

A photograph of three business professionals, two men and one woman, all wearing white button-down shirts. They are leaning over a table, looking down at something out of frame, possibly a laptop or documents. The lighting is soft and focused on them. The background is blurred. A yellow diagonal shape is in the top left corner.

Work+Family Snapshot 2021

Bright Horizons Client Employee Survey



As part of our commitment to evidence-based practice, we survey our clients' employees to understand more about the challenges they face as working parents and carers, what they need, and what they value in the support their employers provide.

This year, over 1,300 employees responded from across 170 of Bright Horizons' clients and a range of sectors. Respondents have a range of caring responsibilities from childcare to eldercare, including those in the sandwich generation with both.

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Executive Summary

Bright Horizons has for over 30 years partnered with leading employers to provide a range of services helping employees combine work and family successfully.

As part of our commitment to evidence-based practice, we regularly survey our clients' employees about their experience. Those who took part in February-March 2021 had access to back-up care for children and adults or employer-sponsored nursery places, or near-site nursery places, or all of these. They also had access to online resources and advice and in some cases coaching.

After nearly a year of coping through the pandemic, when asked about the impact of having access to these work and family services, more than three-quarters reported a positive

contribution to both wellbeing and engagement while two-thirds noted an upward impact on productivity and on commitment to their employer. This was purely based on having the services available. When respondents had actively made use of back-up care, the experience was even more positive with over 8 in 10 reporting it enhanced wellbeing and engagement and three-quarters noting a positive impact on productivity and on commitment to their employer. Respondents in the survey also scored 20 percentage points higher than the overall UK population in their perception that their employers and managers care about their work and home balance. The responses indicate highly positive results from the purposeful action of family-friendly employers.

The highest rated forms of support from employers included: a culture of flexible working; back-up care services for loved ones of any age; line managers with the knowledge and confidence to understand and support work life balance.

Elaborating on that flexibility, there is an overwhelming preference for hybrid working over either fully workplace-based or fully remote working, echoing many other recent surveys. At the end of the report we draw out key onward actions that will bring benefits to both employers and employees.

Expert Commentary



Jennifer Liston-Smith
Head of Thought Leadership

If there was ever a year to call for employers to be involved in hands-on provision of care for working parents and carers, then it's the one we've just lived through.

Many of our 1,339 participants

added highly insightful comments on how it has been, and what helps. We plan to publish another report exploring those comments further, after this initial data-driven report. For now, here is one example:

“My line manager, and his line manager in turn, have consistently supported me in balancing work with my family responsibilities. They have created a culture in our team where people can be frank and open about their lives and the message is always ‘do what

you need to do’.
Without their attitude - and the back up care provision - I think it probable that I would currently choose to be a stay at home parent.”

There is so much in this comment and it links to the data points throughout our survey. We see references everywhere in the media to the loss of talent from the workforce among working parents and the need to ensure we do not lose ground on progress to level the playing field for all with care responsibilities and particularly to avoid a gendered exit where working mothers have fallen out of their roles, or off career progression tracks, while holding things together in a school-free world.

Our survey data are telling here: our respondents shared compelling insights about their shifting priorities in light of the pandemic. Nearly a half overall attributed higher priority now to family life. That said, and in spite of all the data available about the gendered impact of the pandemic, among our clients' employees, women's career aspirations and ambition remain as high as men's.

We also see in the quote above, and in the data here, that managers matter, a great deal. Organisations and leaders who have done well in taking a flexible and enabling approach, have boosted employee loyalty and engagement for the longer term.

The most striking statistic for me overall is that employees who have access to family-inclusive services such as back-up care,

workplace nurseries, or near-site nursery places and other work+family supports, score a clear 20+ percentage points higher than a random sample of UK working parents on key indicators for talent retention such as the perception that their employer and manager care about their work-life balance.

We like to interpret this as the presence of our services supporting a positive difference, with the employer perceived as genuinely family-friendly and inclusive. It could also, of course, be that our clients are also those that demonstrate leading practice across a number of areas including other aspects of employee experience and engagement. Either way, the difference is marked.

It is well worth casting an eye on the infographics that follow and

the onward actions drawn from them. The data here demonstrate high levels of commitment to our client partners: it can be hard to walk away from an employer who enables the successful combination of work and family in such practical ways.

Survey Population

This year, the survey was sent by email in February and March 2021 to client employees who had Back-Up Care, Workplace Nurseries or Workplace Nursery Partnerships (employer-facilitated places in near-site nurseries) available to them. Some also had further Bright Horizons services available such as Coaching, or online content / lifestage newsletters. We had 1,339 responses across Bright Horizons client employee populations.

Who Responded?

More than 8 in 10 respondents were aged 35 to 54 (55% were in the 35-44 age group and 25% were 45-54). In gender terms, over two-thirds (69%) identified as female, and around 3 in 10 as male (29%). 2% preferred not to say while no-one chose 'Other'.

