



VODAFONE #CHANGETHEFACE 2022

A debrief from the numbers lab February 2022

Background & Methodology

Research Objectives

Vodafone, as part of our #changetheface initiative wanted to commission some research to provide relevant and engaging content for thought-leadership throughout the year.

In partnership with the numbers lab, we collaborated on an online study of working mothers and fathers in the UK, South Africa, Italy, Germany, Spain and Turkey to understand the impact on working mothers in this new post-pandemic world.

Specifically we explored topics such as:

- The impact of Covid
- The impact of working patterns
- The role of their employer in support
- Their post-Covid plans and ambitions



C2 General

Research Audience

Family life profiling

- Those in **Europe** more likely to have **one child** families.
- Single parents more likely in UK and SA.
- Tend to see a **higher social class outside of Europe** whilst keeping in mind survey criteria.



	UK (a)		South Africa (b)		Italy (c)		Germany (d)		Spain (e)		Turkey (f)	
	Mother	Father	Mother	Father	Mother	Father	Mother	Father	Mother	Father	Mother	Father
Average Age	39	43	33	36	38	40	36	39	39	43	39	37
One child	46% (b)(f)		36%		47% (b)(f)		54% (a)(b)(c)(f)		50% (b)(f)		36%	
Two children	39%		42% (d)		43% (d)		33%		42% (d)		40%	
Three + children	16% (c)(e)		21% (a)(c)(d)(e)		11%		13% (e)		8%		25% (a)(c)(d)(e)	
Single Parent	34% (c)(d)(e)(f)		33% (c)(d)(e)(f)		15% (f)		25% (c)(f)		25% (c)(f)		9%	
Age of children: 0 - 6	57%		87% (a)(c)(d)(e)(f)		58%		73% (a)(c)(e)		57%		76% (a)(c)(e)	
Age of children: 7 - 11	42%		48% (c)(d)		38%		38%		43%		47% (c)(d)	
Age of children: Over 12	67% (b)(d)(e)(f)		48%		61% (b)(d)(e)		46%		50%		55% (d)	
ABC1	63%		73% (a)	(c)(d)(e) 67%		(d)(e)	59%		60%		82% (a)(b)(c)(d)(e)	
C2DE	37% (b)(f)		27%	7% (f) 33% (b)(f)		(b)(f)	41% (b)(c)(f)		40% (b)(c)(f)		18%	

 \uparrow (x) \downarrow (x) Significantly higher or lower vs specified subgroup @ 95% confidence interval

C2 General

Research Audience

Workplace profiling

- Fathers are almost always found to be currently working Full Time and trend towards more senior level roles.
- Similar levels of **self employment** across regions.
- Wide range of **sectors** worked in.



	UK (a)		South A	frica (b)	Italy (c)		Germany (d)		Spain (e)		Turkey (f)	
	Mother	Father	Mother	Father	Mother	Father	Mother	Father	Mother	Father	Mother	Father
Full Time	55%	89% ↑	73%	78%	55%	92% ↑	47%	93% ↑	66%	95% ↑	86%	87%
Part Time	43%	9%↓	21%	18%	41%	8%↓	49%	6%↓	29%	5%↓	12%	12%
Self Employed	19%	23%	28%	23%	33%	30%	16%	13%	19%	24%	43%	40%
Return to Work	12%	4%↓	16%	11%	18%	2%↓	14%	3%↓	13%	2%↓	9%	3%↓
Entry or junior level	23%	14%↓	24%	16%	17%	6%↓	13%	8%	15%	7%↓	9%	8%
Mid-level	50%	54%	49%	52%	54%	63%	62%	71%	55%	57%	46%	51%
Senior-level	14%	28% ↑	18%	28% ↑	19%	29% ↑	11%	14%	20%	35% ↑	44%	37%
Top Sectors	Healthcare	Construction	Education	Construction	Professional services	Professional services	Healthcare	Retail	Professional services	Professional services	Education	Education
	Retail	Retail	Healthcare	Sales	Healthcare	Construction	Retail	Sales	Sales	Construction	Retail	Engineering
	Education	Banking	Retail	Professional services	Education	Banking	Education	Engineering	Hospitality	Retail	Healthcare	Construction

