



Work+Family Snapshot 2022
Bright Horizons' Client Employee Survey





Work+Family Snapshot **Bright Horizons' Client Employee Survey**

As part of our commitment to evidence-based practice, we survey our clients' employees to understand more about the current and future challenges they face as working parents and carers.

We aim to understand their evolving needs and anticipate what they will most value from their employers, to help organisations provide better support both today and going forward.

This year, over 1,500 employees responded from across 186 of Bright Horizons' clients and a broad spread of sectors. Respondents have a range of caring responsibilities from childcare to eldercare, including those with both - the 'sandwich generation'.

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Executive Summary

For over 30 years Bright Horizons has been imagining and creating new solutions for work, family, life and education. Partnering with leading employers worldwide, our wide range of services supports their employees in successfully combining work and family.

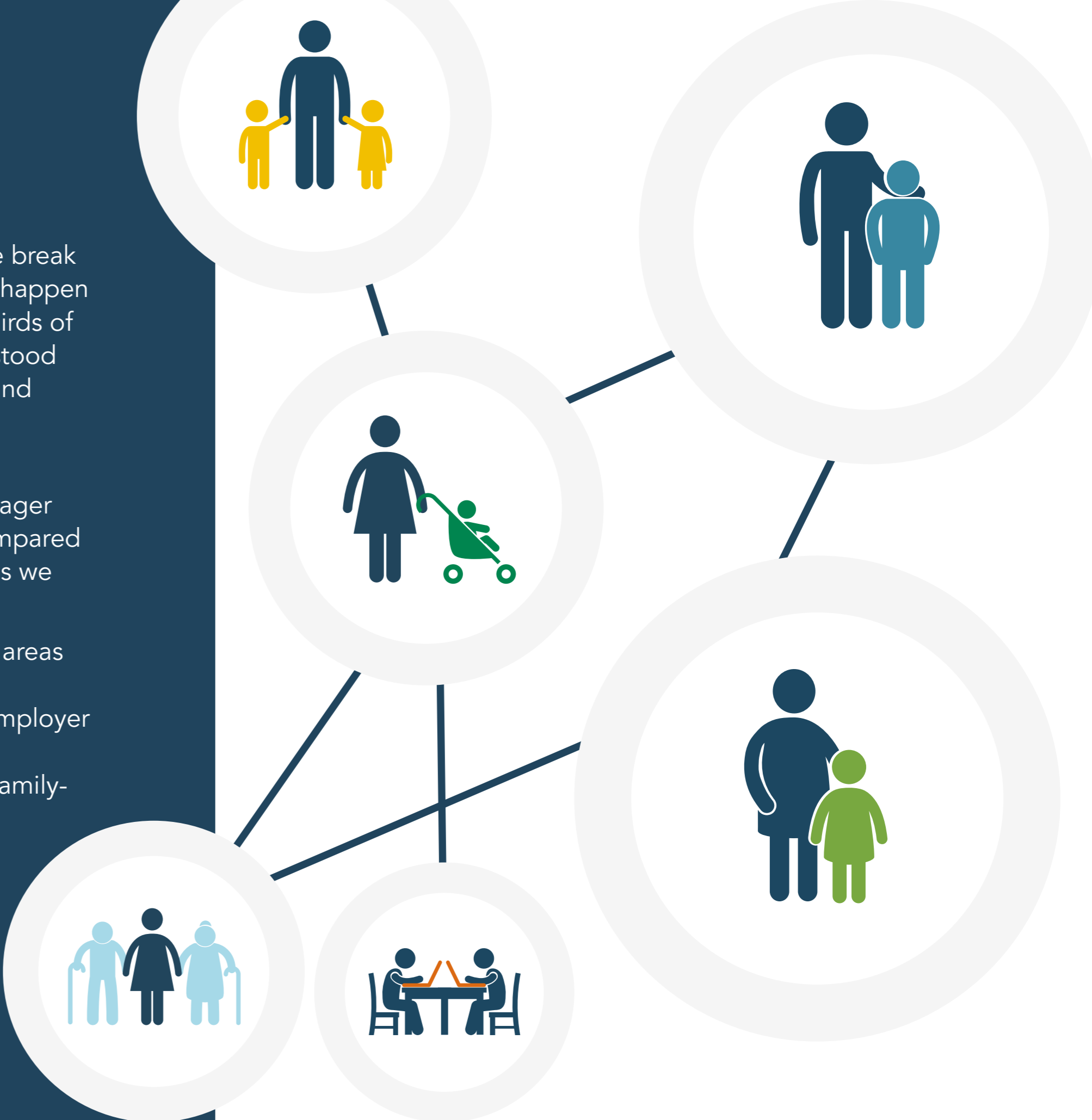
As new expectations crystallise in the post-pandemic world, we see four key themes emerging this year when surveying our clients' employees.

- There is a continuing shift towards placing higher priority on family life and also towards rethinking overall future life direction. For many, this is also coupled with a strengthened career ambition, emerging over the last year and as they look ahead.
- The rethink is amplified in older workers, sounding a further alarm for talent retention.
- The provision of care solutions, both short-notice and day-to-day ongoing care, has a very strong positive impact on areas as wide-ranging as wellbeing, loyalty, engagement, productivity, parental leave return and career progression.

- As we move away from lockdowns, care break downs are still inevitable. This tends to happen for several days across a year for two-thirds of parents. This reality needs to be understood and anticipated by capable managers and mitigated by back-up care provision.

Talking of managers, 81% of our clients' employees surveyed agree that their manager cares about their work-home balance, compared with just 62% in the general population, as we explore further in the data below.

