

Modern Families Index

2023

Spotlight Report



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Who took part?

Our survey population:

- 3,000 working parents, with at least one child aged 0-17 years, were randomly selected from across all UK regions and industry sectors.
- 1,455 identify as male, 1,545 identify as female. No participants selected 'Other' or 'Prefer not to say'.
- 76% work full-time, 24% work part-time (29 or fewer hours per week).
- 22% also have a caring responsibility for an adult or elder.
- 80% are in an opposite sex couple sharing a household.
- 6% are in a same-sex couple sharing a household.
- 13% are a single parent household.
- 38% are aged 18-34, 58% are 35-54 and 4% are over 55.



Key Finding 1:

Working parents expect, and need, more than ever from their employers...

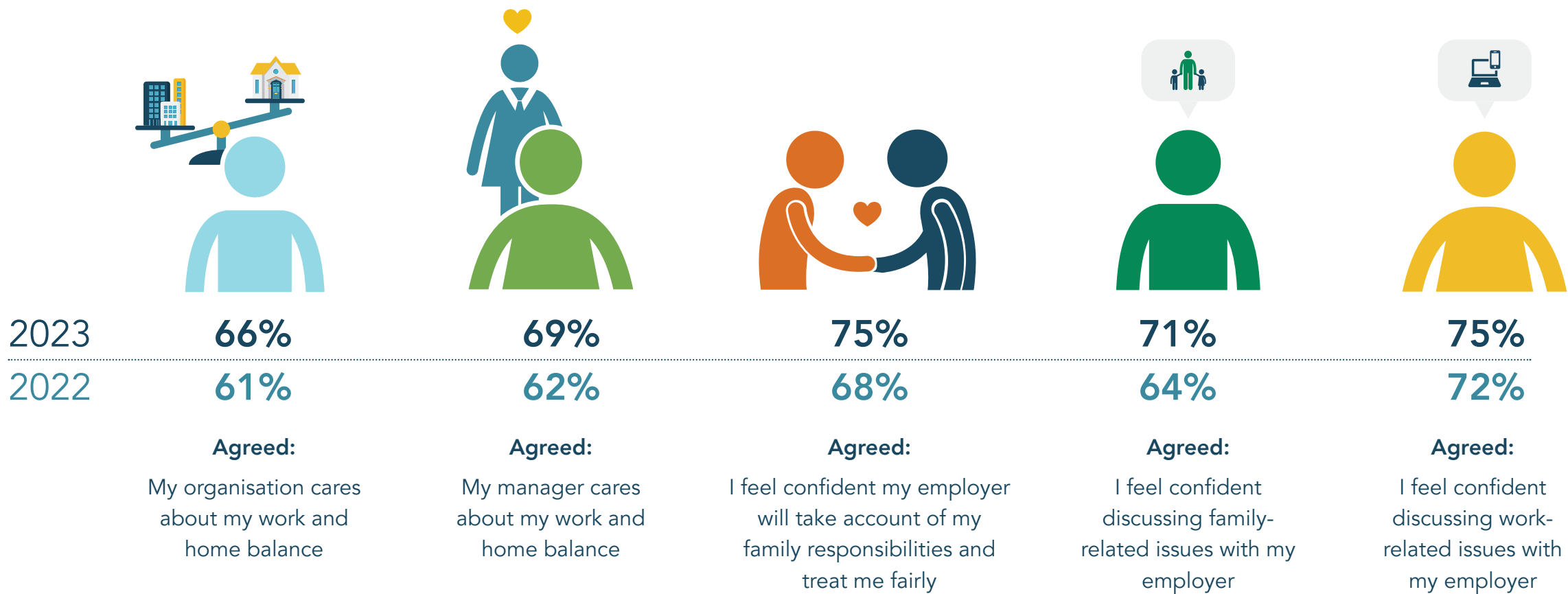
Family visibility in the world of work is here to stay. Coupled with an intense focus on wellbeing, there are growing expectations of support from family-friendly employers.

More employees feel their organisation cares about their work and home balance. This reflects the trend of employers recognising the need to support families and enabling employees to have confidence they can still progress while working flexibly.

The flight risk in this year's survey remains at nearly 4 in 10 (38%) likely to seek new employment in 2023.

As employees find family challenges easier to raise in the workplace, employers now have to work harder to differentiate their Employee Value Proposition.

More employees feel their organisation cares about their work and home balance.

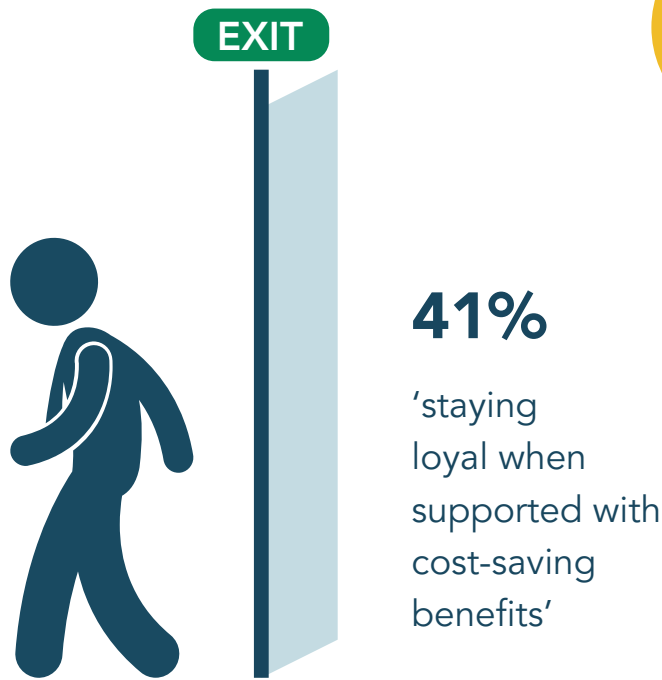


Key Finding 2:

Key moment to strengthen employee benefits as a retention tool...