Regarding organisational roles, there was a spread of representation. The largest group described themselves as 'Professional / technical role e.g. lawyer, programmer' 29%, followed by Middle managers 20%, Administrative/clerical/ other worker with no managerial responsibility 17%, and 12% each selecting Senior manager or director below board level and Junior manager/team leader/

supervisor 12%.

Geographically, there was representation across all regions of the UK, with the largest group (43%) based in London, followed by 19% in the South-East. Six in 10 described themselves as being in a 'Two adult household, both employed more than 30 hours per week'. Nearly 3 in 10 are in a 'Two adult household, one employed more than 30 hours per week'. 6% were in a single parent household, where perhaps the constant demands do not allow much space for a survey. We greatly appreciate the time given by all who did respond.

Who Are They Caring For?

In terms of care responsibilities, the most represented groups are parents of babies to pre-schoolers (47%) and primary school parents (45%). Many of course had multiple caring responsibilities, including those squeezed in the 'sandwich generation' caring for both younger and older loved ones. A quarter of respondents overall were caring for other adults: more than one in five (22%) of employees were either preparing for elder care or had eldercare responsibilities with a further 3% having adult care responsibilities.



22% of employees were either preparing for eldercare or had eldercare responsibilities.

The most represented groups are parents of babies to preschoolers **(47%)** and primary school parents **(45%)**.

The need for support with care solutions was illustrated by respondents' answers when asked about the number of working days impacted by breakdowns in care arrangements – both for children and adult loved ones. The most commonly cited way employees addressed these issues was to take annual or unpaid leave, in many cases losing at least 5 working days in a year. Such unplanned absences risk productivity, in addition to the toll on mental health and wellbeing.

Key Insights

The five key insights reveal an interesting trajectory for the future of employee support.

1.

Family-Friendly
Employers score
higher in key
employee metrics

2.

Care is part of the
infrastructure

3.

Hybrid Working
is the popular
choice

4.

After flexibility
and care
solutions,
employees want
good managers,
policies and
advice

5.

Reset
Rethink
Re-prioritise

1.

Family-Friendly Employers score higher in key employee metrics

Better conversations at work and positive sense of commitment to work-life balance

In February 2021, Bright Horizons published our annual Modern Families Index (MFI) spotlight survey results. These reflected findings from over 1,000 randomly-selected working parents across the UK. One of the aspects tracked in the Modern Families Index is the ease with which working parents and carers can have conversations at work about family matters. This year, among the random UK population sample, 58% agreed they feel confident talking with their employer about family-related issues, while 27% are neutral and 16% disagree. Among Bright Horizons' clients' employees in this current survey, these figures are 77% confident, 14% neutral and 9% disagree. In the general UK population, only 58% of agreed that their organisation cares about their work and home balance, and 59% that their manager cares about this. Here in our client employees' Work+Family Snapshot, 78% agree 'My organisation cares about my work and home balance, while 79% agree 'My manager cares about my work and home balance'.

Company Culture

How our clients' employees feel about their employers compared to general population.

58% of general population agreed their **organisation** cares about their work and home balance



78% of Bright Horizons clients' employees agreed their **organisation** cares about their work and home balance



Caring About Work/Home Balance

How much do managers care about employees work/home balance?

59%

General Population

59% of **general population** agreed their **manager** cares about their work and home balance