 \uparrow (x) \downarrow (x) Significantly higher or lower vs **MOTHERS** @ 95% confidence interval

Global Headlines

- Mothers are almost twice as likely to agree that they take the lion's share of childcare pressures and 1 in 4 spent less time on paid work as a result.
- Almost 1 in 2 Mothers felt their work performance was negatively impacted due to increased childcare pressures and 3 in 4 feel that it is crucial to plan ahead to achieve a balance in their week.
- With 3 in 4 mothers wishing they had more support through the Pandemic, employers play an important role in future to offer both emotional and functional support mechanics to all parents
- Mothers remain resilient 3 in 4 are confident that they'll be able to maintain a work life balance in future and the majority have a sense of positivity and ambition in themselves and their future careers

I loved being with my child more

- being a mum of a young boy and helping him learn more! Balancing work at home with a small child has been a challenge but I loved it (Mother, UK)

I was able to take care of my son, but I had to give up work (Mother, IT)

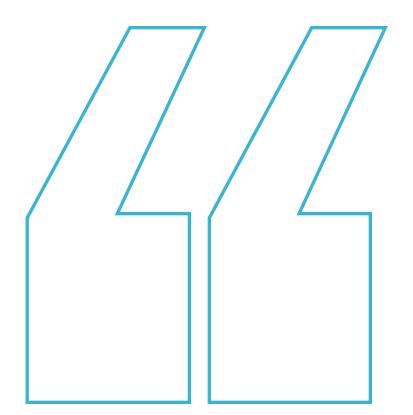
If the pandemic ends it would probably be a **very positive** thing for the balance between work and childcare (Mother, IT)

[We need employers] to allow us to **create our own work schedules** in terms of working at home within the work time and not discussing work after hours (Mother, SA)



THE COVID IMPACT









Mothers are almost *twice as likely* to agree that they take the *lion's share* of *childcare pressures* and *1 in 4* spent *less time* on *paid work* as a result – but most agree the *time spent* with *children* was a *positive*

I loved being with my child more - being a mum of a young boy and helping him learn more!

Balancing work at home with a small child has been a challenge but I loved it

(Mother, UK)

I was able to take care of my son, but I had to give up work

(Mother, IT)

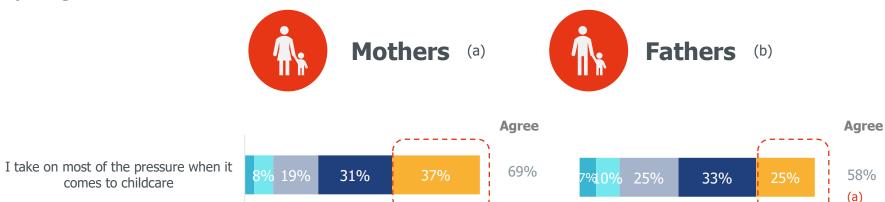


Pressures and stresses of family life are firmly felt by Mothers

However, there is general agreement that pressures are short lived, and that balance is possible!

Life Balance Pressures

5-point agreement scale



I feel stressed about balancing childcare with other elements of my life

comes to childcare

I don't think I'll ever be able to balance 16% 25% 22% childcare and other elements of my life

25%

37%

33%

9%<mark>14%</mark> 21%

(a)

62%

36% 16% 21% **15**% 28%

35%

(a) 5

 \uparrow (x) (x) Significantly higher or lower vs specified subgroup @ 95% confidence interval

Higher amongst single

(a)

(a)

21%

56%

(a)

"It made me feel very **stressed** because I felt unsure about how I would be able to look after everyone, support everyone **financially** and at the same time keep everyone safe and **healthy**." (Mother, SA)

"I thought I was doing enough for the kids, but I always felt that there was something missing. I thought I didn't spare enough time for them." (Mother, TK)

Q. Tell us how balancing looking after/doing things for your children and other elements of your life during the pandemic, made vou feel?