Employees are looking to their employers and to the Government for more support with the financial and practical cost of working.

These costs include childcare and elder care as well as other factors such as commuting or heating home offices. 41% said benefits or services from their employer that help with the cost of living would make them more loyal and likely to stay.

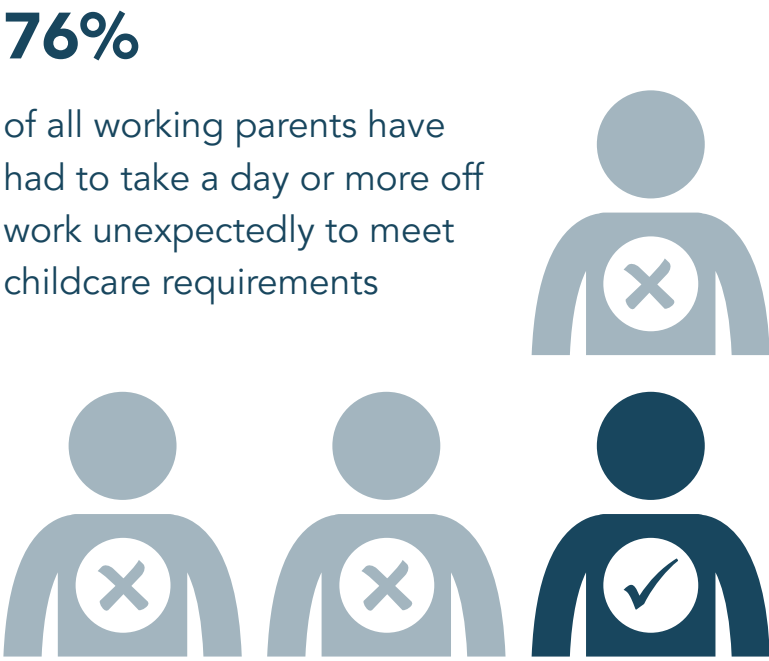


Key Finding 3:

Dads are seeking recognition of their hands-on parenting role...

As emphasis on fairness and inclusion grows overall, dads are increasingly speaking up about the impact of combining work and family.

While men are finding it easier to talk to employers about family-related issues than before, it is still easier for women to do so. 67% of men and 74% of women are now confident talking to their employer about family-related issues.



Key Finding 1: Working Parents Expect More Than Ever From Their Employers

Most employers have stepped up their support for home life in recent years. As a result, all employers now need to work harder to differentiate their Employee Value Proposition. There has been notable growth in the provision of benefits and services that help employees manage family life. This year, over 3 in 4 (77%) now describe their employer as supportive of family.

It's now almost as easy to talk about family issues at work as it is to talk about work issues at work. Seven in 10 (71%) feel confident discussing family-related issues with their employer (64% in 2022) while 75% feel confident discussing work-related issues (72% in 2022).

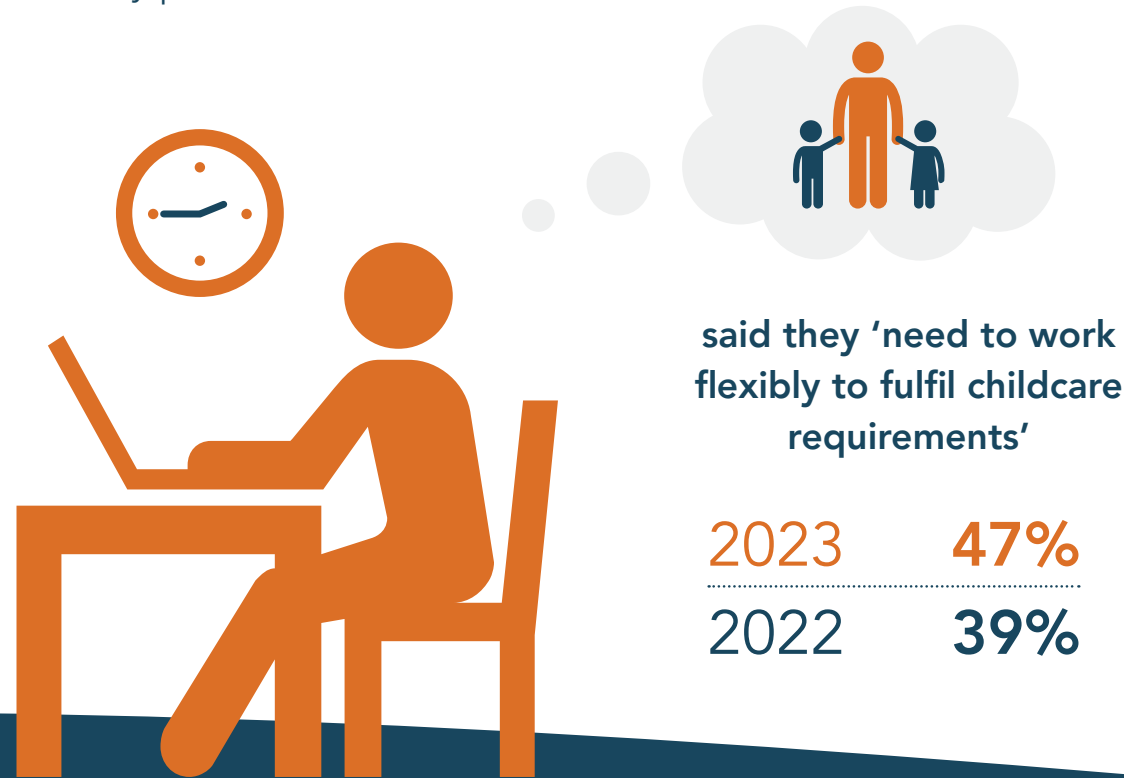
In this section we explore some priority expectations.