At the end of the report we draw out two areas for onward action. These should reinforce Work+Family strategies for our existing employer partners and direct those employers just beginning their journey towards being a family-inclusive employer of choice.



Survey Population

This year, the survey was sent by email at the end of February and ran during early March 2022 with 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 access to further Bright Horizons services such as Coaching, or online events / content / newsletters.

We had 1,502 employee responses across 186 of Bright Horizons 400+ UK client populations.

Respondents came from the following sectors (in order of representation): Financial Services, Consumer Product/Manufacturing, Insurance, Law, Consultancy, Professional/Business Services, Bio-Tech/Pharmaceuticals, Technology, Entertainment/Media, Government, Higher Education, Hospitals/Health Systems, Energy & Utilities, Retail, Consumer Services, Construction, Publishing.



Who responded?

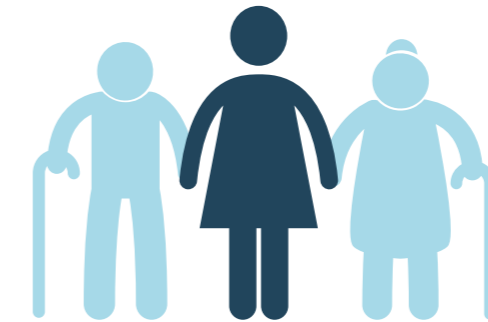
Nearly 8 in 10 respondents (79%) were aged 35 to 54. In gender terms, over two-thirds (68%) identified as female, and around 3 in 10 as male (29%). 2% preferred not to say while one person chose 'Other'.

- Regarding organisational roles, there was a spread of representation. The largest group (30%) described themselves as 'Professional / technical role e.g. lawyer, programmer', followed by nearly a quarter (23%) middle managers. 14% selected 'Junior manager/ team leader/supervisor', 14% 'Administrative/clerical/ other worker with no managerial responsibility', and 12% indicated 'Senior manager or director below board level'.
- Geographically, there was representation across all regions of the UK, with the largest group (45%) based in London, followed by 17% in South-East England.
- Nearly 9 in 10 (88%) identified as in an 'Opposite-sex couple sharing household', while 2% indicated being in a 'Same-sex couple sharing household'. 6% were in a single parent household.

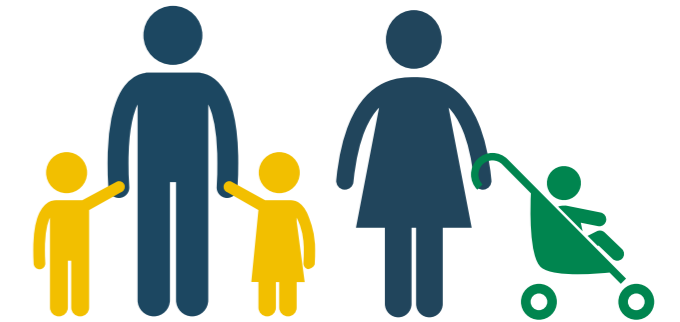
We greatly appreciate the time given by all respondents.

Who are they Caring for?

In terms of care responsibilities, the most represented groups are parents of babies to preschoolers (61%) and primary school parents (44%). Many have multiple caring responsibilities, including those squeezed in the 'sandwich generation' caring for both younger and older dependants. Almost a quarter of respondents overall (24%) were caring for, or preparing to care for, other adults: more than one in five (22%) with elders and a further 2% with other 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 (61%) and primary school parents (44%).

Regular care breakdowns

Two-thirds overall (67%) reported having childcare breakdowns in the past year, and **81% who have adult or eldercare responsibilities had care breakdowns**, illustrating the critical need for support with care solutions across generations.

Key Insights

These four key insights point the way for employers of choice.

1

The Rising Generation Expects to 'Have It All'

2

Older Workers are Questioning Their Future Direction

3

Care Provision Enhances Talent Retention and Progression

4

Providing a Plan B Equips Parents and Carers to Thrive

1

Key Insight: The Rising Generation Expects To 'Have It All'

Family and Career Both Matter

When asked to reflect on the last 12 months, nearly 6 in 10 employees (58%) stated family has become a higher priority than before. This is a 10 percentage point rise, or 21% increase, on last year's figure. It is identical for women and men.

Interestingly, seeing career as a priority also increased. 3 in 10 (31%) of our clients' employees stated their career ambitions are stronger now than a year ago: a 107% increase on 2021 figures.

These trends are especially marked in the 18-34 age group, with nearly 4 in 10 (39%) indicating higher career ambitions, and two-thirds (67%) putting greater emphasis on family.

Workers aged **18-34** place growing emphasis on **BOTH career and family**



39% ↑

67% ↑

Employers Beware: the trend for employees wanting to 'have it all' shows no signs of receding post pandemic. In fact, it's becoming the new normal. The younger generation's expectations are expanding to include both career and family balance, so forward-thinking employers wanting to retain talented people will plan ahead to facilitate both.

In gender terms, 32% of women and 29% of men indicated higher career ambitions, across all ages. A further 24% of men and 20% of women indicated, 'My priorities, ambitions and balance remain similar to before'.

