

The Sainsbury's Living Well Index

A landmark study carried out by Oxford Economics
and the National Centre for Social Research

Contents

03	1 Foreword
04	2 Overview
04	2.1 Highlights of the new research
05	2.2 The four key factors behind our 'wellbeing gap'
06	3 Analysis of new findings
06	3.1 The reduction in our Living Well score
08	3.2 New insights from stage two research
14	4 The Living Well gap
14	4.1 What stops people achieving a higher wellbeing score?
15	4.2 In focus: Why having enough time is key to living well
20	4.3 In focus: The increased importance of social eating



1. Foreword

Helping our customers live well for less has always been at the heart of our business.

That's why last year we launched the Sainsbury's Living Well Index, to understand what 'living well' means to people across the UK today and to track how that picture changes over time.

We want to draw on these regular findings to engage more actively on areas where we can help people live better day to day. As we transform our business, we are using the insights to focus on giving households more of what they want now and in the future.

This second wave of the Index reveals an overall drop in how well British households are living. And while some of this drop is purely seasonal, we can also see that a growing number of us – particularly young people and families – are more worried about money and the growing cost of living than we were six months ago. As a retailer, this is an area where we can play a role as we invest to lower our prices.

The good news is that many of the factors affecting how well we're all living are within our control. Nothing beats the power of simple human interaction. Spending more time with people face to face, rather than communicating via phones, can really help to improve how well we're living. It was striking to me that something as simple as how often we sit down and share a meal with someone can make a real difference to our wellbeing. We could all feel better if we made more time to get together, eat together and share together.

Mike Coupe, Group CEO, Sainsbury's

2. Overview

Sainsbury's launched its Living Well Index in September last year, in collaboration with Oxford Economics and the National Centre for Social Research. This regularly-updated index provides a unique insight into the nation's mood, and people's views of how 'well' they are living.

The Living Well Index is founded on high-quality survey data collected from more than 8,000 British adults. We surveyed this same group again in January and February 2018. This latest report summarises our findings and analysis.

2.1 Highlights of the new research

Overall, the Living Well Index has fallen by 0.5 points to 60.7 since our first survey, carried out last summer. This is consistent with a slight dip in our respondents' sense of wellbeing.¹

Our analysis suggests much of this decrease was down to seasonal factors. In particular, the chillier weather prompted adults to spend less of their leisure time outside and to socialise less often – both with their friends and family, and with their neighbours. We also picked up a decline in satisfaction with public transport, perhaps because the colder weather contributed to increased delays and cancellations.

Together, these four seasonal factors contributed to a 0.6 point fall in the Living Well Index. Other factors collectively contributed a small positive movement (of 0.1) – leading to a 0.5 point drop overall.

As part of the feedback gathered from our Advisory Group and the Living Well Forum held in September 2017, we made some revisions to our survey questionnaire for the second stage of research. These changes meant we were able to confirm our original findings and analysis, while adding new insights that enhance the Living Well Index.



The Living Well Index has fallen by 0.5 points to 60.7, mostly due to seasonal factors.

¹ The 60.7 figure reflects the average Living Well Index score based on the second wave of survey data and using the revised Living Well model. In our first report, the average Living Well Index score was 62.2. The difference (-1.5 points) reflects both changes in responses to our survey and changes to the living well model. To establish the trend-change in living well, we only want to focus on the former. Running our original living well model on the new data implies a fall in the Living Well Index average score of 0.5 points (from 62.2 to 61.7).

2.2 The four key factors behind our 'Living Well gap'

Building on the findings of our stage one report, our new analysis identifies four key factors that together explain almost half of the difference between the current Living Well Index score of 60.7, and the 100-point maximum: sleep quality, sex life satisfaction, feeling like you have enough time and social eating. We refer to this as the nation's 'Living Well gap'.

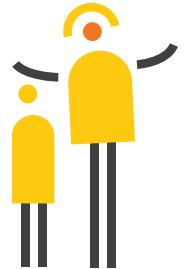
Of these factors, two have been highlighted by revisions to our analytical approach in this second phase: feeling like we have enough time and social eating. Our analysis shows that these two factors, together, accounted for more than 15 per cent of the national Living Well gap.

Sleep quality: In our first research stage, we discovered that getting enough sleep was the most important factor determining whether people feel like they are living well. Our second research stage has re-confirmed that sleep quality is at the top of the list for ensuring people's wellbeing.

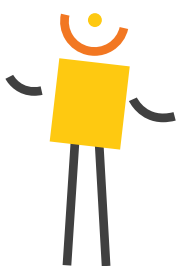
Sex life satisfaction: Also highlighted in our first research stage, our new analysis re-confirmed sex life satisfaction as the second most important factor for people to feel like they are living well.

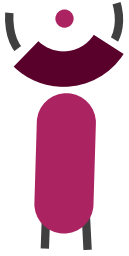
A sense of having enough time: People feeling that they have enough time is critical to their sense of living well. Those who strongly agreed they had 'enough time to do everything' were 8.1 points better off than those who strongly disagreed with this, all else equal.

Social eating: Using a new survey question to track social eating habits, we discovered a strong link with wellbeing. Everything else equal, someone who 'never' sits down to eat alone had a living well score 7.9 points higher than someone reporting that they 'always' ate their sit-down meals alone.



The two new factors we identified, feeling like you have enough time and social eating, together account for **15 per cent of the national Living Well gap.**





3. Analysis of new findings

3.1 Winter is to blame for the reduction in our Living Well score

The Living Well Index measures how we live as a society, giving us an average Living Well score that represents the British population. Our average score has dropped to 60.7, compared to 61.2 last summer.

The nation's slightly less optimistic mood is consistent with the reported change in wellbeing during this period: the average level of wellbeing (a cumulative measure of happiness, satisfaction, self-worth and anxiety) in our survey dropped by 0.5 points on a 0-100 scale between our first and second research stages. Our analysis points to the season and colder weather being to blame, as this prompted changes in behaviour and routines that were associated with the respondents' sense of wellbeing.

For example, the share of adults who managed to get outdoors at least once a week declined from 56 per cent to 48 per cent, compared to the first research stage. This decrease can explain almost half of the total recorded fall in the Living Well Index score since it launched last September.

Similar seasonal trends were apparent in other aspects of the Living Well Index. As a nation, we met friends and family less frequently, and chatted to our neighbours less often. As the cold weather pushed up the frequency of train delays and cancellations, people's level of satisfaction with the quality of their local transport links also fell. According to our latest data, 21 per cent of adults were dissatisfied with the quality of their local public transport – a four per centage-point increase since our first report.

Together, these four seasonal factors contributed to a 0.6 point fall in the Living Well Index. Other factors collectively contributed a small positive movement (of 0.1) – leading to a 0.5 point drop overall (Fig. 1).