Childcare commitments drive working arrangements

When asked their reasons for working flexibly, childcare was the top driver for 47%; that's 8 percentage points up on last year.

Other reasons for working flexibly include:

- 'My employer has embraced flexible working and most of the workforce works flexibly' (36%);
- 'To manage my wellbeing' (29%);
- 'My employer has required me to work flexibly' (22%);
- 'To pursue outside interests / hobbies / other commitments' (14%);
- 'To fulfil my eldercare / adult care commitments' (12%); and
- 'To meet my pet care commitments (9%).



And it's hard to manage without formal childcare

Bright Horizons' recent [Parents Under Pressure survey](#) (September 2022) found that over half of parents (53%) are now either occasionally or regularly doing without childcare support while working. Cost and access were key reasons. In this Modern Families Index, 39% overall felt that working from home without childcare had a negative, or significantly negative, impact on productivity. This sense of disruption peaks for parents of children aged 3-5 (49%).

Negative impact is highest amongst those in partner or board level director roles:

- Partner / board level director: 76%;
- Senior manager / director below board level: 48%;
- Middle manager: 47%.

Lack of Childcare impacts Productivity

Working from home doesn't negate the need for childcare. Nearly 4 in 10 found that doing both negatively impacts their productivity. Quality childcare also supports the social-emotional development of young children.

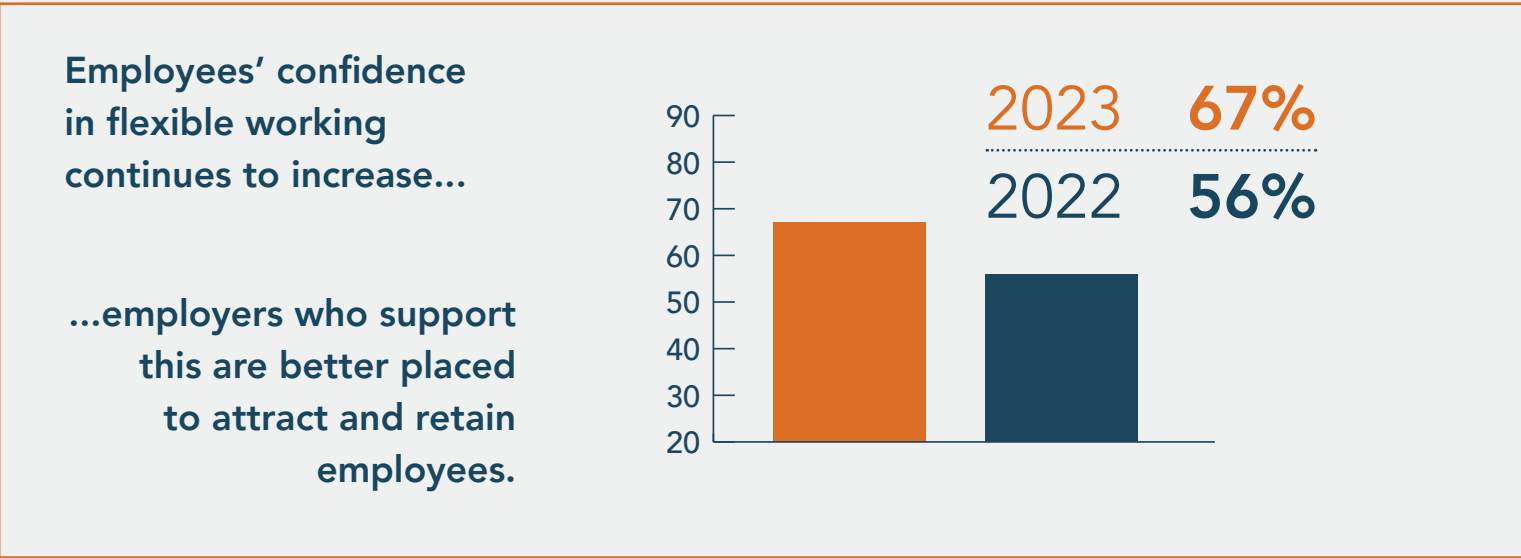
Productivity is negatively or significantly negatively impacted	39 %
Productivity is not negatively impacted	30 %
N/A – I don't look after children while working from home	31 %

Employees expect flexibility AND career progression

Many professions have demonstrated they can work productively across a range of hours and locations (always mindful that certain roles and sectors need a physical presence onsite and at specific times). With legislation now on its way for a 'Day 1 Right to Request' flexible working, employers are keen to demonstrate that high-value jobs can be done flexibly, and without impacting career progression pathways.

