the environment.

Women are more likely than men to be worried about their family's financial position.

b) Concerns about health

With the worst of the pandemic hopefully behind us, there has been a drop in concern about family health,

although around half of people are still worried about this. Women are more likely than men to be worried about their family's health and younger people significantly more likely to do so than older people.

Among the half of adults who are worried about their family's health, many are concerned about a resurgence of Covid-19 and about the risk of future pandemics.

The most prevalent health-related concerns, however, are now focused on the resources of the NHS: nearly two thirds overall are now worried about the general availability of health services – and this concern is shared similarly

among different demographic groups. Among the half of people who are worried about their family's health, the two biggest specific concerns are 'longer waiting times because of Covid-19' (59%) and 'pressure on the NHS' (58%); 50% are worried about not being able to see a doctor for non-Covid-19 issues.

% of all UK adults who are concerned...	Mar-21	Aug-21
I am concerned about the availability of health services	58%	65%
I am worried about how environmental damage will affect future generations of my family	61%	64%
I am worried about the divisions in our country	60%	59%
I am worried about inequality in society	54%	55%
I am worried about the health of my family	56%	51%
I am worried about my children's future job prospects	53%	48%
I am concerned about the availability of social services	40%	45%
I am worried who will look after my family if something bad happens to me	42%	38%
I am concerned my children are missing out chances to develop	44%	37%
I am worried about my children's education	37%	33%
I am concerned I will not be able to care for my family	30%	26%
I am worried about my family getting nutritious food	22%	23%
I am worried about keeping a roof over my head	20%	19%
I am worried about being able to put food on the table	17%	18%



c) Concerns about the environment

As we found in the first M&S Family Matters report, concern about the environment ranked nearly as high as health concerns. While concern about other bigger picture societal issues has not significantly changed since the first poll, concern about the environment has increased slightly (from 61% to 64%) – and it is a more prevalent topic of family discussion than in the benchmark poll (up from 23% to 30% - the biggest increase for any topic of conversation). This concern is also reflected similarly across different demographic groups.

This concern about the environment is reflected in a very large consensus (78% agree/4% disagree) that big business should 'take a lead in doing everything they can to address climate change'. It is also reflected in people's priorities and choices as consumers. Nearly half (48%) say they 'make an effort to be an educated consumer when it comes to how businesses are responding to climate change'. Well over half (57%) say

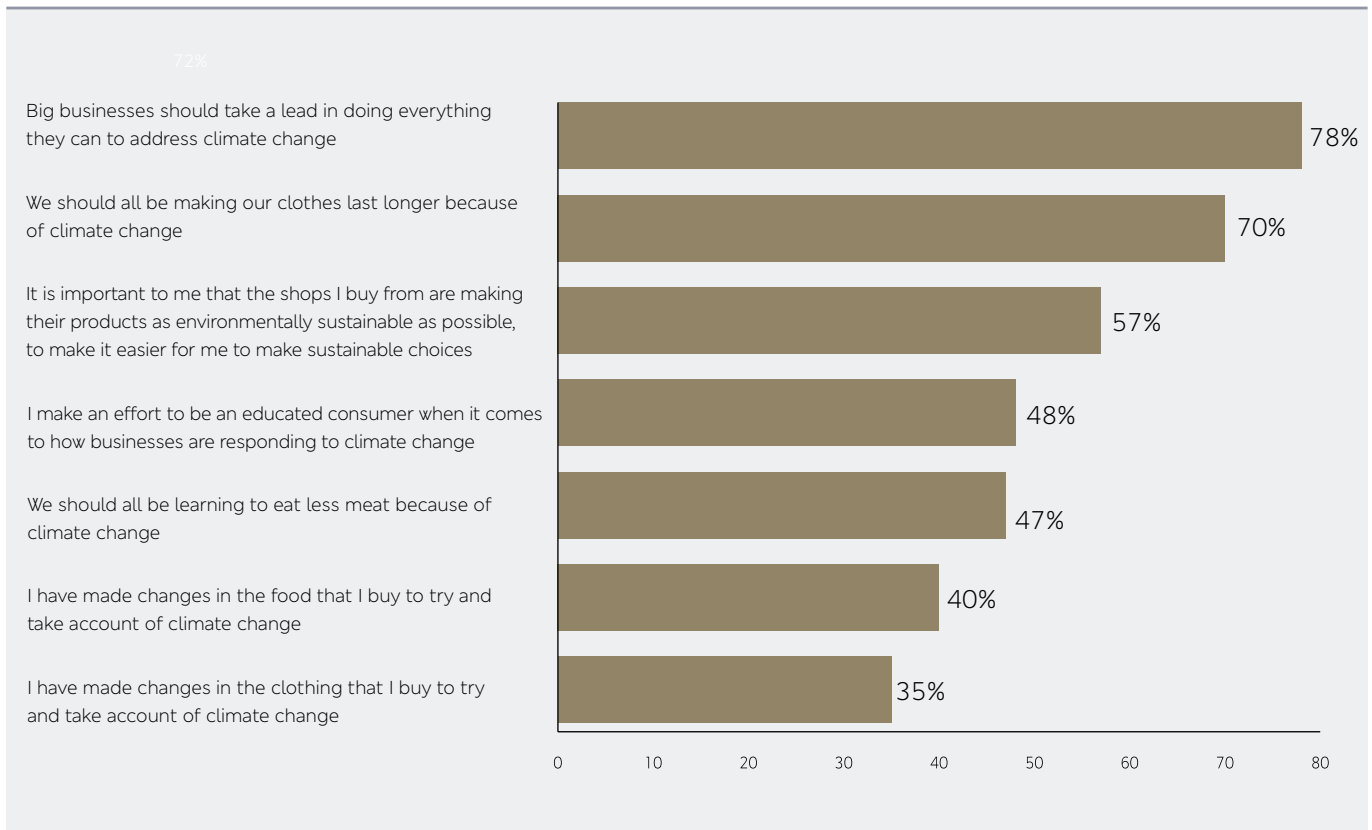
it is important to them that shops they buy from make products as environmentally sustainable as possible.