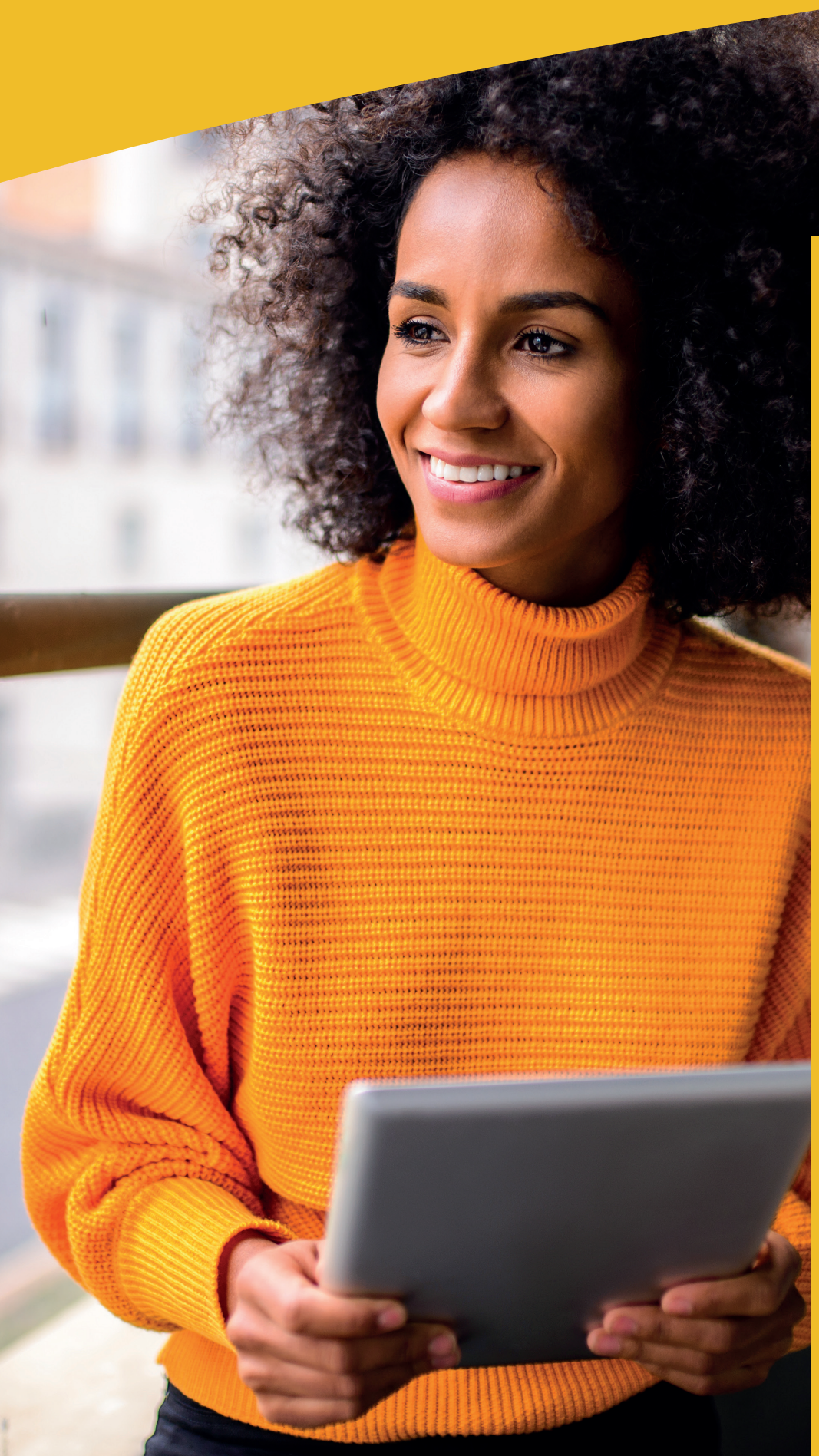


79%

Bright Horizons

79% of **Bright Horizons clients'** employees agreed their manager cares about their work and home balance.





Uplifts in Productivity, Loyalty, Engagement and Wellbeing

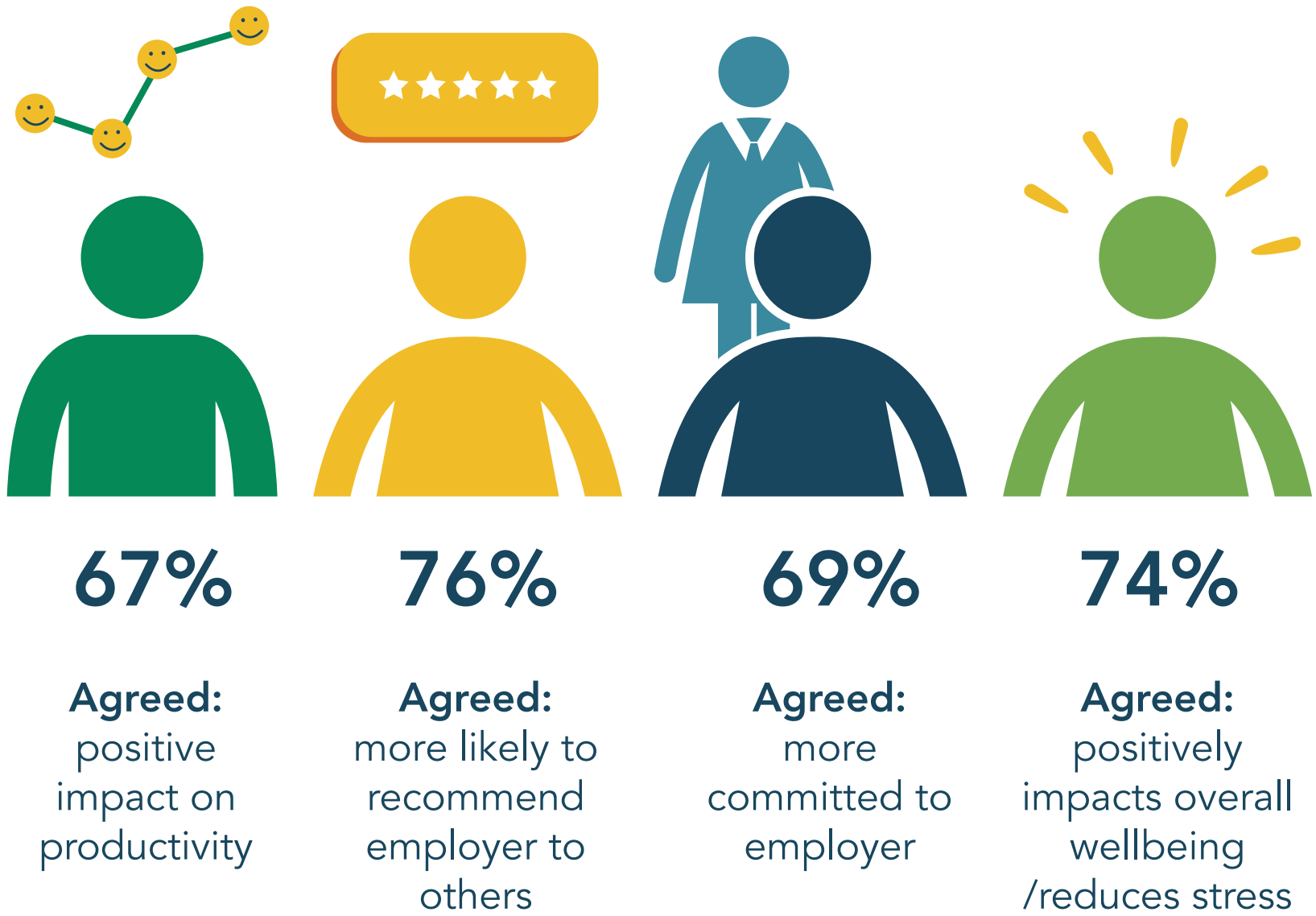
We know from our client partnerships that four drivers often underpin employer programmes for working parents and carers. These are:

- Productivity
- Loyalty
- Engagement
- Wellbeing

To assess the impact of our services, we asked client employees: 'Because you have Bright Horizons Work+Family Care services available to you, please indicate how much you agree with the following statements'. We see to the right the strongly positive impact of being aware that an employer provides this support.

Impact of Access to Family Support

The impact in employee productivity, loyalty, engagement and wellbeing because of having access to our Work+Family Solutions.



2.

Care is part of the infrastructure

Parents and Carers need a back-up plan, even outside of a pandemic

Nearly 4 out of 5 (79%) of respondents with children stated they had days where they had a childcare breakdown in a typical year .

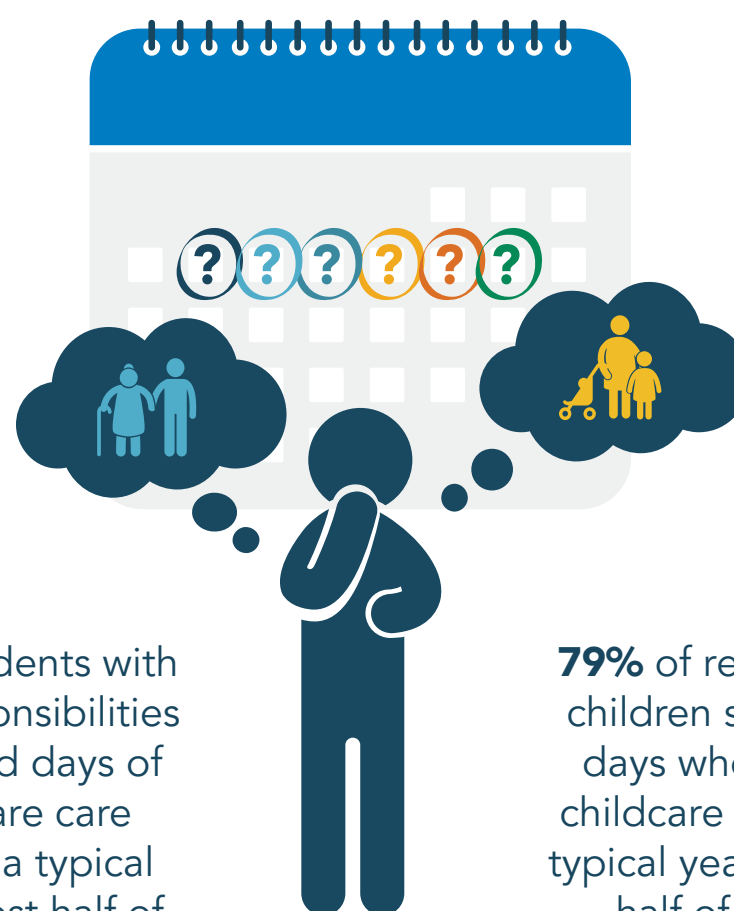
57% of employees who have childcare breakdowns say they are affected by 5 days or more in a typical year, with 24% of affected employees saying they have 10+ days of care breakdown in a typical year.