In last year's Modern Families Index 2022, 56% believed they could progress their careers while working flexibly; and 9% disagreed. This year, two-thirds (67%) are optimistic that career success and flexibility can go hand in hand, with 8% disagreeing.

Last year, 17% selected 'I am happy to stay at the level I am / I am not looking for career progression', a statistic which has fallen to 9% this year, indicating that the appetite for career progression is firmly back.



The belief in being able to progress career while working flexibly is particularly marked in the younger generations. Among those aged 18-34, 71% see the potential for career progression with flexibility while 66% of those aged 35-54 and just 55% of those aged 55+ agree.

Employers should be prepared for the flexibility expectations of the younger workforce to continue throughout their careers.

Employees value the central workplace as well as remote working

Employees do not favour an all-or-nothing working arrangement, but a blend. 4/5 (80%) say they feel trusted by their employer/line manager to manage their time and deliver their work. There has been a rise in those who view hybrid (combining onsite and remote) as their preferred working arrangement. The figures suggest this increase comes mainly from those who previously saw hybrid as 'not applicable' to them, as well as a slight reduction in those who would wish to be 100% office-based.

There has been no increase in those wishing to be based fully at home. So the desire for collaboration opportunities, visibility for career progression and social appeal of the workplace remain strong.

Overall, more working parents have the opportunity to work flexibly (whether in hours or location) than before. Over 4 in 10 (41%) indicated 'I am now working more flexibly than a year ago' while just a third (34%) had stated this in 2022. This year just a fifth (21%) said 'My role or employer does not allow for flexible working' whereas over a quarter (27%) said this in our 2022 study. There will, of course, always be vital front line roles which rely on presence in place and time.

19% would want to work in the office 100% of the time

18% would want to work from home 100% of the time



57% would want hybrid working

The remaining **6%** described hybrid as 'not applicable'

Parents of older children are worried & need support

In the last two years, employers have been paying much more attention to parents of older children, including recognising their ongoing concerns relating to lockdown education gaps. Forward-looking employers have long understood that supporting parental leave returners is vital, but the balancing act is far from done at that stage. In a tight labour market, parents are now also looking to their employer for empathy and practical support with their school-age children, including teens.

Around half of parents have concerns about their child/ren’s mental health

Parents are consistently concerned about their children’s mental health from the age of 6-17. Over two-thirds of leaders and senior leaders are concerned or very concerned.



More employers have become involved in providing direct access to virtual tutoring as an employee benefit. These two quotes (among many) from Bright Horizons client employees underline both the need and the impact of addressing this:

- “It’s a life-saver - we are very happy as a family to have this benefit. I can carry on with my work at the same time knowing my daughter is getting learning support - from someone she actually listens to, too!”
- “As a working mum I do not always have the time to fully support my children with their homework, particularly with my youngest child as she has dyslexia. This benefit is great, provides me peace of mind that they are getting on a weekly basis the additional help they need.”

Parents have ongoing concerns about their children’s wellbeing			
Educational catch-up	Social skills	Physical health	Mental health
48%	46%	43%	50%

Half of all parents have worries about their children’s mental health and over 4 in 10 have concerns over educational catch-up, social skills and physical health. This remains true across all child age groups.

These figures have all improved on 2022, when the same set of figures was 55%, 52%, 46% 54%. However, they remain high, particularly regarding mental health and educational catchup. Notably, they still outstrip parental concerns over burnout and mental health for themselves or their partners, which is also high, at 28% and 27% respectively.

Comments added to the survey included:

Educational Catch-up:

“I’m concerned that they are supported if they need any additional help with subjects they may have fallen behind with during lockdown.”

“A lot of content has been missed due to Covid time off and that doesn’t seem to have been covered much since attendance has gone back to in person full time. I am a teacher myself so I am quite surprised how secondary education does not appear to be bridging the knowledge gap leading up to GCSEs.”

Social Skills:

“Children do not know how to communicate with people anymore, everything is too computer orientated.”

“As I work so much, I am unable to take them out sometimes to see their friends or even just go to the park.”

Physical Health:

“I’m trying to keep them active and reduce screen time.”

“I’m unable to afford sports clubs.”

Mental Health:

“My child suffers severe anxiety following the pandemic.”

“I’m always conscious of my daughter’s mental health as young children are more aware of the pressures on them.”

Key Finding 2:

Key Moment to Strengthen Employee Benefits as a Retention Tool

Many employers have already put packages of support in place for their employees. In addition to helping with everyday life, there is a new focus on expenses that reflect the cost of working. For onsite work this can include help with the costs of commuting, or reducing the need to travel; for remote work, it might include help with home-related costs. For either, the cost of working includes access to good quality childcare and, as we saw above (p4), productivity is impacted when childcare is not available.

Recognising this connection, employers are investing in the provision or subsidy of care. When quality childcare is available to employees, this not only helps parents to be more productive when working but also supports the social-emotional development of young children who thrive on routines, and the expert attention of skilled educators. Employers' action in this area is driven both by a desire to support employees and a need to engage and retain talented people.