2

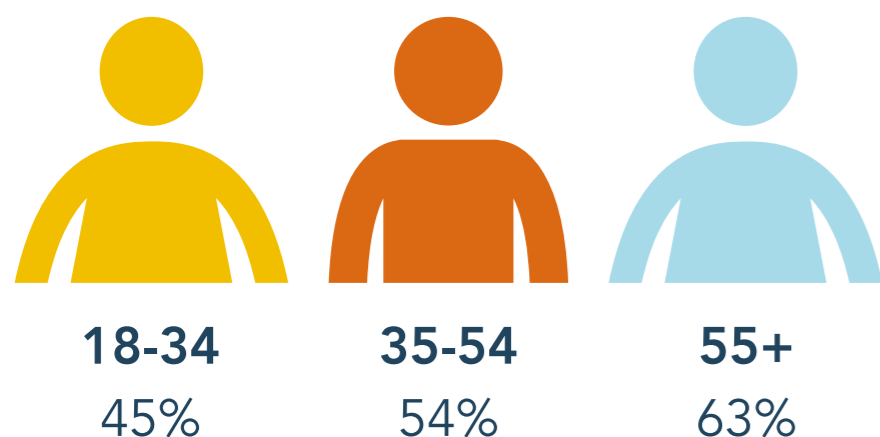
Key Insight: Older Workers are Questioning Their Future Direction

A Rethink

Over half of employees overall (53%) indicated 'I find myself reflecting more on my overall direction and sense of purpose than I used to'.

This response was selected by 56% of women and 48% of men in the survey and was more popular with increasing age (see infographic).

Many are rethinking their purpose: including well over half of all workers over 35.

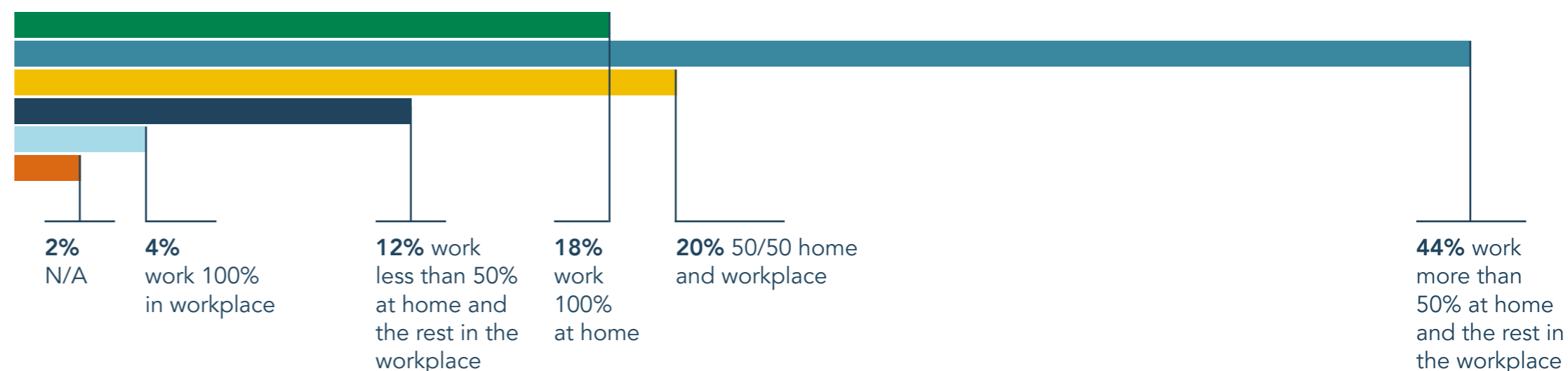


This deep rethink over purpose and future direction sounds an alarm for the retention of talent among all ages but particularly for employers seeking to retain their experienced workers aged 55+.

Hybrid Working is the Preference

As families continue to weigh up priorities post-pandemic, hybrid working is a key enabler, in those roles and sectors where an element of remote working is possible. Over 8 in 10 of our clients' employees would prefer to work between 50% and 100% from home where possible. This is in response to a carefully-worded question: '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?'

Looking ahead a blend of work locations is preferred: 82% want at least half their working time at home



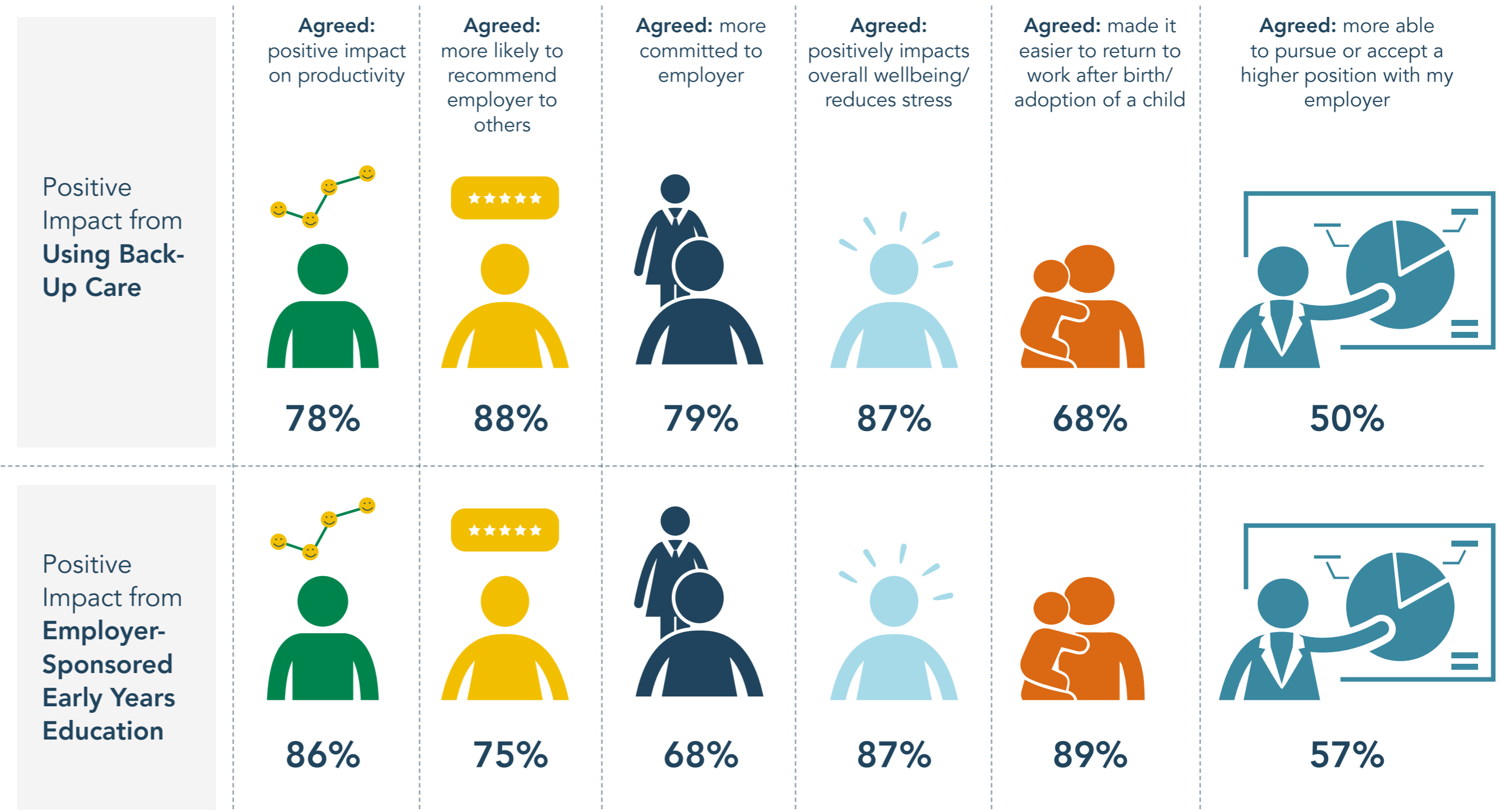
When planning facilities and working arrangements, most employers will be mindful of the overall desire of employees to access hybrid working options. Those employers wishing to get teams back to the office may need to think carefully how to encourage reluctant returners.