Nearly 2/3 (63%) of respondents with adult care responsibilities stated they had days of adult/eldercare care breakdown in a typical year.

42% of client employees who have adult or eldercare breakdowns say they are affected for 5 days or more in a typical year. 17% say they are affected for 10 or more days in a typical year.

The Need for Multi-Generational Care

Childcare and adult-eldercare support is a core need. Breakdowns can disrupt 5 or more working days in a typical year.



63% of respondents with adult care responsibilities stated they had days of adult/eldercare care breakdown in a typical year, with almost half of those being affected for 5 days or more.

79% of respondents with children stated they had days where they had a childcare breakdown in a typical year, with well over half of those being affected for 5 days or more.

Employees' Top Three Methods to Address Care Breakdown



72%

To use paid/annual leave



48%

Work in an agile way



44%

Use the support of family/friends

In a typical year, the top three ways that employees address care breakdowns are to use paid/annual leave (72%), work in an agile way (48%) and use the support of family/friends (44%).

All this can affect both wellbeing and productivity for employees. For employers, unplanned absence (whether paid or not) impacts schedules and deadlines, and other team members; therefore productivity.

During the Coronavirus pandemic, and particularly when schools or other provisions were unavailable, and even family support was restricted, the average number of days needing alternative care arrangement was 31, with 10 days being the most frequent occurrence.

Just over 20% of client employees who needed alternative care arrangements, needed them for over 50 days during the pandemic.

Back-Up Care is decisive in both productivity and loyalty

Continuing the exploration of Productivity, Loyalty, Engagement and Wellbeing, from insight 1 above, scores are even higher among those who have used Back-Up Care in the last 6 months, to cover breakdowns in childcare or eldercare.

Impact from Having Used Back-Up Care
The impact in employee productivity, loyalty, engagement and wellbeing because of having used our Back-Up Care solution.



In recent months, having a back-up care nanny arrive, or other back-up arrangement, all following strict Coronavirus protocols, has clearly enabled productivity and reduced stress. For many, it has also been seen as a sanity-saver. Respondents commented:

"Without childcare provision, I would not be able to dedicate the time I do to work. I need to know that there's a back-up and this gives me peace of mind. Fabulous service."

"I thought the service was amazing when I needed urgent coverage. It was so helpful."

"I had an ongoing project to accomplish, the backup care allowed me to dedicate the time I needed towards this to achieve a successful and good quality outcome on the project."

"I had a meeting with senior management that I was able to attend and prepare for thanks to back up care."



"I was able to work on my non working day for 6 weeks to support a client project. I felt comfortable putting my son in nursery for the extra day as it was already the one we used"

3.

Hybrid Working is the popular choice

In line with just about every other current survey of employee preferences, the Work+Family Snapshot showed an active desire for a blend of working styles.