In this section, we highlight relevant findings including the ongoing flight risk as nearly 4 in 10 employees are still looking out for a new job. We then explore the types of support that employees most value and the critical contribution of care solutions in choosing a new role or employer.

In addition to data here on roles and sectors, the demographic declaring the third highest likelihood of seeking new employment overall was among the **122 men** in our survey who are in a same-sex couple where **75% are likely to seek a new job**. When asked what benefits would boost loyalty, they selected **'Benefits or services that help with cost of living' (55%)** and **'Advice or support on family wellbeing' (55%)**. Any loss of diversity in an organisation means less diversity of thought which can negatively impact innovation, performance and governance; all factors known through established research to be enhanced by a diverse workforce.

The flight risk remains, especially in senior roles.

In our 2023 Modern Families Index, the proportion of people likely to look for new employment in the next 12 months is the same as in 2022: 38% or nearly 4 in 10. For men, this rises to 45%.

The risk of leaving for another employer is higher in more senior roles. Worryingly in terms of leadership, the three role-holders most likely to look for new employment in the next 12 months are: Partner / Board level director 69%; Managing Partner / Chief Executive 48%; and Other senior manager or director below board level 47%.

There is also a strikingly high risk of attrition among carers (of elderly parents, or of disabled or unwell adult child or partner) at 62%. Others with a raised risk of seeking new employment were those expecting a new child (41%) and parents of children aged 6-10 (39%).

Sectors with more than 40% likely to seek a new employer are:

- Biotech, Pharmaceuticals, Life Sciences & Scientific Research 76%
- Business or Professional services 59%
- Consumer Services 58%,
- Arts, Culture, Design, Entertainment, Media & Publishing 58%,
- Banking and Financial Services, 47%,
- Real Estate 46%,
- Retail, Wholesale and Franchising 42%,
- Technology, Software and Fintech 41%,
- Manufacturing, Consumer Product and FMCG 41%.

Cities with a greater than 50% flight risk among employees are: London 57% and Liverpool 54%.

Men 45%
Women 30%

Nearly 4 in 10 (38%) overall are likely to look for new employment in the next 12 months



Men 32%
Women 49%

Benefits and services that help with the cost of living are the top reasons for staying, above professional development and training. This is particularly true for retaining female employees.



Practical family supports, autonomy, development and advice services all boost loyalty

Over half (54%) overall say they have concerns for either themselves or their partner about the cost of living/household bills. When asked ‘Which of the following supports from employers makes / would make employees loyal and likely to stay?’, with over 20 options given, the top choices were as shown.

Consistently across genders, working families indicate that help with the cost of living and other family supports, as well as more autonomy and professional development will boost loyalty.

Ranking	Benefits, services and supports making employees likely to stay	% Selected
1	Benefits or services that help with cost of living	41%
2	More training /professional development opportunities	29%
3	More autonomy over my hours of work	28%
4	Enhanced parental / dependant leave	27%
5	Ensure line managers have the knowledge / tools to support me in managing my work life balance	24%
=6	Employer-subsidised regular childcare	22%
=6	Advice or support on my own wellbeing	22%
=6	Offer more choice in the benefits I want/need from package offered	22%
9	Advice on successful hybrid or flexible working	21%
10	Hold employee wellbeing as a clear and visible area of focus	20%
11	Employer-subsidised back-up or emergency childcare	19%
12	More autonomy over my location of work	18%

Autonomy over working hours scores higher than autonomy over location; and both regular childcare and back-up childcare feature among the top forms of support encouraging loyalty, as well as forming part of the cost-of-living support.

The job-holders who felt that cost of living help would impact their loyalty most were: Unskilled manual worker 55%; Operational/administrative/clerical/other worker with no managerial responsibility 54%; and, the third-highest: Partner / Board level director 49%. This shows the breadth of desire for support transcends level of seniority.

Bearing in mind the 69% flight risk for Partners / Board directors noted previously, they also rated ‘Advice or support on family wellbeing’ as their second loyalty-boosting benefit at 46%, so the opportunity exists to re-engage senior level, often mission-critical, people through higher levels of support and advice for family wellbeing.

We invited comments: ‘Looking ahead over the next 3-5 years, are there any other, or more specific, forms of support your employer could provide that would be important to you’.

Themes for additional support included:

Help with covering ad hoc childcare needs

“Childcare help or extra leave days if you have childcare needs for children under 12.”

Professional development opportunities

“A focus on how to progress in my career, with a clear pathway for progression.”

Continued flexibility/work-life balance

“Flexibility so I can be available to help my elderly grandparents when needed.”

Childcare help

“Definitely some kind of childcare help, so I can work more.”

Pay/salary increase

“A pay increase in line with inflation.”



Families are cutting back on spending

We asked whether families are cutting down on spending due to the cost of living. Just 11% selected 'we have not / will not cut back'.