3

Key Insight: Care Provision Enhances Talent Retention and Progression

Back-Up Care and Employer-supported Early Years Education both drive Productivity, Loyalty, Wellbeing, Engagement and Career Progression

The survey showed that 7 in 10 (70%) are more likely to recommend their employer to others based purely on having access to Bright Horizons Work+Family services. This rises to three-quarters (75%) for those who use employer-sponsored Workplace Nurseries or Nursery Partnerships. Notably, nearly 9 in 10 (88%) are more likely to recommend their employer when they have successfully used Back-up Care.



3

Key Insight: Care Provision Enhances Talent Retention and Progression

Back-Up Care and Ongoing Care mean the Employer is Valued

Overall the figures on the previous page show a very strong positive impact of both back-up care and ongoing care provision on wellbeing, productivity, engagement and loyalty. There is a particularly strong impact in employee engagement and wellbeing after successful use of Bright Horizons' Back-Up Care.

Employer-sponsored access to an early years setting has a higher impact in empowering parental leave returners, and in enabling the pursuit of a higher position as well as productivity.

This means that providing access to back-up and ongoing care makes good business sense as well as being beneficial for employees. Employers already providing these services are ahead of the game in talent retention. These key supports will help employers with their succession planning and talent pipeline. They can also contribute to narrowing the gender pay gap, with parental leave returners and those with care responsibilities able to take on promotions and positive career progression.

Comments on the value of Back-up Care and Nursery services included these:



"Back-up care service was very helpful. The nursery onsite in our work place was absolutely fantastic and makes a huge difference to balancing life, childcare and work".



"The fact that [employer] offers this emergency service to working parents is a testament to their purpose and I feel so supported as a working parent! All companies should do the same!"



"Placing our twin daughters into preschool 3 days a week at [Bright Horizons setting] has been the best choice, they have learned so much. This being part of the [employer] childcare, with salary sacrifice possible, means it's more affordable for those with multiple children".



"This has been a godsend. Having a nursery on-campus has allowed me to work knowing my kids are nearby if they need me".



"It's really fantastic that I have the option of back-up care for when our regular childcare arrangements aren't available. We don't have family nearby who can step in, so having this available takes such a stress off and it means that I don't have call work and ask for time off because of childcare issues".

3

Key Insight: Care Provision Enhances Talent Retention and Progression

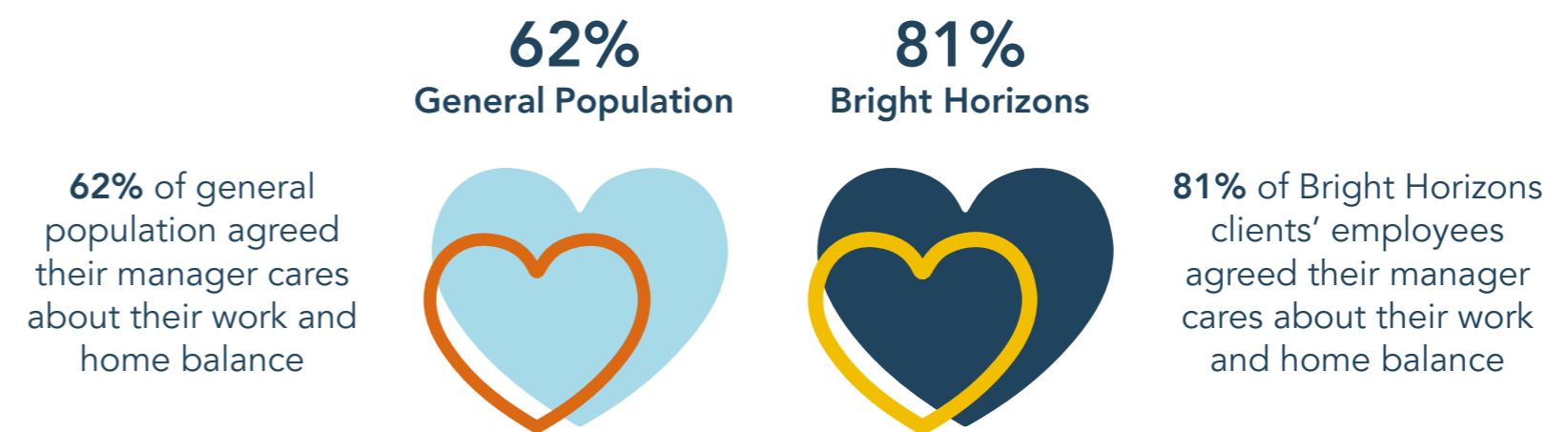
Practical Support is Linked with Positive Views of the Employer