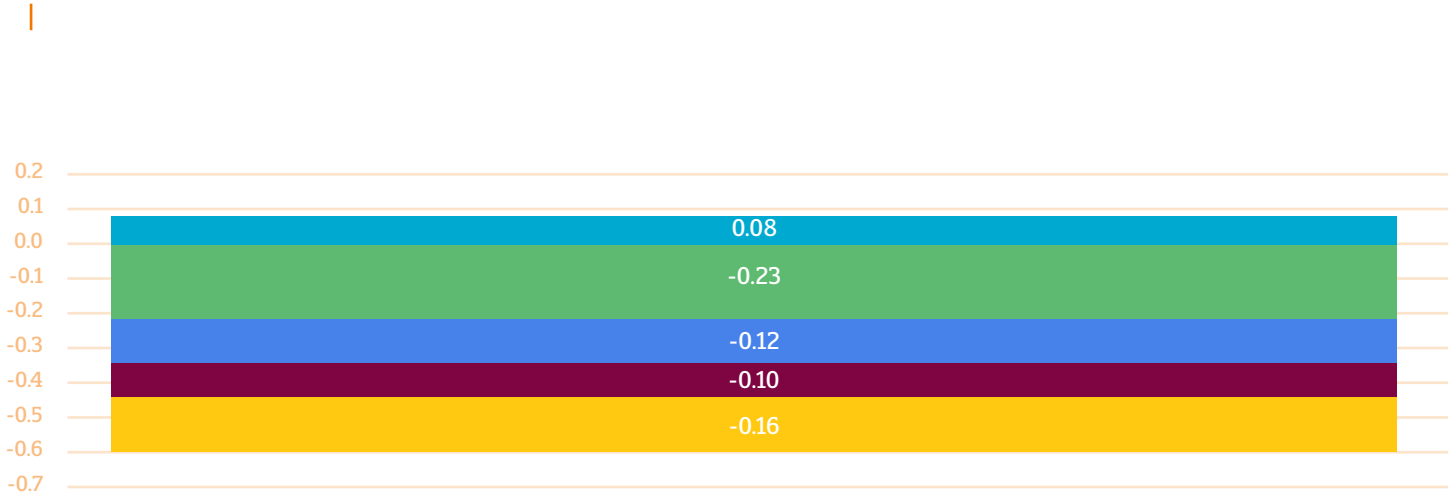


Compared to our last survey, the number of adults who managed to get outdoors at least once a week **dropped by 8 per cent**, and the number who were dissatisfied with the quality of their local public transport grew **by 4 per cent**.

Fig. 1. Breakdown of change in national average Living Well Index score

- Other
- Spending time outdoors
- Transport links
- Meeting friends and family
- Chatting to neighbours

Contribution to change in Living Well Index score, 0-100 scale



Source: Oxford Economics analysis based on NatCen data

Exploring other issues affecting our wellbeing

This research has uncovered other important issues that, while not as statistically impressive, are still impacting the nation’s wellbeing. These aren’t covered in this report, but we are working with partners who are helping us draw attention to these matters and work to improve the situation for those who are impacted. For example, we found that 19 per cent of our respondents are intensely worried about their finances – a 2 percentage point increase compared to our last survey. This reflected a squeeze on incomes, as the median level of disposable income of our sample group declined by 0.5 per cent, after accounting for inflation, in this time. Parents have felt the impact most – with 23.5 per cent of them saying they felt intensely worried about money or debt, compared to 20.4 per cent in our stage one research.



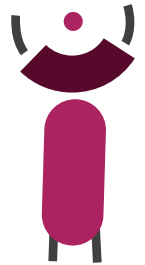
One in five respondents reported feeling ‘intensely worried’ about their finances.

3.2 New insights from Stage Two research

Throughout our research, we have worked with an Advisory Group comprising of academics and other stakeholders to ensure a gold-standard quality of research. As part of the feedback gathered from our Advisory Group and the Living Well Forum held in September 2017, we made some revisions to our survey questionnaire for the second stage of research.

This has allowed us to generate new insights that enhance the Living Well Index model, with new factors that drive our wellbeing. At the same time, we can confirm the major drivers of wellbeing that we discovered last time remained stable. The quality of a person's sleep still has the strongest association with wellbeing, all else equal. In addition, the coefficient range between the best- and worst-case outcome for other major drivers of wellbeing, such as sex life satisfaction, the strength of someone's support network, and economic activity, remained similar.

Fig. 2 illustrates the range of coefficients for each indicator in the Living Well Index model from the best- to the worst-case outcome, according to its association with our wellbeing (all else being equal). The range is reported compared to the median response to each question – so, for example, the median response to our survey was that people felt rested after sleep 'some of the time'. Compared to this answer, those who feel rested after sleep 'all the time' had a wellbeing score that was 0.93 points higher (all else equal) on a 0-10 scale, as shown by the orange line. Conversely, those who 'never' felt rested after sleep reported a wellbeing score 0.51 points lower, controlling for other factors—the width of the plum line.



The quality of a person's sleep still has the strongest association with wellbeing.

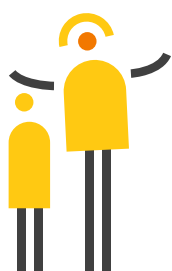
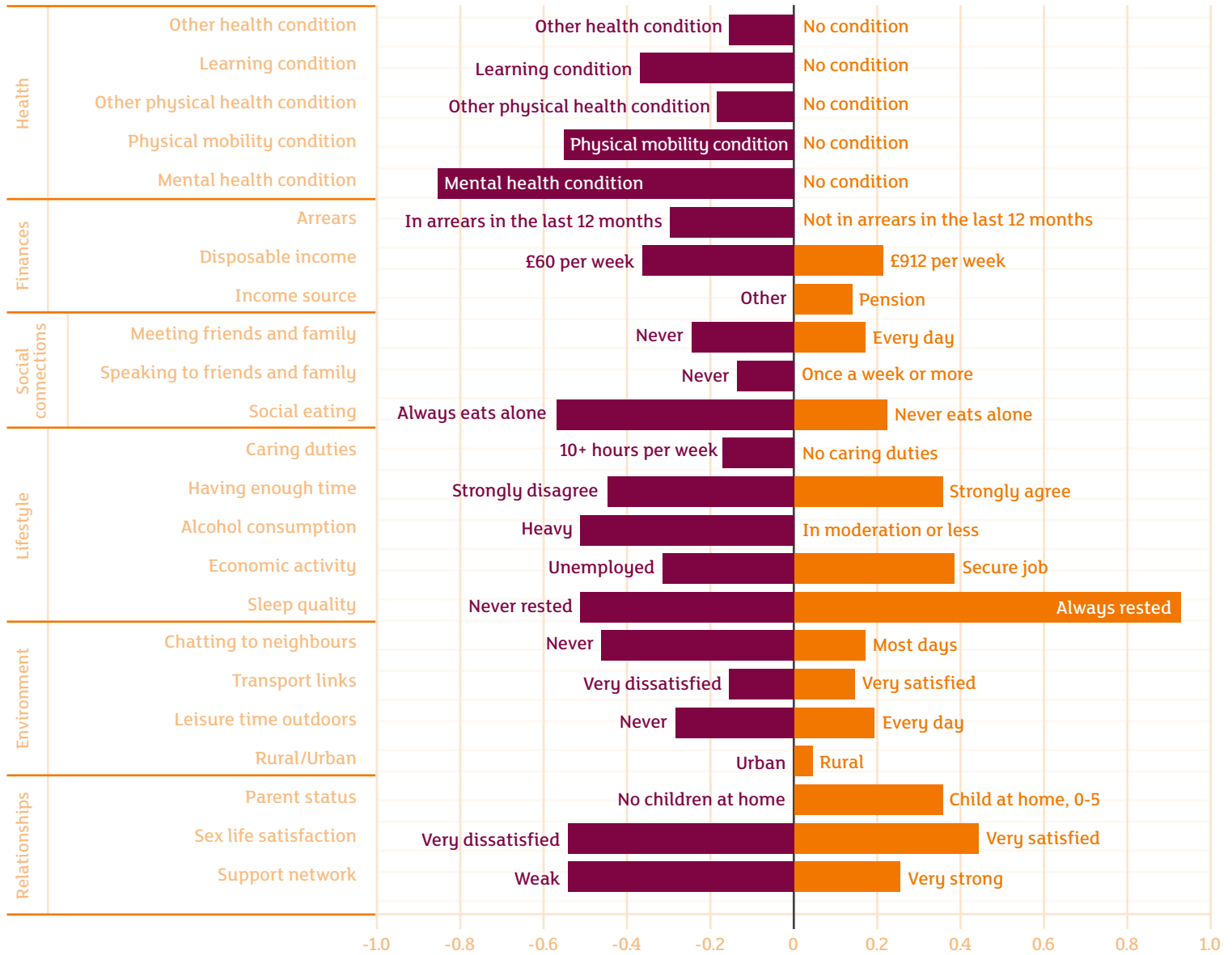


Fig. 2. Impact of living well indicators

Themes and related indicators



Contribution to wellbeing vs median question response, 0-10 scale

Source: Oxford Economics

How our health impacts our wellbeing

Our new analysis shows that a hierarchy exists for health conditions that affect our wellbeing, with mental health conditions being the most significant factor.