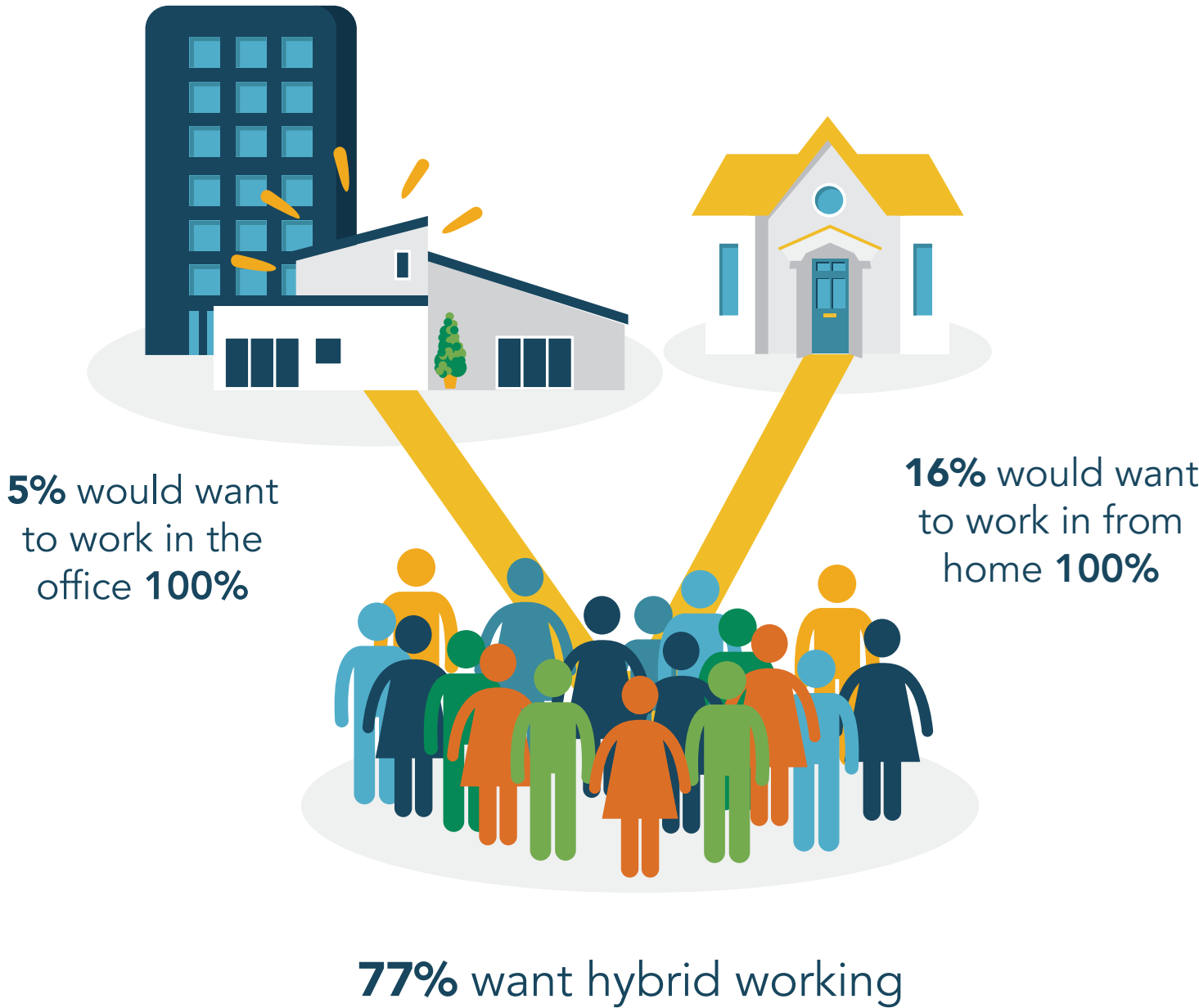
We asked: **'We're interested in understanding how working arrangements are changing. Some roles or work cultures have very specific needs about physical presence but in an ideal world, what would your preference be around hybrid working?'**

Client employees would strongly prefer to continue hybrid working. Further to this, nearly 8 in 10 (79%) overall prefer to work at least half their time from home in their ideal world.

Compared with the random sample of UK working parents, polled in December 2020 for the Modern Families Index, this population of our client employees, polled in February-March 2021, shows a higher preference for a blend of work locations.

Preferences Around Hybrid Working

A strong interest in hybrid working.





"These services give me a greater ability to meet critical needs of my role if there is a short notice priority that needs to be covered on non school/nursery days"

4.

After flexibility and care solutions, employees want good managers, policies and advice

We asked: 'Thinking about the ways that your employer supports or could support you as a working parent / carer, please tell us the top three ways you value most.'

The top 3 overall are overwhelmingly a positive approach to flexible working (90%), with access to emergency care (43%) and ensuring line managers are equipped to support work-family balance (42%) both being similarly important. Interestingly, all these score higher than enhanced parental leave policies.

If we add in the appreciation for employer-subsidised places for regular care, then care solutions score 76% overall. Access to advice and coaching together score 19%.

Most Valued Support from Employer

The support employees value most from their employers.