GLOBAL DIFFERENCES

- A different picture in Germany where pressures are more muted
- Highest in Turkey for both Mothers & Fathers
- Highest in Turkey even more so for Fathers

3%**12**% 18%

A lot of that stress pre-dates Pandemic life – but sense of resilience emerges



For the most part, things feels

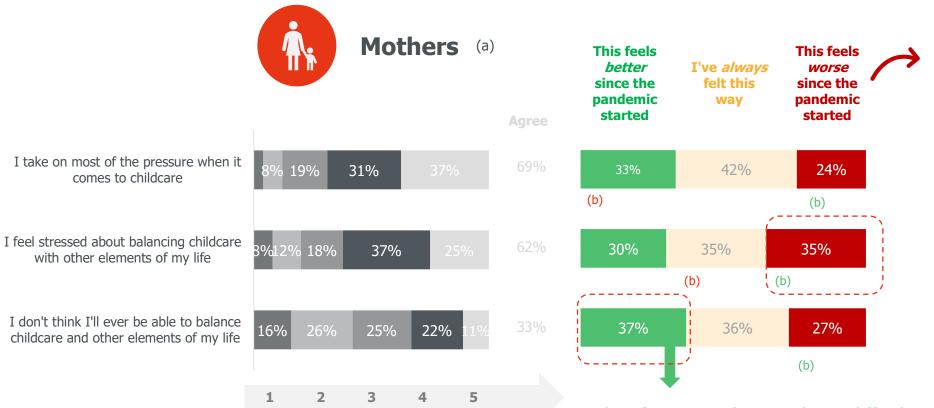
worse in the UK, whilst Italy

& Turkey were more positive

And a need for balance has been exasperated as parents try to juggle work, life and childcare

Life Balance Pressures

5-point agreement scale



There's a sense that pandemic difficulties have given Mothers a boost in positivity and sense of being able to overcome challenges

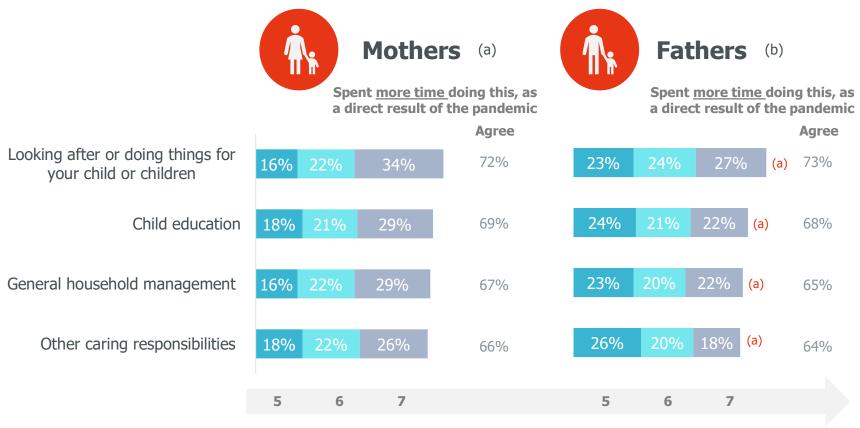
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Mothers & fathers alike spent more time running their home

Although mothers bore the brunt of the workload from childcare to household chores

Household Management – Time spent

7-point agreement scale



 \uparrow (x) \downarrow (x) Significantly higher or lower vs specified subgroup @ 95% confidence interval

B1. Please could you let us know, how much each area listed below has been impacted due to the pandemic? Base: Global Mothers = 1999 Fathers = 971 Internal

"I have dedicated more time to taking care of my children because we were confined to our home, and we did not have the option to go out and enjoy the Summer." (Father, SP)

"I felt **more responsible** in taking care of the home and children." (Mother, IT)

Q. Tell us how balancing looking after/doing things for your children and other elements of your life during the pandemic, made you feel?