In addition to the considerable benefits above, Bright Horizons' clients also score well above average on the ability to discuss family at work and the perception that the employer cares about work-home balance.

In February 2022, Bright Horizons published our annual Modern Families Index (MFI) results. These show 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, 64% agreed they feel confident talking with their employer about family-related issues. Among Bright Horizons' clients' employees in this current survey, 7 in 10 (72%) feel confident discussing family issues with their employer.

Both surveys also explored the sense that employers and managers care about work-family balance, with the comparison shown in the infographic.

Managers Care about Work/Home Balance: Managers among our client employees are perceived as caring more



It is notable that the difference in employer perception by employees is so much higher where Work+Family supports are in place compared with the wider population.

As in 2021, there continues to be a strong correlation between providing family-friendly services to employees and the perception that the employer cares about work-home balance. However, there is a slight caution here for forward-thinking employers: the general population perception figure is rising, suggesting that more employers generally are seen as caring about work-home balance in the post-pandemic era, so top employers must remain proactive and not become complacent., In future, they will need to work harder to stay ahead.

4

Key Insight: Providing a Plan B Equips Parents and Carers to Thrive

We asked about any breakdown in care arrangements or need for care at the last minute during the previous 12 months.

Two-thirds need Short-Notice Childcare

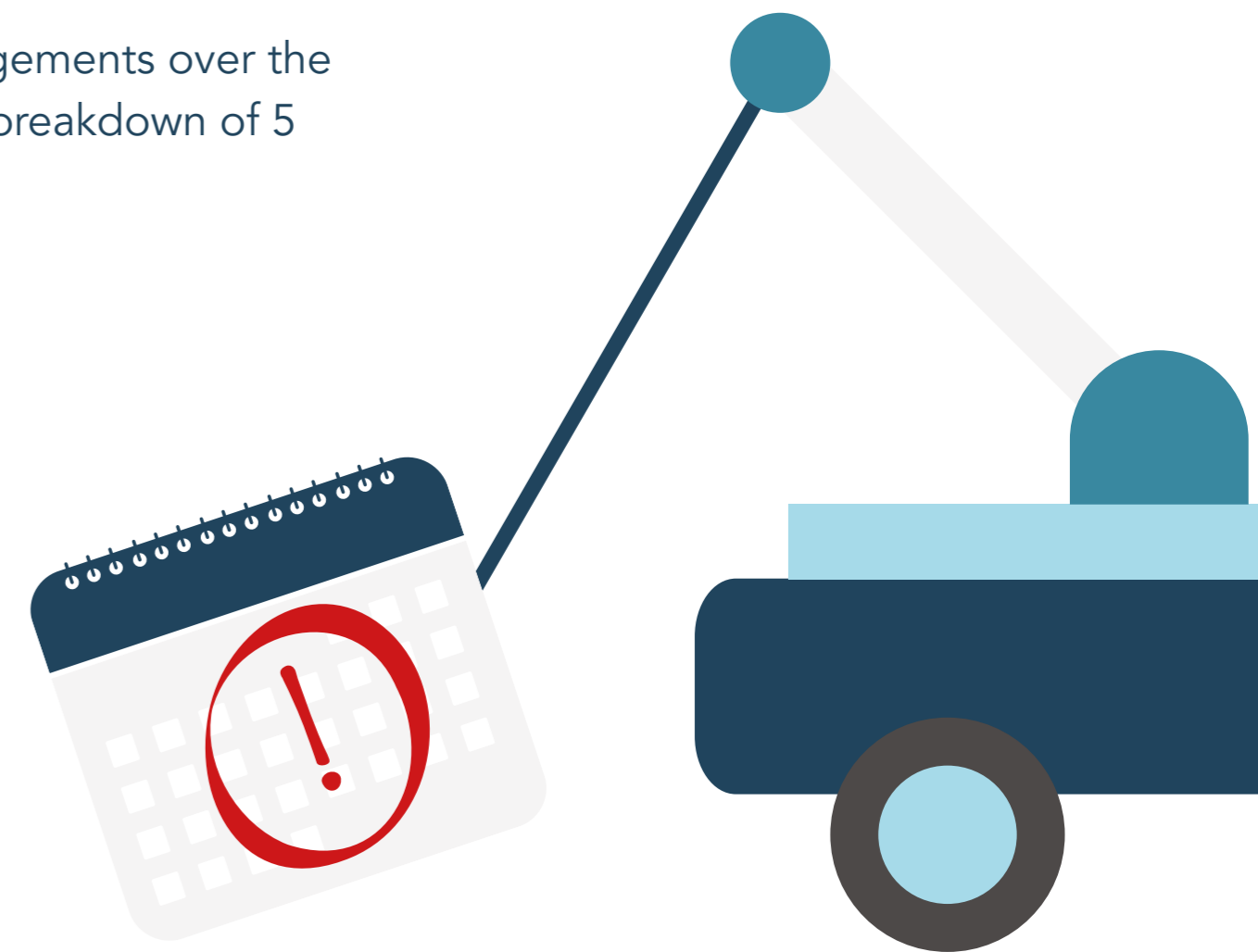
67% of respondents said they had a breakdown in childcare arrangements. This figure was 71% in our February-March 2021 study, amid lockdowns. The similar figure this year shows the need for short-notice care arrangements continues beyond the pandemic restrictions. Of those who had childcare breakdowns, well over half (58%) had a breakdown of 5 days or more. Over a fifth (21%) had a breakdown of care lasting 11+ days. As these figures are cumulative across the year, this finding also suggests that employers providing more than 11 days of back-up care subsidy are likely to avert more absences than those supporting access to only 5 or 6 days' care.