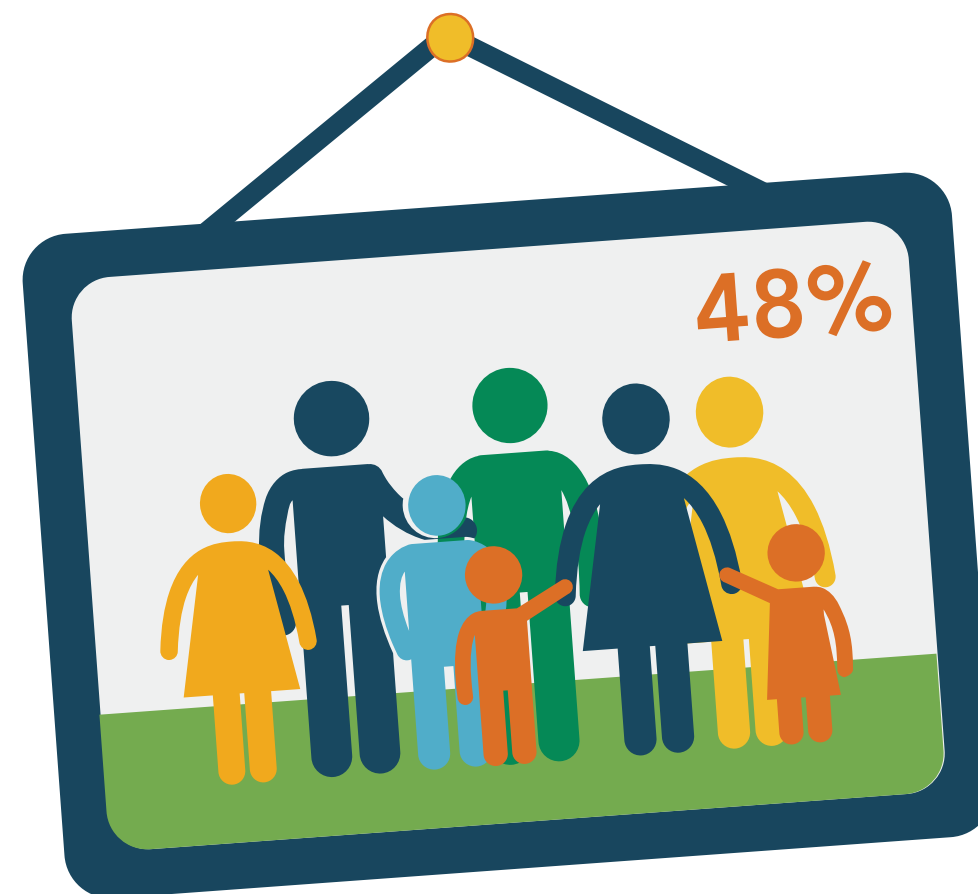


- 90%** Positive approach to flexible working
- 43%** Access to emergency child or adult dependant care
- 42%** Knowledgeable and supportive line manager
- 39%** Enhanced parental/dependant leave
- 33%** Access to employer-subsidised childcare

5.

Pandemic Effect on Work-Life Balance

Employees' views on their work-family balance and their careers due to the pandemic.



Nearly half of respondents see family life as a higher priority now than before the pandemic

Reset, Rethink, Re-prioritise

We took the opportunity to ask: 'Have the pandemic and lockdowns affected your approach or how you view your work-family balance or your career? [PLEASE TICK ALL THAT APPLY e.g. you may be both more ambitious for career and home life.]'

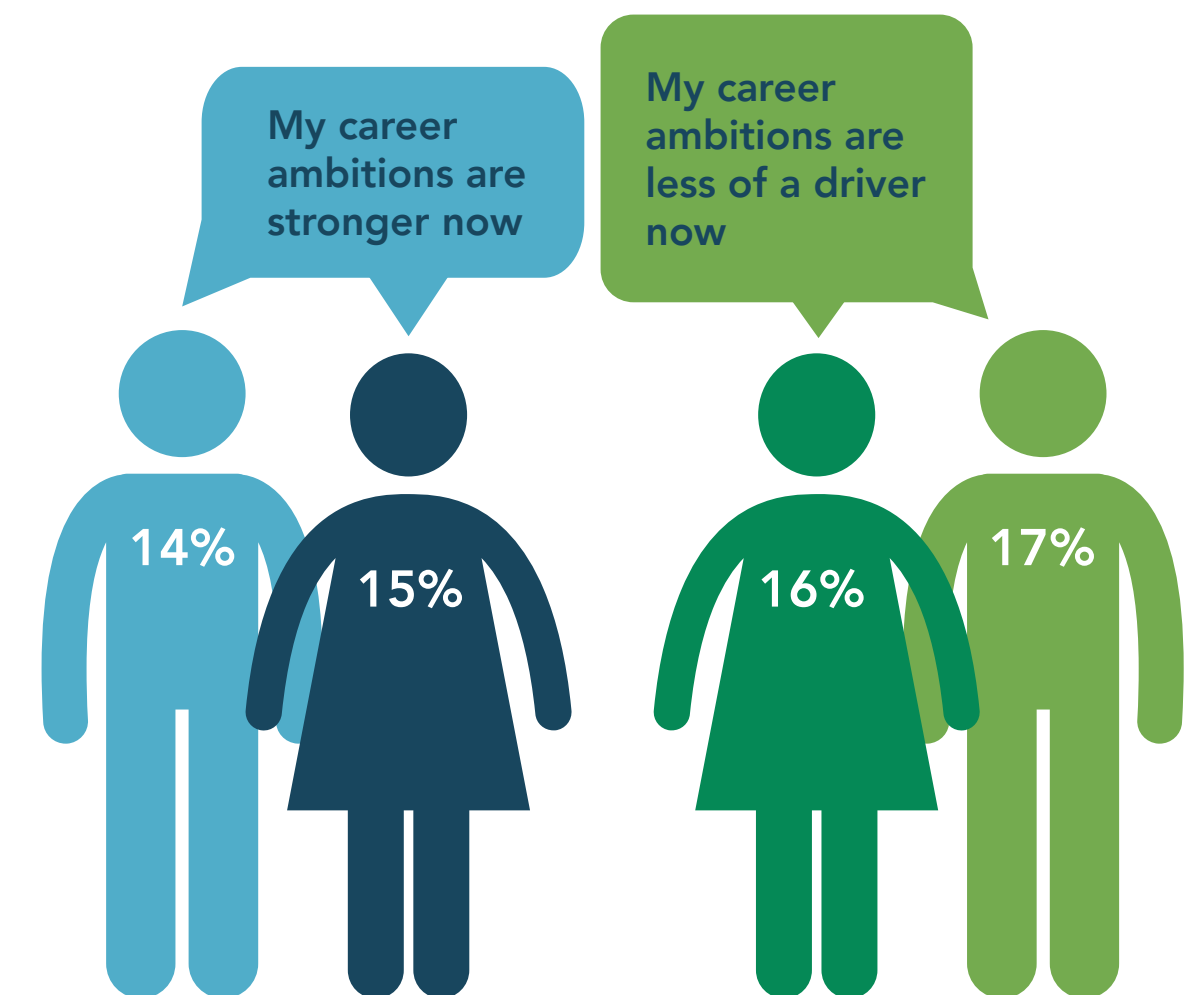
It is clear to see the effect the pandemic has had on commitment to family life. The most frequently selected item, ticked by just under half (48%) of client employees, was that family has become a higher priority than before. Both men and women thought this was equally as important, men fractionally more so.