We collected objective information on people's health in our revised survey. Our new analysis indicates that suffering from a mental health condition is more strongly (negatively) associated with wellbeing than other health conditions: those with a mental health condition scored 8.5 points lower on the Living Well Index, all else equal.

The implications of reporting other health issues – including 'physical mobility' (-5.4); 'learning condition' (-3.7); 'other physical condition' (-1.7); and 'other condition' (-1.6) – were, separately, more modest.

The importance of 'real' social interactions

Our analysis shows that 'real' social connections are essential to living well – and that digital interactions are no substitute.

As part of our second stage research, we tested how different methods of connecting with other people impacted our wellbeing. How often we meet and speak to friends and family, interact meaningfully with our neighbours, and sit down to eat socially – as well as the quality of our sex life – are all shown to be connection methods that have a positive association with wellbeing, controlling for other factors (though causality isn't clear). In contrast, there was no association, either positive or negative, between wellbeing and digital forms of interaction (via email and text message or with social media consumption), all else equal.

The research highlights significant variations in social connections according to respondents' life stages (see Fig. 3). This also points to associations between social connectedness and socioeconomic characteristics.

The best socially connected group is Young Families. For these four indicators, these parents of young children (0-5 years old) have an average Living Well score 1.2 points above the national average. Principally, this reflected well-above-average levels of sex life satisfaction and a greater likelihood to eat socially.

Baby Boomers, whether working or not, scored slightly higher than average on social connection indicators – mostly due to their neighbourly interactions. Around one-in-five Baby Boomers chat to their neighbours 'most of the time', compared to less than one-in-10 adults from younger generations. On average, however, Baby Boomers are less satisfied with their sex lives – a factor that is strongly negatively associated with age.

The worst socially connected group is Child-free Generation X (ages 35-54), which scored 1.6 points below the national average. This group's score was driven by a social (rather than resource) deficit: they are not notably worse off in terms of finances, health, or time, but they scored poorly on all social indicators.



People reporting a mental health condition scored **8.5 points lower** on the Living Well Index.

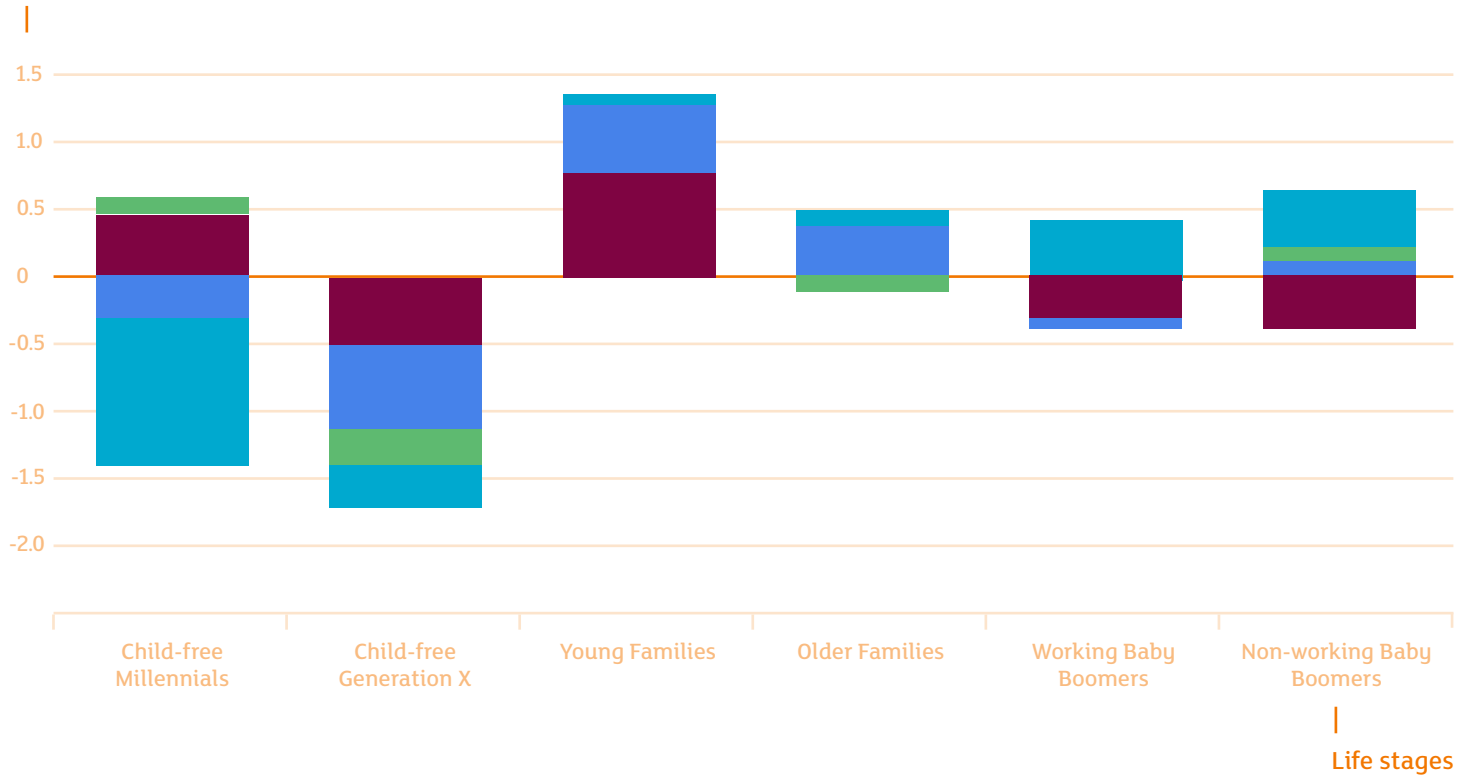


There was no association, either positive or negative, between wellbeing and digital forms of interaction.