Adult or Eldercare Breakdowns can be Both unexpected and Long-lasting

Over 8 in 10 (81%) said they had breakdown in adult/eldercare arrangements over the past year. Of those who had adult/eldercare breakdowns 47% had a breakdown of 5 days or more and a fifth (20%) had a breakdown of 11 days or more.

One to four days is the most frequent length of a care breakdown, though some are longer

Breakdown Length	Childcare	Adult Care
1 to 4 days	42%	52%
5 to 9 days	30%	23%
10+ days	28%	24%



4

Key Insight: Providing a Plan B Equips Parents and Carers to Thrive

Back-up Solutions keep Major Projects on Course

Well over half of client employees (55%) who were aware they had Back-Up Care available to them were able to work in the past year when they would otherwise not have been able to.

We asked 'was there a specific meeting, task or project that you were able to attend or accomplish because you were able to use the back-up care programme or any of our other services?'

Responses included:



"I was able to meet time-critical month-end and quarter-end deliverables".



"I had a tight reporting deadline and back-up childcare helped to me to continue working efficiently and effectively".



"I was able to travel to Madrid for an event with work which I simply couldn't have done without this back-up care".



"Tech releases would have been delayed due to the time I would have had to take off".



"Key meetings on a new deal".

The survey also found that **taking annual leave is the most popular option for addressing short notice care needs once all back-up care days have been used (57%).**

Given the year on year rise in back-up care days required, employers wanting to anticipate the evolving needs of their employees should **be wary of this 'Plan C' option, as it may result in a reduction in employee wellbeing due to using up annual leave for care rather than family leisure.**

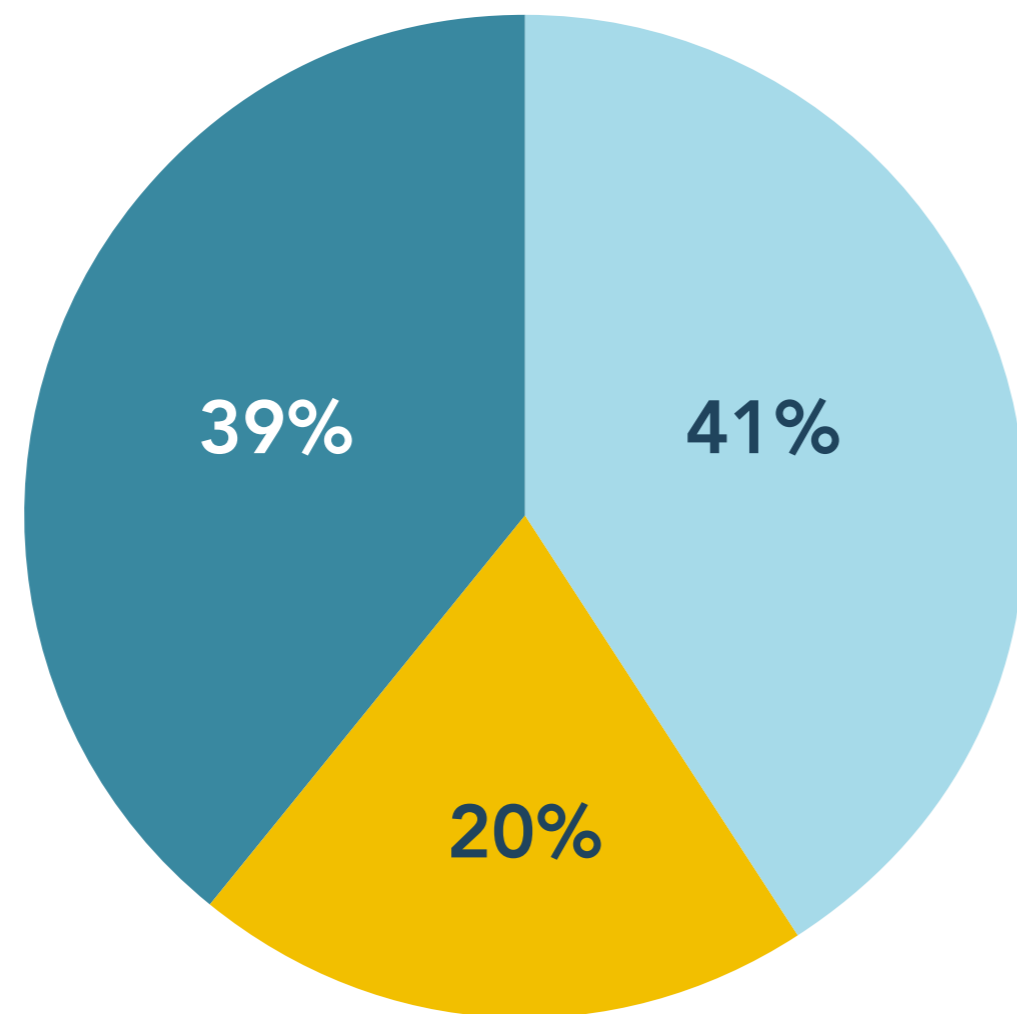
4

Key Insight: Providing a Plan B Equips Parents and Carers to Thrive

Parents and Carers are seeking more Flexible Ongoing Care

We asked whether respondents are looking for, or using, more flexible care arrangements now, compared with pre-pandemic times.