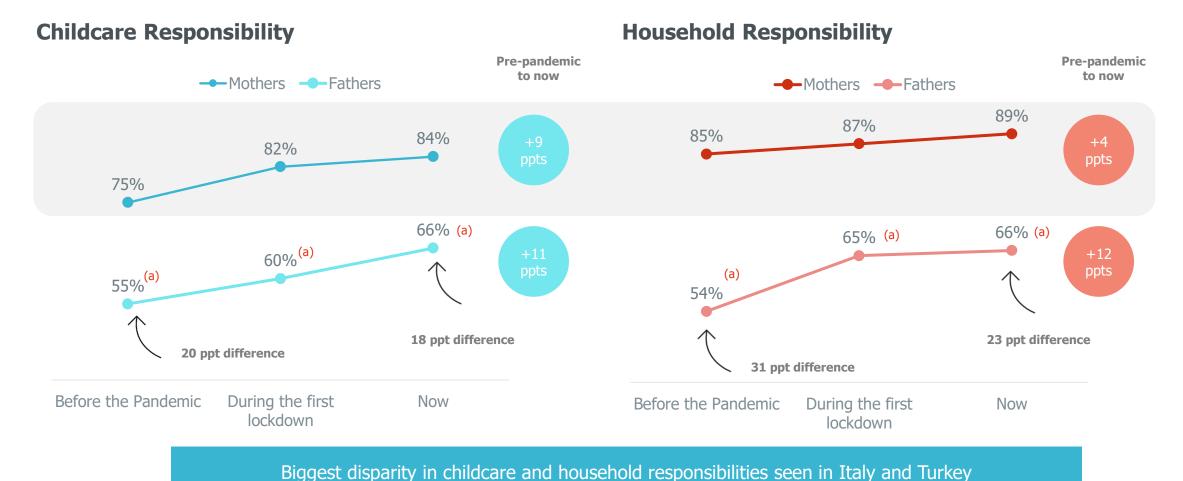
GLOBAL DIFFERENCES

- The gap is the widest within the UK
- The gap is the widest within the UK & Germany
- The gap is the widest within the UK & Germany
- The gap is the widest within the UK

The pandemic had a positive impact on the sharing of responsibilities



The gap on household responsibilities specifically is closing, but mothers maintain the lions share of childcare



Significantly higher or lower vs specified subgroup @ 95% confidence interval

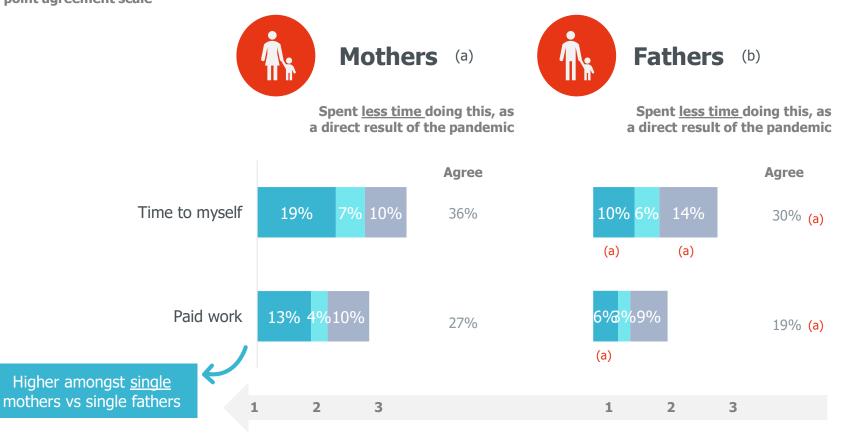


But Mothers also lost more; both their own time and paid work

Taking on the burden of childcare and household responsibilities has negatively impacted Mothers

Household Management - Time lost

7-point agreement scale



Significantly higher or lower vs specified subgroup @ 95% confidence interval

B1. Please could you let us know, how much each area listed below has been impacted due to the pandemic? Base: Global Mothers = 1999 Fathers = 971 Internal

"I felt **depressed** and **stressed** I think it was because I had less time to myself " (Mother, SA)

"I was stressed, I didn't have time for myself, just **cleaning**, **cooking**, **tidying caring** for my children 24 hours" (Mother, UK)

Q. Tell us how balancing looking after/doing things for your children and other elements of your life during the pandemic, made you feel?