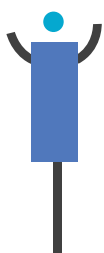
Fig. 3. Life stage scores for social interaction variables vs national average

- Chatting to neighbours
- Meeting/speaking to friends and family
- Eating socially
- Sex life

Difference compared to Living Well Index national average (0-100 scale)



Source: Oxford Economics

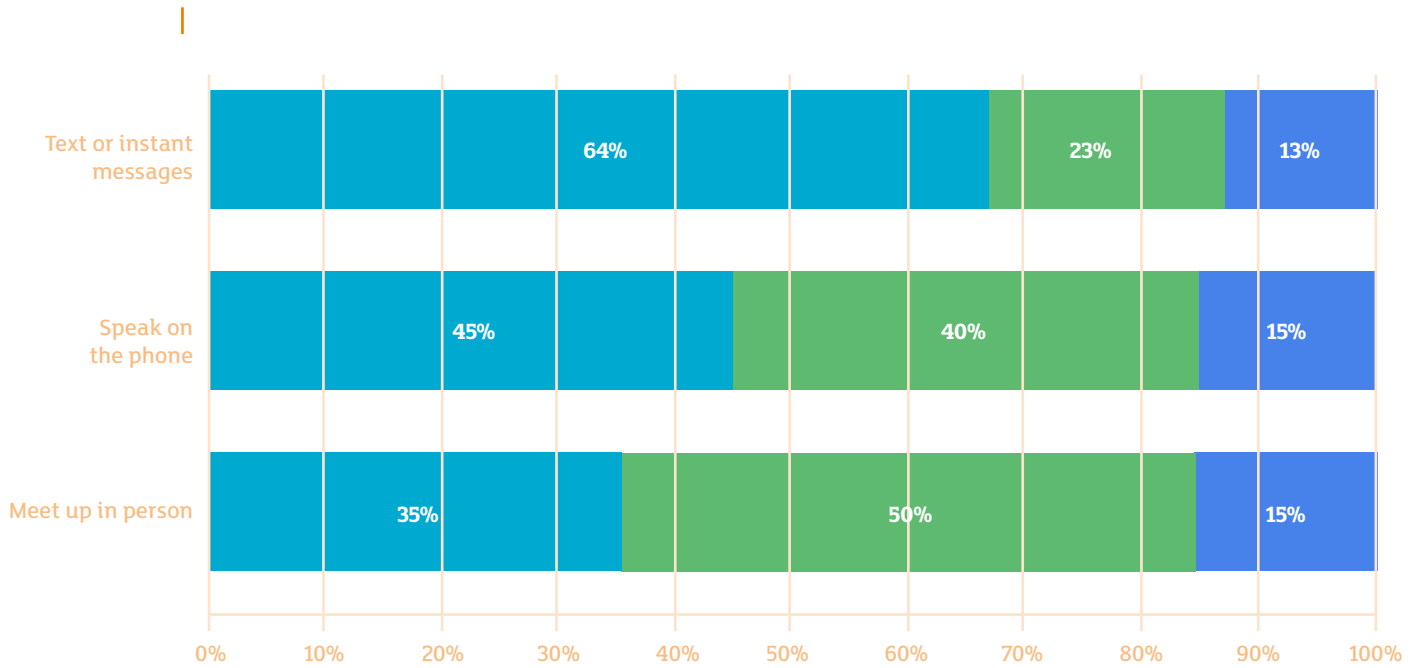


Unsurprisingly, our research confirms that digital connections are much more common across the nation than personal interactions. For example, the new survey found that adults are almost twice as likely to interact ‘several times a week or more’ with friends and family they don’t live with via text or instant message, than by meeting up with them in person.

Fig. 4. Distribution of survey responses to the question: ‘How often do you personally contact family members and friends, excluding those you live with?’

- Several times a week or more
- Between once a month and once a week
- Less than once a month

Share of respondents by frequency of interacting with friends and family by medium



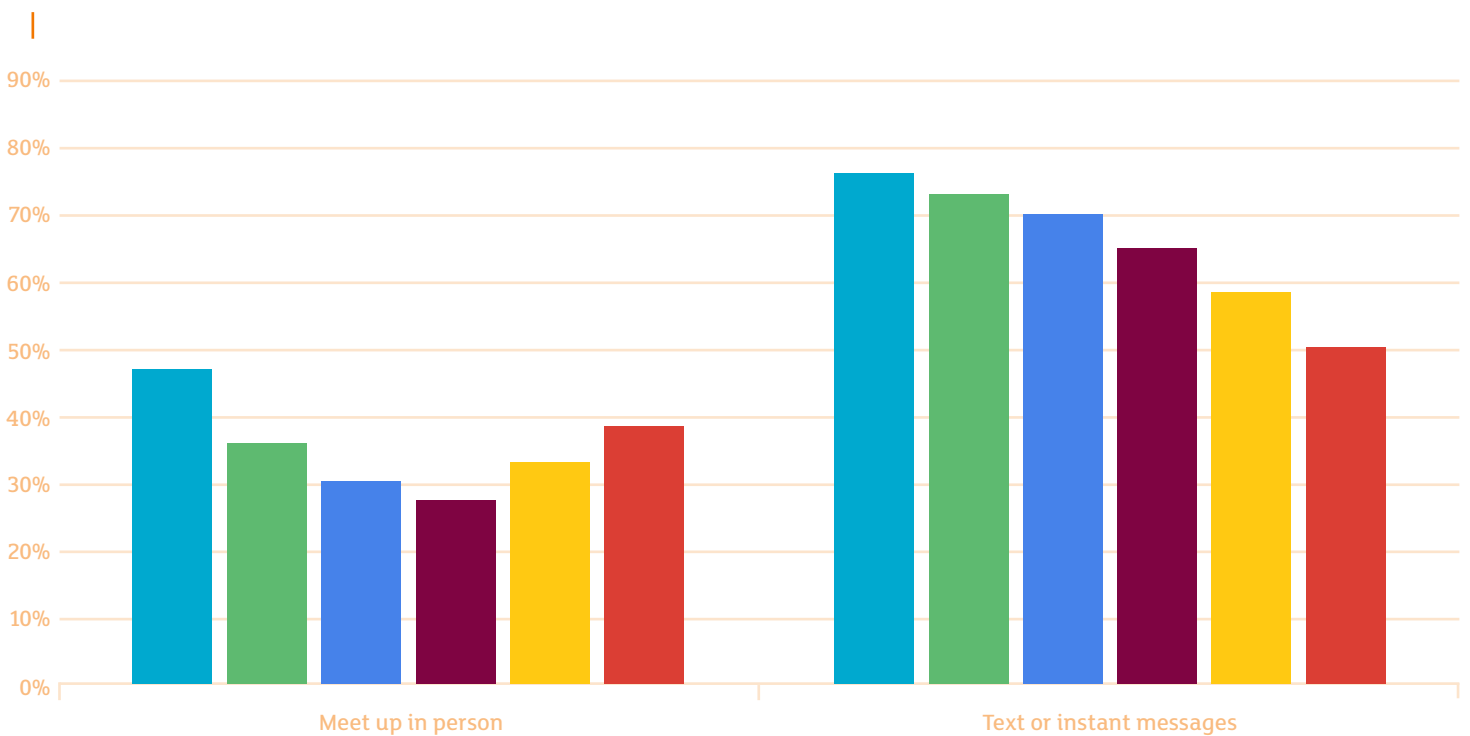
Source: Oxford Economics analysis of NatCen data

But again, differences exist between different age groups (Fig. 5). The pattern for regularly interacting in person with friends and family follows a U-shape when looking at respondents' ages – peaking in early-adulthood (18-24), before dropping down in middle-age, then picking up again from 55 upwards. The restrictions created by parenting and working life affect those in middle age, constraining their social interactions outside of the immediate family. In contrast, digital interactions follow a linear pattern, with regular use of text and instant messaging decreasing steadily with age.