This may reflect the natural swing towards appreciating the fundamentals of health and closest loved ones during a global pandemic. It could also signal that – although working from home during the absence of schooling has been extremely demanding and challenging – it has also reinforced the wish to be there for family life as a priority.

Alongside this, both genders remain aligned in career ambition.

Pandemic Effect on Career Drive

Men and women's career ambitions remain aligned despite the pandemic.



Actions for forward-thinking employers

There are many lessons in the rich data here. We have drawn out three overall themes. Each has an action supported by the drivers for these actions from the data.

1. Support Practical Care Needs

Action:

Provide practical support with care, including back-up care for emergencies.

Why?

Drivers revealed in the data:

- Access to care provision and use of care are both strongly associated with enhanced productivity, engagement, wellbeing and loyalty.
- Family is a higher priority than ever, and career ambitions are still strong across genders. Helping with care removes the conflict between the two.
- Year-on-year, even outside a pandemic, childcare breakdowns happen for more than 7 in 10 employees and often last 5 to 10 days or more. A quarter of the population here also have adult care needs.

2. Develop Flexible Management Capability

Action:

Be intentional about new ways of working and equip managers to manage well.

Why?

Drivers revealed in the data:

- Over three-quarters expect to work in a hybrid way, across a blend of on-site and remote locations. This requires new skills from managers in motivating performance, in understanding productivity and in supporting work-life balance
- Among the top most valued employer supports, 9 in 10 look for a positive approach to flexible working and over 4 in 10 seek line managers who are equipped to support work-family balance

- With family being a higher priority now, managers need to demonstrate empathy and empower team members to problem-solve to deliver priorities while maintaining balance.

3. Measure and Communicate Impact

Action:

Plan and measure your family-friendly programme impacts, and communicate your successes.

Why?

Drivers revealed in the data:

- Understand the bottom-line benefits of your programme by measuring links with productivity, engagement, wellbeing and loyalty and how they fit your demographics. Data here imply family care needs span the full lifecycle (1

in 4 in this survey had a need for adult care).

- Access to family-friendly services correlates strongly with perception that employers and managers care about work-home balance. Therefore, promote what you do, communicate it internally and externally; this will enhance both usage and engagement.
- Participants' comments show back-up care goes hand in hand with true flexibility, enabling employees to access quality care when needed at short notice. Employer-sponsored ongoing care at or near the workplace aids office use for collaboration. Use testimonials such as those in this report to underline the win-win impact of using the services you provide.

These evidence-based lessons point to urgent priorities for those employers which – like Bright Horizons' clients – are serious about engaging and empowering employees in a changed world.



About Bright Horizons

Bright Horizons is dedicated to providing the best in class work+family solutions. Alongside the provision of great childcare solutions, today we are dedicated to supporting employers to enable the holistic combination of work and family; ensuring their working parents and carers are amongst the most engaged and productive members of any team. The business now globally encompasses approximately 1,100 nurseries, over 10,000 emergency childcare and back-up care providers and works with more than 1,300 of the world's leading employers providing a full range of work and family support. Our bespoke services address the practical, wellbeing and cultural needs of organisations and individuals. With operations in the US, UK, India and the Netherlands, we specialise in supporting multi-national clients. We have a strong commitment to corporate sustainability, which we approach through our Bright Horizons Foundation for Children. We act as a trusted partner, provider and advisor on strategies for combining work+family. This plays a key part in attracting, engaging and retaining clients' talented employees.

To learn more, please visit: **solutions.brighthouse.co.uk**

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