Over 6 in 10 (61%) of our clients' employees are either already using or looking for more flexible care arrangements.



- Looking for more flexible care arrangements
- Using more flexible care arrangements
- Not looking for more flexible care arrangements

Top 3 Employees' Wish List Remains: Flexible Working, Back-Up Care and Good Managers

We asked respondents to select the top three ways that employers support, or could support, them as working parents or carers.

The same provisions were selected as in 2021 - flexible working, access to emergency care, and line managers having the knowledge/tools to support.

1. 9 in 10 (90%) employees selected 'positive approach to flexible working' as one of the top ways their employer could support them (same as 2021).
2. Just under half (47%) selected access to emergency child or adult care (up from 43% in 2021).

3. 37% indicated ensuring their line manager has knowledge/tools to support them in managing work-family balance (down from 42% in 2021).

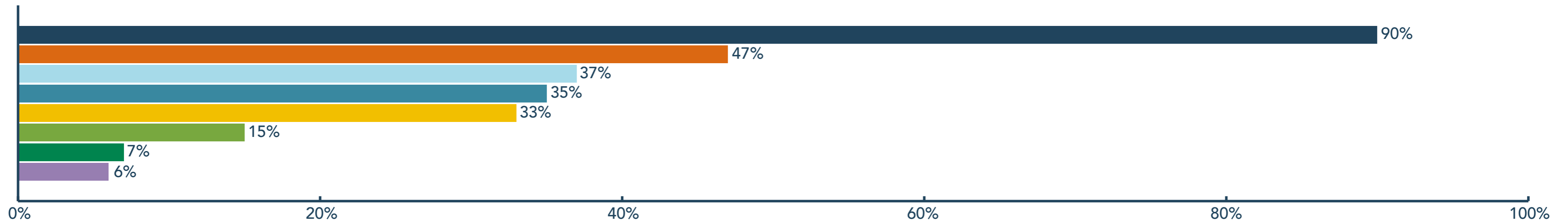
'Other' suggested provisions included:

- "Employee Networks that help with information access when needed".
- "Flexibility to work fewer hours during the holidays and receive less pay, or work the same hours over fewer days".
- "More than 5 days holiday care".
- "Back-up dog care - currently nothing to support my lifestyle".
- "Coaching on child education and well being".

4

Key Insight: Providing a Plan B Equips Parents and Carers to Thrive

Back-up Care is the Second most Valued Employer Support, after Flexibility



- Positive approach to flexible working
- Access to emergency child or adult dependant care
- Ensuring my line manager has the knowledge/tools to support me in my work-family balance
- Enhanced parental/dependant leave
- Access to employer-subsidised childcare places for regular care
- Access to information/advice/events on combining work & family successfully
- Coaching (for work-family balance or through parental leave)
- Other (please specify)

Employees rate the three core elements highly as we found last year. This shows the enduring value for both those who already have flexibility, short-notice care options and understanding managers and those who aspire to have them in future.

4

Key Insight: Providing a Plan B Equips Parents and Carers to Thrive

We asked what else would help?

We asked: 'What could we, you, your manager, your organisation or the Government do that would make combining Work+Family easier?' Here are some representative responses:

Bright Horizons

- "Convince my organisation to provide more emergency childcare days".
- "Publicise the holiday care options more - I wasn't aware of them".
- "Provide an equal number of back-up care sessions for multiple children".
- "Help me understand what I'm entitled to from government, my employer and your service with easy calculation tools and a clear view of what is available depending on income and family situation".

Themselves

- "Fully utilise paid childcare days, campaign for more flexible working via [employer] employee networks".

- "Continue to be agile in planning my work pattern and flex as needed".
- "Accept that I can't always be 100% effective everywhere when juggling!".
- "Be more confident in having care conversations".

Their Manager

- "Genuinely seek ways to support me in times where it's hard".
- "Play more a coaching role and share his/her experience".
- "Attend webinars and stay up to date on company policies".
- "Training on empathy & understanding pressures for working parents (including training for those that have grown up kids that did not take primary responsibility for childcare routine)".

Their Organisation

- "Provide more emergency childcare days".
- "Provide more subsidised holiday care".

- "Allow employees to have the choice to WFH under their own timetable, while ensuring that those WFH have the same opportunities as those working in the office".
- "Provide carer leave similar to parental leave".

The Government

- "Subsidised holiday care costs, when into full-time school".
- "Make laws that enable working parents to have flexibility around working from home/office".
- "Provide fairer tax breaks for families already under pressure".
- "Free under 3 childcare like the 30 hours a week but below 3 year olds".
- "Subsidise childcare like in other countries (France, Nordics etc.)".

Actions for forward-thinking employers

As we look ahead, there are many lessons to be taken from the rich data.

To provide a clear future focus, we sign-post here two pressing areas for action. Each action is supported by the drivers from the data, and tips on putting this into practice.

1

Recognise the Post-pandemic Drive to Prioritise Family AND Career Equally

Action

Demonstrate to your people that a good family life, career progression and a sense of purpose are possible, while developing alternative ways to work.

Why?