Fig. 5. Share of respondents who interacted with friends and family several times a week or more, by medium, by age

● 18-24 ● 25-34 ● 35-44 ● 45-54 ● 55-64 ● 65+

Share of respondents who interacted with friends and family outside the home several times a week or more



Source: Oxford Economics analysis of NatCen data



4. The Living Well gap

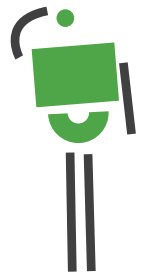
4.1 What stops people achieving a higher wellbeing score?

Our revised survey has enabled us to enhance the Living Well Index with a wider set of drivers that are linked to the nation’s wellbeing.

We now find that four factors can together explain almost half of the difference between the current average Living Well Index score of 60.7, and the 100-point maximum – the nation’s ‘Living Well gap’ (Fig. 6)

The importance of better sleep and sex life satisfaction was highlighted in our first research stage findings last year. Now, revisions to our analytical approach have identified two more factors that are also key to explaining the wellbeing gap: feeling that one has enough time and social eating.

Our analysis shows that these two factors, together, accounted for more than 15 per cent of the nation’s current Living Well gap. We now explore these two key wellbeing factors in greater detail.

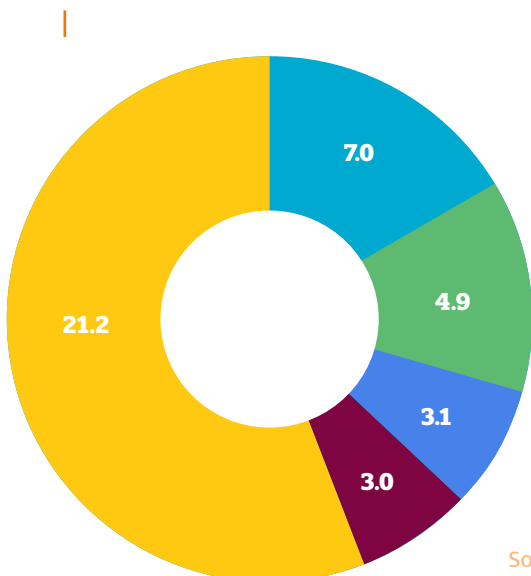


Four factors can together **explain almost half of the difference** between the current average Living Well Index score of 60.7, and the 100-point maximum.

Fig. 6. Breakdown of the nation’s Living Well gap

- Sleep quality
- Sex life
- Having enough time
- Eating socially
- Other

Contribution to total gap in nation’s Living Well Index score



Source: Oxford Economics analysis of NatCen Data

4.2 In focus: Why having enough time is key to living well

In the second research stage, we included a new set of survey questions which allowed us to gather information on people's perceptions of time and control. Using this data, our new analysis shows that feeling one has 'enough time to do everything' is important to living well.

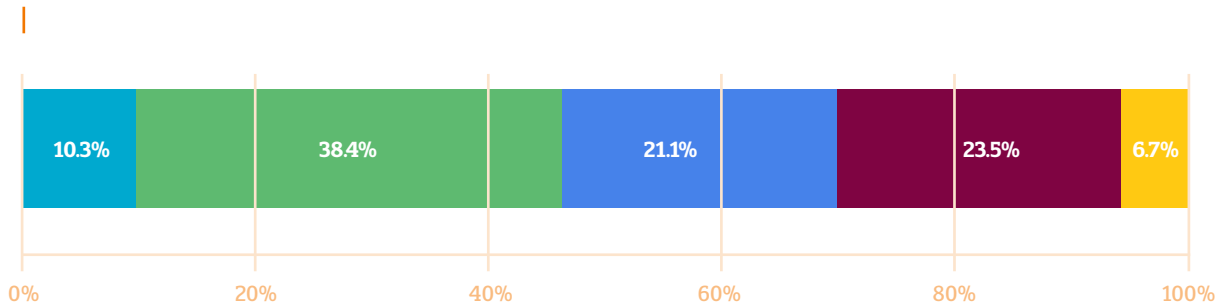
All else equal, someone who strongly agreed with the statement that they had 'enough time to do everything' had a Living Well Index score 8.1 points higher than someone who strongly disagreed with this statement. This factor is the third largest source of our Living Well gap, as shown in Fig. 6.

A common complaint is that the demands of modern life have made it increasingly difficult to 'fit everything in'. However, our data shows that such pressures are far from uniform. Indeed, more adults agree they have 'enough time to do everything' (48.7 per cent) than disagree with that statement (30.2 per cent), as shown in Fig. 7.

Fig 7. Distribution of responses by agreement with the statement: 'In general, I have enough time to do everything'



Share of respondents by frequency of interacting with friends and family by medium



Source: Oxford Economics analysis of NatCen Data



People who strongly agreed they had 'enough time to do everything' scored **8.1 points higher** than those who strongly disagreed.

How do perceptions of time link with who we are, and what we do?

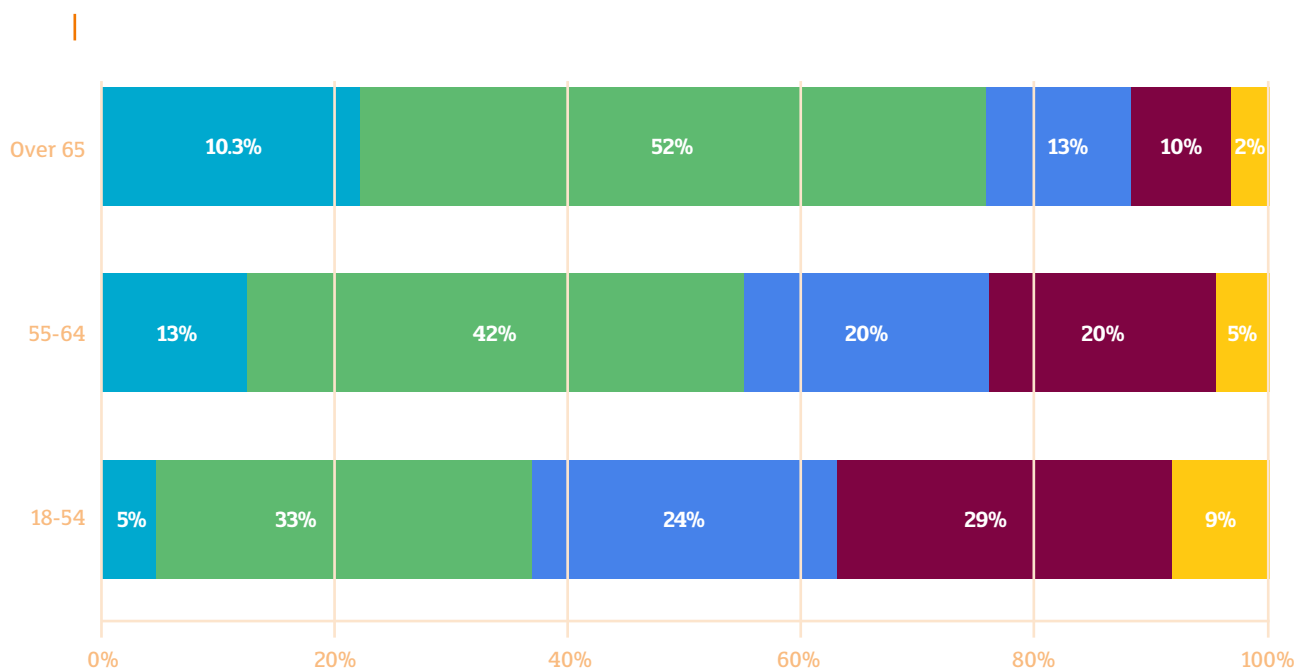
Looking more closely at the links between time and other socioeconomic and lifestyle characteristics based on our survey, we found that simple associations can't be used to identify what causes people to respond in the way they do.