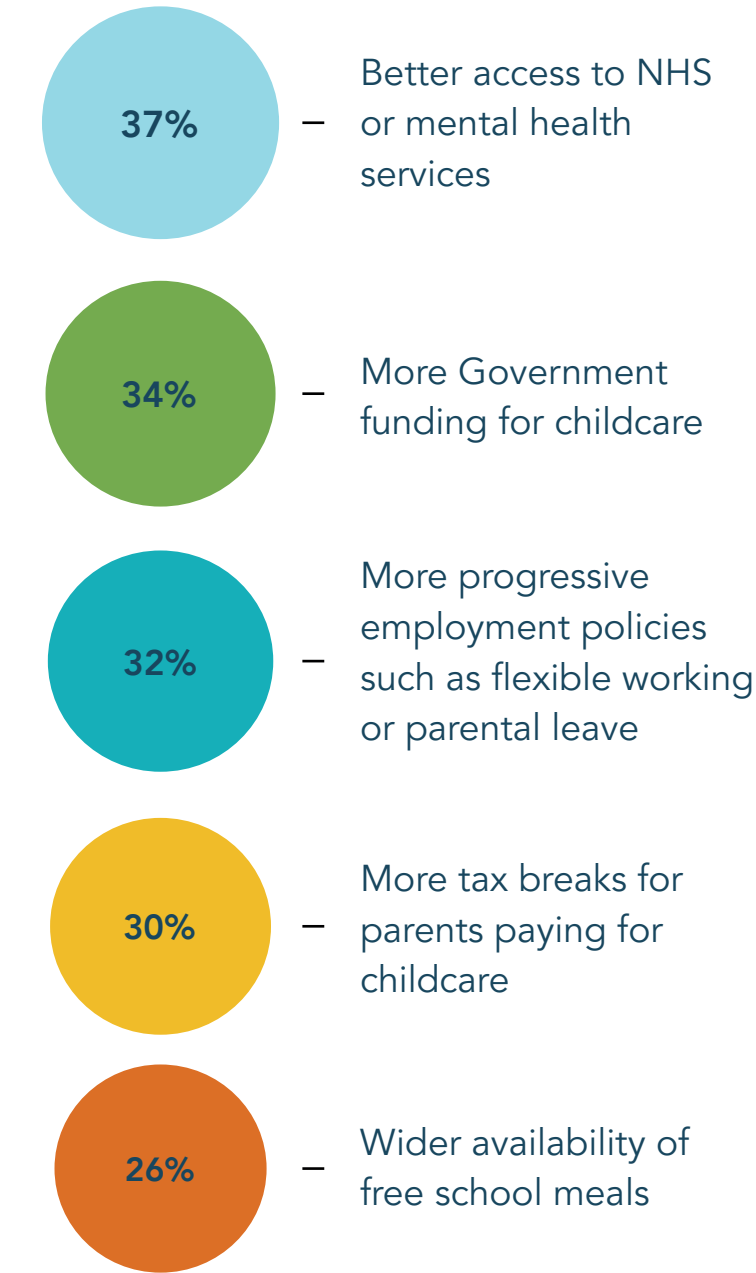
41% said they have or will cut down on heating as the cost of living rises (second only to cutting down on meals out/takeaways).



Item	How many cutting back
Meals out at restaurants / take aways	51%
Heating to reduce bills	41%
Social gatherings e.g. pub, clubs, coffees	38%
Family holidays abroad	37%
Days out during school holidays	28%
Family holidays in the UK	27%
Range, quality or quantity of family food at home	24%
Alcohol consumption at home	24%
Gym memberships / other fitness activities for self / partner	23%
Entertainment e.g. satellite channels / movie streaming	22%

When we asked: 'How, if at all, would you like to see the UK government supporting you and your family?', over 90% felt that the government should provide more family support.

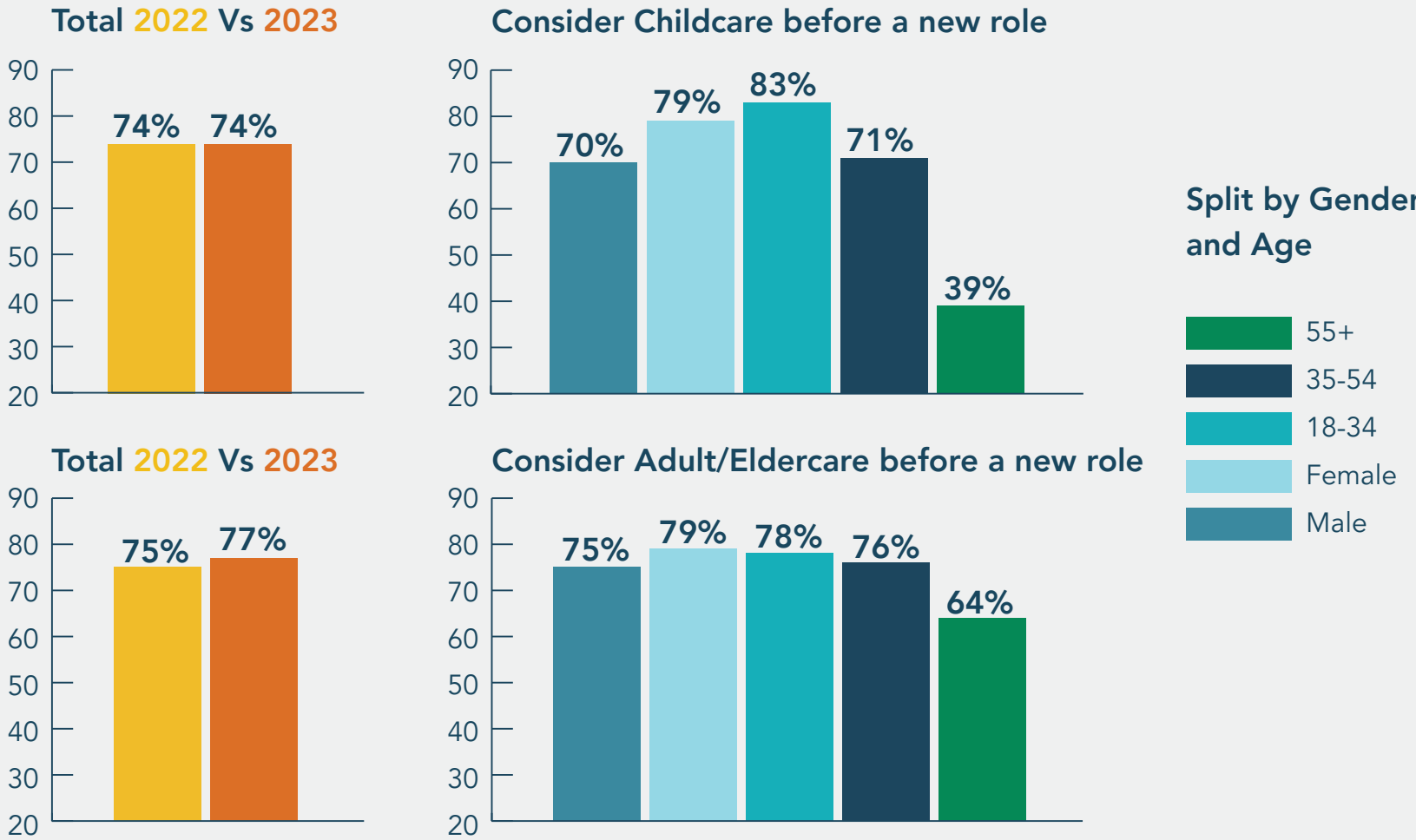
The top five wishes were:



Providing childcare and eldercare support helps attract and retain talent

Reinforcing our similar findings from 2022, three-quarters of working parents and carers carefully consider their care options before accepting a new job or promotion. Both childcare and adult/ eldercare concerns are highest in 18-34 age group.

Over three-quarters (77%) of those with eldercare responsibilities consider eldercare support before accepting a new job or promotion (75% in both 2021 and 2022). To attract and retain the best of the sandwich generation, smart employers need to consider eldercare provision.



The survey also revealed that families with children aged 0-2 are currently spending 23% of their monthly take home income on childcare, and this decreases only slightly to 20% for children aged 3-5. This underlines the potential for providers and employers to work together in finding solutions that enable families to thrive at home and work. There is a key opportunity for innovation to develop programmes which are cost-neutral for employers and cost-saving for employees.

Key Finding 3: Dads Are Seeking Recognition of their Hands-on Parenting Role

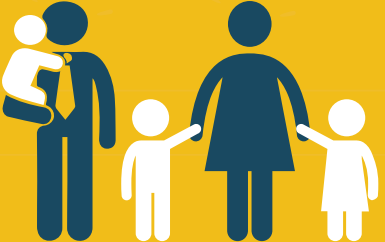
Men are speaking up about their parenting and caring responsibilities and they expect employers to recognise their full involvement in family life. Three-quarters of working fathers (and mothers), have had to take a day (or more) off work unexpectedly to meet childcare commitments in the last year.

In this section, we explore findings showing fathers want to do more at home, that they find it distracting when caring for children while working and that they worry (even more than mothers) about their children’s development.

Who’s holding the baby?

Working fathers see themselves as fully involved at home.

On average, 3 in 10 (31%) across genders say they share the childcare load equally.

	Gender	
	Male	Female
I do more childcare	36%	75%
My partner does more childcare	24%	3%
My partner and I share the childcare equally	39%	22%

*It’s worth noting that the survey respondents are randomly-selected and not in relationships with each other, and that 6% are in same-sex couples.

A mismatch in perception that we saw last year persists. Whatever the objective division of household labour actually is, fathers believe they are doing more childcare than their partners acknowledge. Interestingly, when asked ‘Are you happy with the balance of childcare in your family?’, two-thirds (68%) overall said ‘Yes’, while 14% selected ‘No, I would like to do more’; and a similar 13% indicated ‘No, I would like my partner to do more’. By gender, 19% of men said they would like to do more themselves (vs 8% of women) and 20% of women say they would like their partner to do more (vs 7% of men).

Men are particularly impacted by a lack of childcare when working from home

Under the first Key Finding (p4), we noted that 39% of working parents overall find that a lack of childcare while remote working has a negative impact on productivity. The gender split here is noteworthy.

Of those who regularly care for children while working from home, 60% of men and 53% of women find that caring for children while working from home impacts productivity. Interestingly, 76% of men and 63% of women overall said they looked after children whilst working from home.



If you are ever looking after your children while working from home, does this negatively impact your productivity?	Gender	
	Male	Female
Productivity is significantly negatively impacted	20%	17%
Productivity is negatively impacted	40%	36%
Productivity is not negatively impacted	40%	48%

When parents worry that their productivity is reduced, it is not only work goals that may suffer. Parenting overall and day-to-day interactions with children will also be less satisfactory and family wellbeing is likely to be strained. When employers can help with childcare, or with back-up care for ad hoc needs, the pressure can be eased all round.

Fathers are more concerned about their children’s development

We saw under Key Finding 1 (p6) that parents have real worries about their children’s ongoing development. Men report more concerns than women around aspects of their children’s life.