Drivers revealed in the data -

- All employees, and particularly younger workers now place an increasing priority on family, while simultaneously holding strong career ambitions.
- At least half of employees (and two-thirds of older workers) are rethinking their future life direction.
- There are strong desires for flexibility and hybrid working options as businesses emerge into the post-pandemic world. Not all sectors or roles lend themselves to remote working, however across sectors there is a wish for greater time flexibility wherever possible.

How?

Innovative employers will attract and keep talented workers by showing that life outside work is both possible and respected. This could mean ensuring people 'switch off', that they can have some autonomy over where and how they work, and that the employer demonstrates a genuine understanding of the realities of family life.

Most recently, some Bright Horizons clients are recognising family life by enabling employees to use back-up care to access virtual tutoring for older children.

It will equally mean demonstrating that those who are open and up-front about their parenting or caring needs, while delivering their workloads, can stay on meaningful career tracks.

2

Recognise, and act on, the role of care in talent retention and progression

Action

Provide – and promote – practical support with ongoing care, and back-up care for emergencies and short-notice needs

Why?

Drivers revealed in the data -

- Help with emergency care is consistently one of the top valued employer supports in this survey (after flexibility).
- Use of either (or both!) short-notice care and ongoing care provision are strongly associated with enhanced productivity, engagement, wellbeing, loyalty, parental leave return and career progression.
- Year-on-year, even outside a pandemic, two-thirds of employees experience childcare breakdowns. A quarter of the population here also have adult and eldercare needs with over 8 in 10 experiencing the need for a short-notice change in care provision.

How?

Along with new ways of working, employees are looking for more flexible care solutions as they take charge of their career paths. Back-up care can help employers to meet these aspirations.

To support employees' needs and growing expectations, while also helping mitigate the current cost of living crisis, it is important for employers to consider all available options. Leading employers ensure their employees who balance work and family experience both wellbeing and productivity, with the knowledge back-up care and ongoing care solutions address both, as demonstrated in the findings here. Employer-sponsored care solutions also addresses the age-old childcare trilemma: ensuring supports are available, accessible and affordable.

Our experience with our client partners demonstrates that a well-developed Work+Family

Strategy includes a full range of approaches, beyond those measured in this survey, and whose value is demonstrated through regular user feedback and through separate research we conducted in 2021 into the impact of parental leave programmes.

Evidence-based options include:

- Emergency back-up care for dependants of all ages
- Ongoing employer-sponsored childcare. This can be provided through:
 - workplace nurseries (which help make collaborative office spaces more attractive to parents) or
 - partnerships with our community nurseries to provide places that are local to the employee's home or workplace.
- Coaching for Parental Leave takers and returners, as well as for ongoing work and family life

- Managers' Best Practice advice and coaching covering parental leave, ongoing parents and carers
- Just-in-time, online solutions to support the parent transition for the team member and the manager, such as our Parental Leave Toolkit for employees and managers
- Provision of events and networks for parents and carers enabling shared advice and perspectives.
- All these are ideally delivered, as our data demonstrated, in a context of flexible working arrangements.

These evidence-based actions are already well-known to forward-thinking employers who – like Bright Horizons' clients – are committed to engaging and empowering employees as we navigate the new landscape of our post-pandemic world.

About Bright Horizons

What we do

We help to increase our clients' employee wellbeing, engagement and productivity, supporting career progression and improving recruitment and retention of talented and diverse workforces.

How we do it

We provide holistic solutions to the challenges facing parents and carers in the workplace today. They include comprehensive care services, coaching and development provision, digital resources, family network events, and manager/ organisational guidance. They address the practical, emotional and cultural needs of organisations and individuals. What we offer is good for employers and good for employees. **Everybody wins.**

Our History

For over 30 years, Bright Horizons has been supporting the evolving needs of working families. Through bespoke family care solutions, we are helping employers to anticipate the challenges facing their employees and equip them with the tools they need to thrive.

From workplace nurseries and hybrid worker solutions to back-up care when your employees need it most, our work and family solutions enhance your ability to attract and retain key talent, giving your teams the peace of mind and confidence to do their best work.

At Bright Horizons, we are always looking forward, creating and developing solutions to help businesses succeed and create a happier, more efficient and profitable workforce.

With operations in the US, UK, India, Australia and the Netherlands, we've a wealth of experience in supporting multi-national clients.

A partner, provider and employer of choice

We look forward to always delivering the best for our clients, families and our own employees.

- We monitor and evaluate our service provision through ongoing employee and client feedback to ensure its quality and positive impact. We provide our clients with access to live usage and engagement analytics.
- We have been consistently recognised as a UK Best Workplace by the Great Place to Work Institute every year since 2006.
- We have a strong commitment to corporate sustainability and, through our registered charity the Bright Horizons Foundation for Children, we work to transform the lives of children and families in crisis.

Our family of services includes:



Our award-winning **Back-Up Care** network, which saves our clients over 80,000 days in productivity each year



One to one **Virtual Tutoring** in Maths and English for children (ages 4-16 years) accessible through the Back-Up Care benefit



Work+Family Space, an easily searchable hub of information, resources and advice on a wide range of work and family topics



Coaching & Development Solutions to help businesses retain and develop employees through life's big transitions, including the parent transition and becoming a carer – supporting your people to thrive at work and at home



Parental Leave Toolkit, our unique digital coaching solution for new parents and the managers who support them



Nursery Partnerships, which can save employees 30% on nursery fees at no cost to their employer



Workplace Nurseries, providing parents with reassuringly high-quality and convenient care at or near their workplace

For further Bright Horizons' research papers visit:
solutions.brighthorizons.co.uk/resources/research

For upcoming and recorded best practice events:
solutions.brighthorizons.co.uk/resources/eventsandseminars

Get in touch to discover how we can help
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