The extent to which people feel that they have enough time to do everything is heavily correlated with age. Three quarters of the over-65s agreed that they had 'enough time to do everything' – a share that dropped to 55 per cent for those aged 55-64, and just 38 per cent for younger adults (see Fig. 8).

Fig. 8. Distribution of responses by agreement with the statement: 'In general, I have enough time to do everything' – by age band

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

Share of respondents by agreement that they have enough time



Source: Oxford Economics analysis of NatCen Data

Three quarters of people over 65 years old **agreed** that they had 'enough time to do everything', **compared to** just 38 per cent of younger adults.



But this strong association with age reflects wider links with economic activity and parenting responsibilities. Both of these factors are also strongly correlated with people's perceptions of whether they have enough time, and also with age.

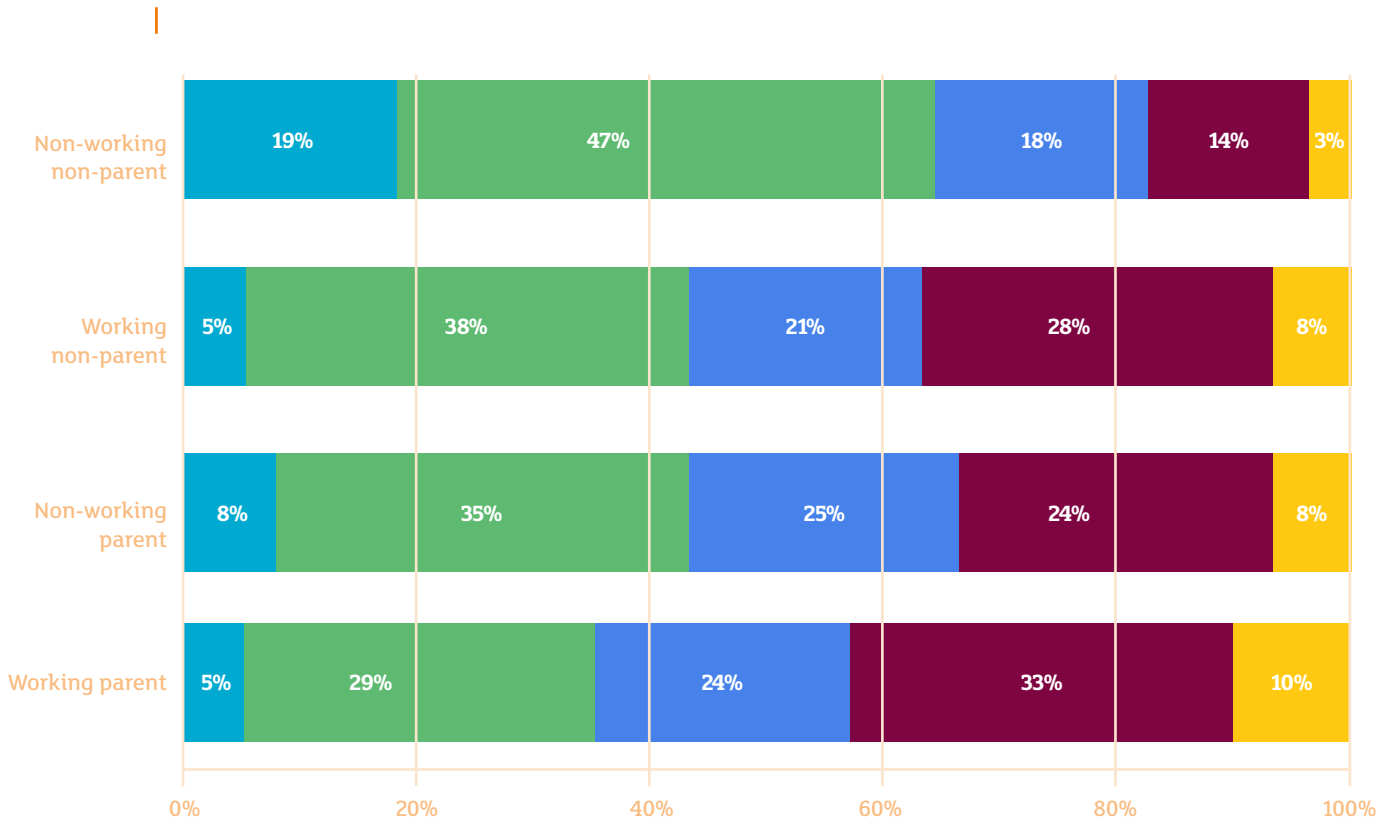
As shown in Fig. 9, working parents were least likely to feel that they have 'enough time to do everything'. Just 34 per cent of this group agreed with this statement in our survey, compared to 43 per cent who disagreed. In contrast, two thirds of non-working non-parents agreed that they had enough time, versus just 17 per cent who disagreed.

Two thirds of non-working non-parents felt they had enough time to do everything, while only 34 per cent of working parents felt the same

Fig. 9. Distribution of responses by agreement with the statement: 'In general, I have enough time to do everything' – by working and parenting status