70% say that 'we should all be making our clothes last longer' because of climate change. 47% that 'we should all be learning to eat less meat because of climate change'. There is very little variation in view between different demographic groups or regions when it comes to making clothes last longer, but younger people and those living in London are considerably more likely than others to think we should learn to eat less meat.

Two in five say they have already made changes in the food they buy because of climate change and more than a third overall say this of the clothing they buy. Women are significantly more likely to do so than men, younger people much more likely to do so than older people (half of 18-24s say it, but only a third of over-65s), and those living in London and the south of England markedly more likely to do so than people living in other parts of the UK.

70%

say that 'we should all be making our clothes last longer because of climate change'



CONCLUSION

This second quarterly M&S Family Matters report follows up the themes emerging from the first report, launched in July. It vividly captures how living through Covid has affected the outlook of families across the UK and its impact on their plans and priorities.

The experience of lockdown has made families and family moments matter more to most people. In the near term, that means that upcoming family events have acquired special significance because Covid restrictions made it impossible to celebrate them properly over the last year. This research particularly identifies Christmas as a major focal point for many. Millions of families are planning bigger and better Christmas celebrations than ever before and for many a big family gathering over Christmas is, of all the things that Covid made impossible, the one they now most look forward to.

This report also reveals that the experience of the pandemic has changed people's horizons in longer term and more fundamental ways. Most of us – across all different demographic groups, across the country and in all the varieties, shapes and sizes of family – have been caused to reflect on our lives by the unprecedented context of Covid. In various ways, many millions of people say they are planning changes to their lifestyle as a result. For many the new priority is health and fitness – which in some cases means changing diet. For others it is a better work life balance, which in turn leads many to have decided to move house or to change their job or career. The latest UK official statistics report the highest ever number of job vacancies around the country. This M&S Family Matters research helps to explain why.

It is equally striking that as the UK started to put Covid restrictions behind us, with work, social lives and family activities all starting to return to something a bit more like normal, many people are increasingly concerned about sustainability. This M&S Family Matters report finds an overwhelming among families that businesses should be doing everything they can to address climate change and a clear majority wanting shops to ensure products are as sustainable as possible. M&S as a business takes sincerely to heart the striking finding that most people also want their clothes to last longer and see this as one of the changes demanded by climate change. Many say they have already started to change their shopping habits and preferences in response to climate change. We will continue to track how these attitudes and behaviours change in the months and years ahead.

METHODOLOGY & SAMPLE

Yonder interviewed 5,019 adults online between 4th and 11th August 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 $\pm 1.4\%$. Analysis of demographic sub-groups is based on a minimum sample of 100.