	Fathers’ Vs Mothers’ Concerns about their Children			
	Educational Catch-up	Social Skills	Physical Health	Mental Health
Fathers	58%	57%	53%	57%
Mothers	38%	35%	33%	42%

What can employers do?

Solution for Key Finding 1: Working parents expect, and need, more than ever from their employers...

Employers now need to work harder to differentiate their Employee Value Proposition as family-friendly. Strategies pursued by leading employers include:

1. Recognise that caring for children is the biggest driver of working arrangements. Empower parents to work flexibly in ways that align with their childcare and enable career success (p5).
2. Pay attention to parents of older children. This can include access to educational support, responding to parents' ongoing concerns (p6).
3. Recognise that employees value a blend of working arrangements with office working still popular. Ensure that office working is facilitated by family supports, such as onsite or ad hoc childcare.
4. Have more open conversations. Now is the time for authenticity, and family is a very levelling topic, regardless of position and role. Highlight working parents at all levels, let them tell their stories, and signpost the resources you've provided that help them thrive.

Solution for Key Finding 2: Key moment to strengthen employee benefits as a retention tool...

Care is part of the cost of working. Over half of employees are struggling with the cost of living which means this is a decisive moment for employers to provide support and enhance the employee experience.

1. Help with care: Facilitating ongoing childcare and ad hoc or back-up care is a key solution for employers. Ensure the cost-saving impact of your benefits is clear and promote them consistently to all relevant audiences.
2. Employees are cutting back at home and they tell us that benefits which save money and support development make them more loyal. Enable your employees to follow their career pathways by providing benefits and supports that remove the barriers. Give your employees as much autonomy as possible and clear development routes.
3. Three-quarters of those with caring responsibilities consider care needs before accepting a new job or promotion. Make your family supports visible to new hires, without having to ask.

Solution for Key Finding 3: Dads are seeking recognition of their hands-on parenting role...

It is clear that family takes many different forms and family roles are not defined by gender.

1. Make sure you're not left behind, review your approach and offerings to ensure they are gender inclusive. If you are not already in tune with current and future trends, make 2023 the year your family policies recognise parents of all genders and circumstances.
2. Review not only what you offer but how you communicate it. Be sure that dads are aware of their access to flexibility and care solutions.
3. Reduce the impact of unexpected absence due to childcare breakdowns. Promote your back-up care options to all parents and carers.
4. Understand the ongoing concerns working parents, and fathers especially, have regarding their children's mental health and need for educational catch-up. Target men as well as other genders in any parents' network events and in educational support you provide.

The 2023 Modern Families Index shows a nation of working parents and carers seeking more practical support in meeting the needs of family life alongside working. There have been gains in the areas of flexibility, the visibility of family, and the possibility of speaking up about family challenges. Now the need is for real hands-on supports that help with the cost of living and which address the risk of losing talented people. Any help employers can provide in areas such as childcare and eldercare, ongoing support for family life, and ensuring that all supports are gender-inclusive, will be strong enablers for both hiring and career progression.

About Bright Horizons

What we do

For more than 35 years, Bright Horizons has been supporting the evolving needs of working families and their employers. We create, develop, and deliver solutions that remove barriers to performance, talent and diversity in our clients' businesses and help them succeed in their goals.

We address the wide range of challenges facing parents and carers in the workplace today, enhancing our clients' ability to attract and retain key talent, giving their teams the peace of mind and confidence to do their best work.

How we do it

Bright Horizons' services include workplace and partnership nurseries, coaching and development provision, digital resources, and manager guidance, plus back-up care for adults, children of all ages - and even pets.

We provide our clients with access to live usage and engagement analytics on their programmes, and also keep them updated with ongoing research findings and benchmarking data.

Who we are

- We have operations in the US, UK, India, Australia, and the Netherlands. 1,300 clients globally, more than 400 in the UK.
- We have been recognised as a UK Best Workplace by the Great Place to Work Institute every year since 2006, and actively committed to Diversity, Inclusion and Belonging, and to Mindful Business practices.
- We strive to minimise negative environmental impact guided by our Future Earth green agenda and, through our registered charity the Bright Horizons Foundation for Children, to make a positive difference in the lives of children and families in crisis.

Our family of services includes:



Reliable, flexible **Back-Up Care** options for children of all ages, adults and elders - and even pets - when usual arrangements break down or schedules change. Back-Up care is a trusted Plan B that protects productivity and supports wellbeing.



One to one **Virtual Tutoring** in Maths and English for children (ages 4-16 years) and also school entrance exam preparation. Tailored tutoring helps confidence and achievement, while easing parents' concerns about their child's education and mental health.



Work+Family Space, an easily searchable hub for all matters work and family, and a vital resource for busy workers. Filled with a world of information, tips, webinars and expert advice, there's something for everyone - whatever their life stage or personal situation.



Our innovative **Parental Leave Toolkit** is a digitised coaching solution delivering timely checklists and advice to the individual and their manager at every point in the journey, making a significant difference to return rates. Beyond the parent transition, we've developed tailored coaching programmes for our clients on many major life events.



Workplace Nurseries and Nursery Partnerships provide parents with reassuringly high-quality and convenient care at, or near, their workplace. The ultimate "sticky benefit" and a real game-changer for retention.

Get in touch to discover how we can help your business and your employees:

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