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

Share of respondents by agreement that they have enough time

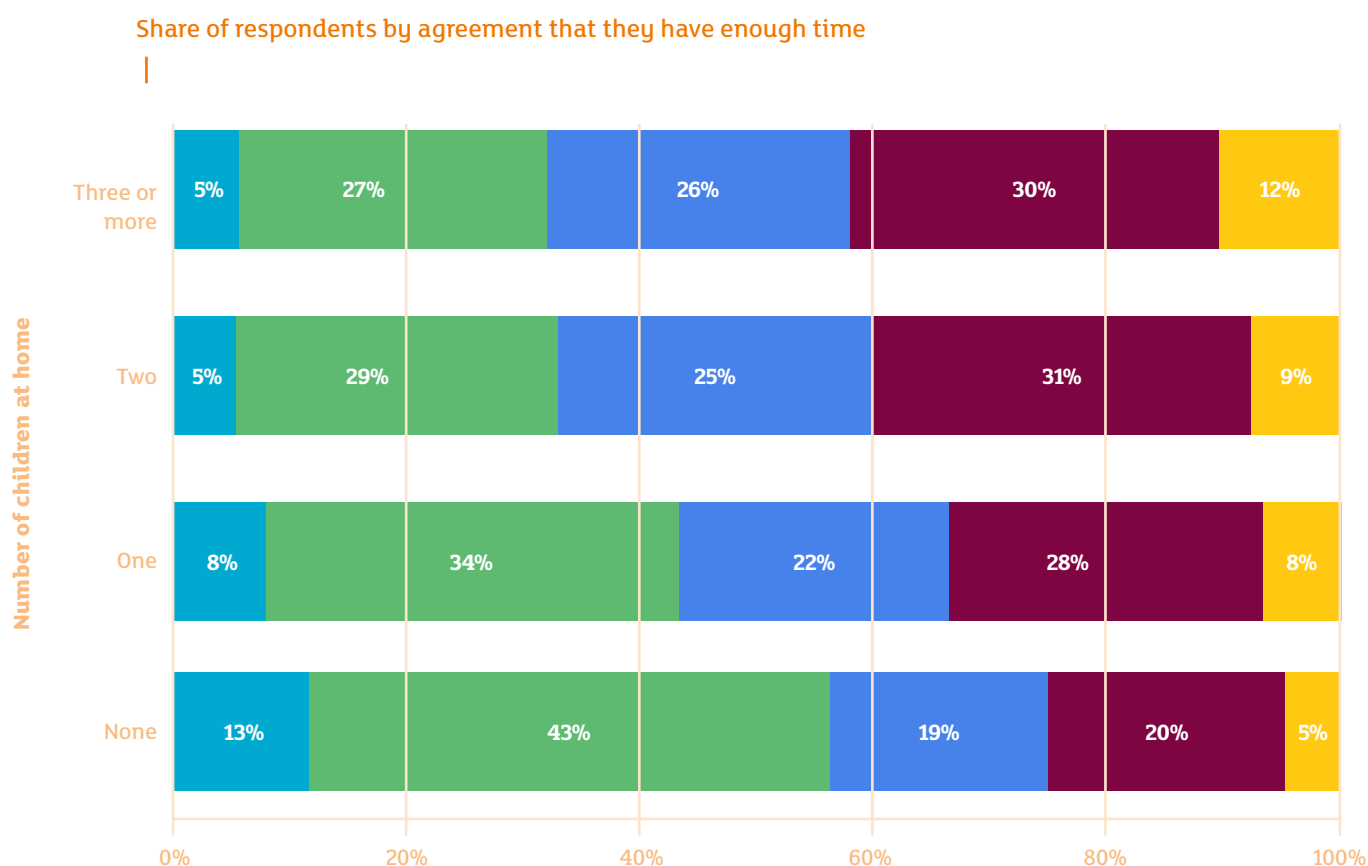


Source: Oxford Economics analysis of NatCen Data

For parents, 56 per cent of adults who did not have a child at home agreed that they have 'enough time to do everything', compared to just 37 per cent of those with at least one child at home (Fig. 10). As we would expect, our perceptions of leisure time are related to the degree of parenting responsibility: while 42 per cent of single-child parents agreed that they had 'enough time to do everything', only 32 per cent of parents with three-or-more children agreed.

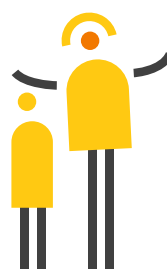
Fig. 10. Distribution of responses by agreement with the statement: 'In general, I have enough time to do everything' – by parenting status

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree



Source: Oxford Economics analysis of NatCen Data

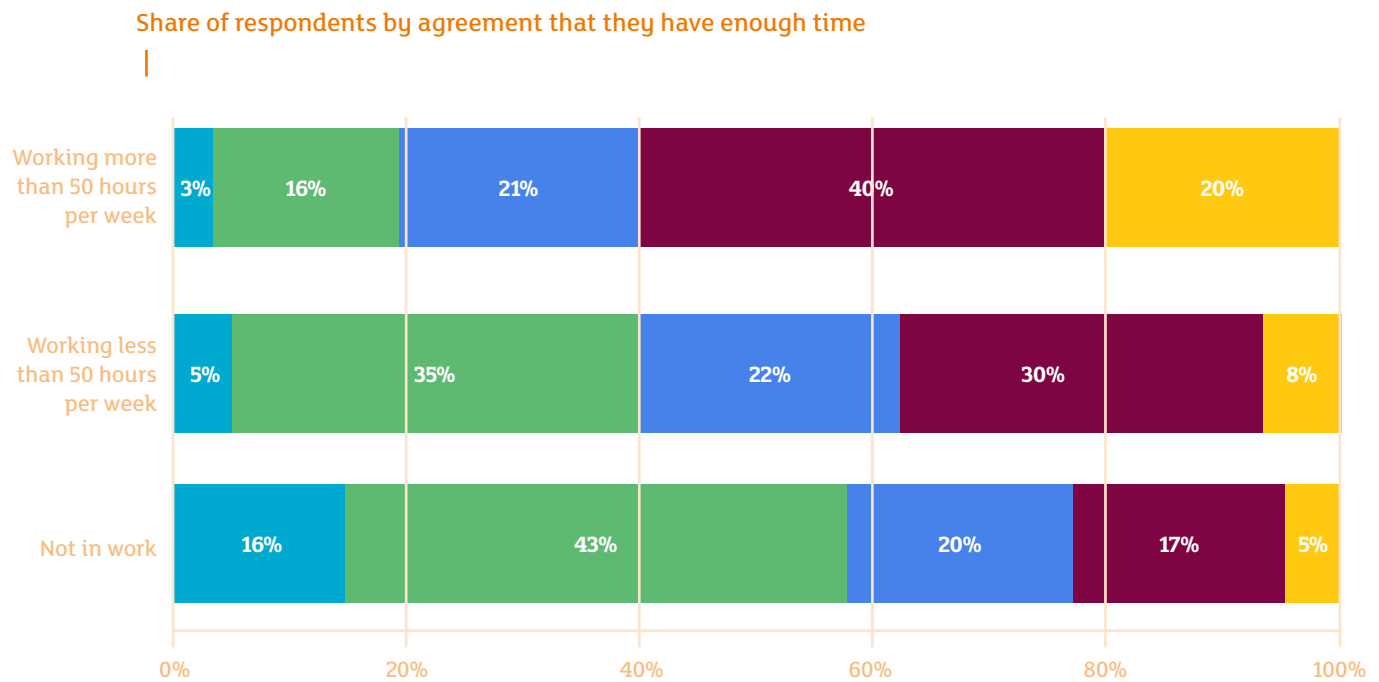
Only 19 per cent of people who work at least 50 hours a week felt they had enough time to get everything done - **compared to 41 per cent** of those who work fewer hours in a week.



Unsurprisingly, our status in the labour market also has a strong association with our perceptions of having enough time. Those not in work were more than 50 per cent more likely to agree they had ‘enough time to do everything’ than those in work (Fig. 11). Workers’ perceptions of leisure time also appear to be influenced by the number of hours worked. We found that people working at least 50 hours per week are noticeably less likely to feel their leisure time is sufficient to get things done. Just 19 per cent of this group agreed this was the case, compared to 41 per cent of those working less than 50 hours per week.

Fig. 11. Distribution of responses by agreement with the statement: ‘In general, I have enough time to do everything’ – by employment status

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree



Source: Oxford Economics analysis of NatCen Data



4.3 In focus: The increased importance of social eating

A revision to the question used to understand social eating patterns indicates that regularly sitting down to eat together is a more important driver of living well than previously thought.

All else equal, someone who 'never' sits down to eat alone had a Living Well Index score 7.9 points higher than a person reporting that they 'always' ate their sit-down meals alone. The equivalent range, based on the responses to our first survey, was just 1.9 points.

While this analysis suggests that eating alone may be detrimental to people's wellbeing, the barriers to sitting down to eat in groups more regularly are many and complex. For some, a failure to do so may be driven largely by social isolation and a lack of personal connections. For others, the key barrier could be finding time in their otherwise hectic lifestyles.

Across the nation, the majority of adults do find time to eat socially on a very regular basis, with 56 per cent of survey respondents reporting that they 'never' or only 'occasionally' ate a sit-down meal alone (Fig. 12). However, for a significant minority, eating alone is a very frequent occurrence: over a quarter of adults reported eating their sit-down meals alone 'most of the time' or 'all of the time'.

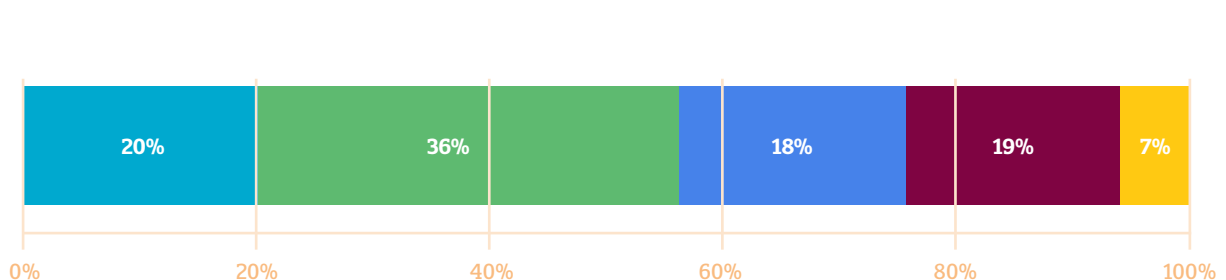


Someone who 'never' sits down to eat alone scored **7.9 points higher** than someone who 'always' eats their sit-down meals alone.

Fig. 12. Distribution of survey responses to the question: 'Thinking about your sit-down meals, how often do you eat these meals alone?'

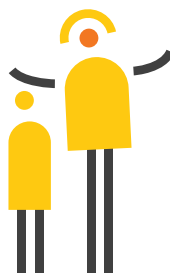
- Never
- Occasionally
- Some of the time
- Most of the time
- All of the time

Share of respondents by frequency of eating sit-down meals alone



Source: Oxford Economics analysis of NatCen Data

Over a quarter of adults reported eating their sit-down meals alone 'most of the time' or 'all of the time'.



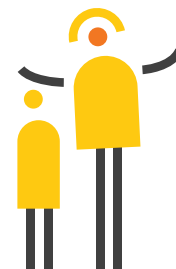
How is social eating impacted by who we are and how we live?

Our new analysis shows that a number of socioeconomic characteristics are linked to our tendency to eat socially, as detailed below:

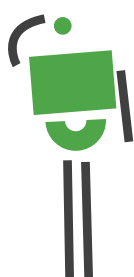
Relationship status: social eating is much more common for those in relationships. Only 13 per cent of people in a relationship reported eating alone 'most' or 'all of the time', compared to 65 per cent of those who were single. But there was a significant gap between those who were married and cohabiting-but-non-married couples. This reflects links with parenting: parents were significantly more likely to regularly eat socially than non-parents.

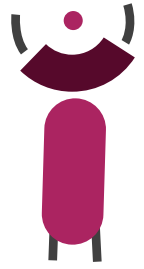
Living alone: 19 per cent of those living alone reported eating their sit-down meals alone 'all of the time' – approximately three times the national average.

Health condition: more than a third of those suffering from a health condition reported eating alone 'most' or 'all of the time', compared to just 22 per cent of those who did not have a health condition. Those suffering from a behavioural, learning or vision-related health condition were significantly more likely to report that they regularly ate alone, compared to other conditions.



People who were single, living alone or suffering from a health condition were more likely to eat their sit down meals alone 'most' or 'all' of the time.





How is social eating impacted by our working lives?

What we do during the day – our ‘economic activity’ – is also strongly associated with our tendency to eat socially, as follows:

Not being in work: those in retirement and those who are looking after the home ate socially most regularly. More than 60 per cent of both groups reported that they ‘never’, or only ‘occasionally’, ate their sit-down meals alone – this is significantly higher than the rest of the population.

Working at least 60 hours a week: at the other end of the spectrum, people working long hours (60 or more per week) were much more likely to eat alone on a regular basis than the rest of the working population. One third of this group ate alone ‘most or all of the time’ – compared to just 22 per cent of the rest of the working population.

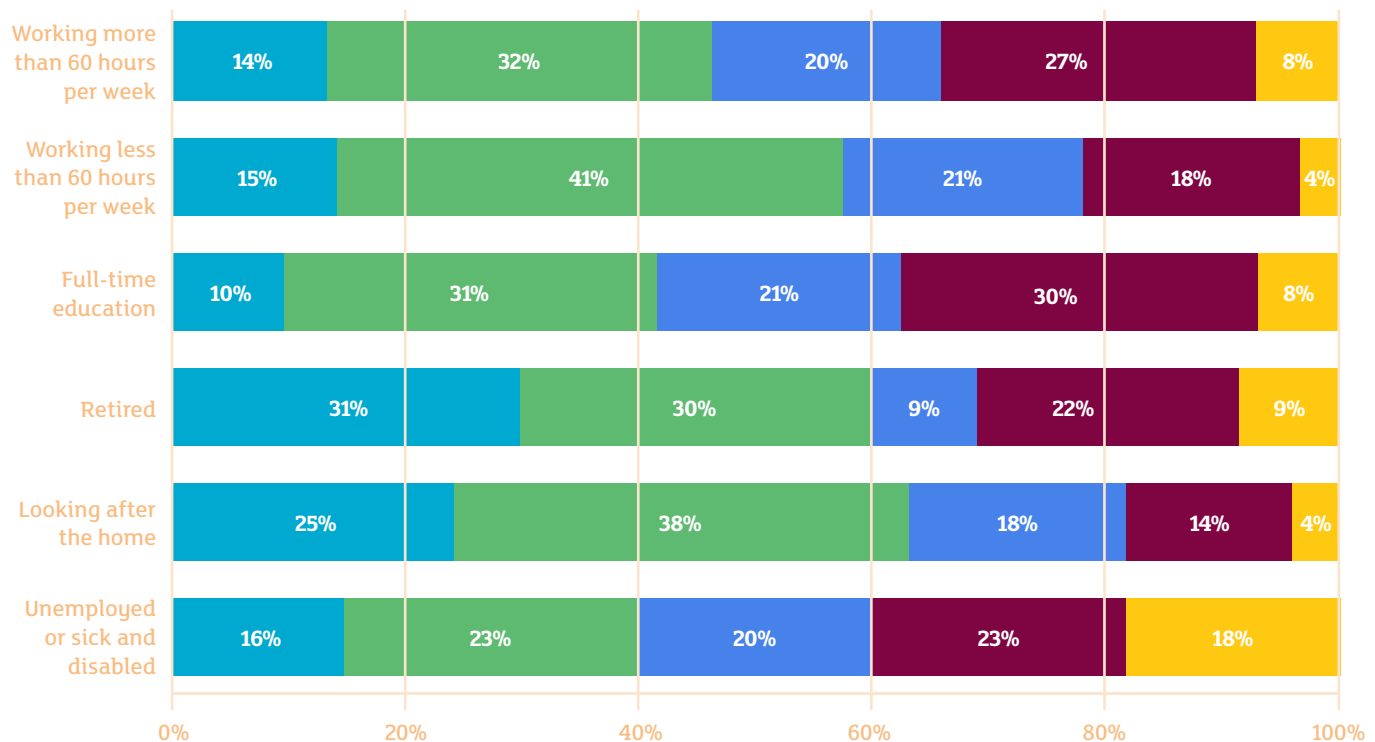
Unemployed, sick and disabled: 18 per cent of people in situations that are strongly correlated with social isolation (unemployment, and being sick or disabled) ‘always’ ate their sit-down meals alone – almost three times the national average.

More than 60 per cent of retirees and people who are ‘looking after the home’ reported that they ‘never’, or only ‘occasionally’, ate their sit-down meals alone – this is **significantly higher** than the rest of the population.

Fig 13. Distribution of survey responses to the question: ‘Thinking about your sit-down meals, how often do you eat alone?’ – by economic activity

- Never
- Occasionally
- Some of the time
- Most of the time
- All of the time

Share of respondents by frequency of eating sit-down meals alone



Source: Oxford Economics analysis of NatCen Data

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