GLOBAL DIFFERENCES

 Mothers in South Africa lost the most time to themselves and paid work too

Stress is universal – albeit to differing degrees

But the pressure was ultimately felt more by Mothers

Emotional Impact

5-point agreement scale

Higher amongst single mother's vs single fathers



Mothers (a)



Fathers (b)

Agree

I have felt stressed or overwhelmed as a

As a direct result of the pandemic, I have felt a lot of pressure with balancing all aspects of my life

direct result of the pandemic

The pandemic has brought financial challenges for me/my family

I don't know what I would have done without the support of friends and family to help with looking after my children



Agree

 \uparrow (x) \downarrow (x) Significantly higher or lower vs specified subgroup @ 95% confidence interval

"It's **stressful** because it's worrying not knowing what to expect because of the pandemic and because of the pandemic I lost my job." (Father, SA)

"Much more **under pressure** than pre-pandemic. (Father, IT)

"Financial and physical difficulties were very tiring." (Father, TK)

Q. Tell us how balancing looking after/doing things for your children and other elements of your life during the pandemic, made you feel?

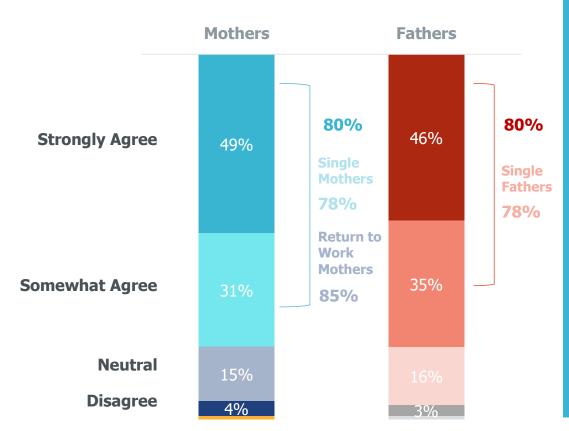
GLOBAL DIFFERENCES

- The gap is the widest in Spain & SA
- The gap is the widest in Italy
- Financial impact highest for all in South Africa & Turkey
- The gap is the widest within the UK

But positive exists! Mothers and Fathers agree!

Spending time with the kids, despite the challenges, has been a very clear plus (for most!!)

I've enjoyed spending more time with my children throughout the pandemic



"I genuinely enjoy doing things for my kids and spending time with them, it makes me feel good. I want to continue doing things for my kids" (Mother, SA)

"It makes **feel more connected to my kids,** because we have been
spending a lot more time together"
(Father, SA)

"I **enjoyed working home** so that I can spend more time with my children." (Mother, SA)

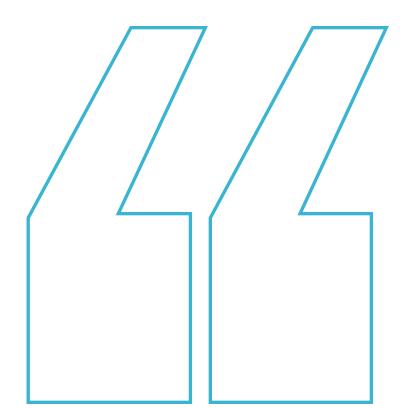
Q. Tell us how balancing looking after/doing things for your children and other elements of your life during the pandemic, made you feel?





IMPACT ON WORKING PATTERNS









Almost 1 in 2 Mothers felt their work

performance was negatively
impacted due to increased childcare
pressures and 3 in 4 feel that it is crucial
to plan ahead to achieve a balance

I was able to take care of my son, but **I had to** give up work

(Mother, IT)

The important thing was not to panic and try to **organize in the best way**

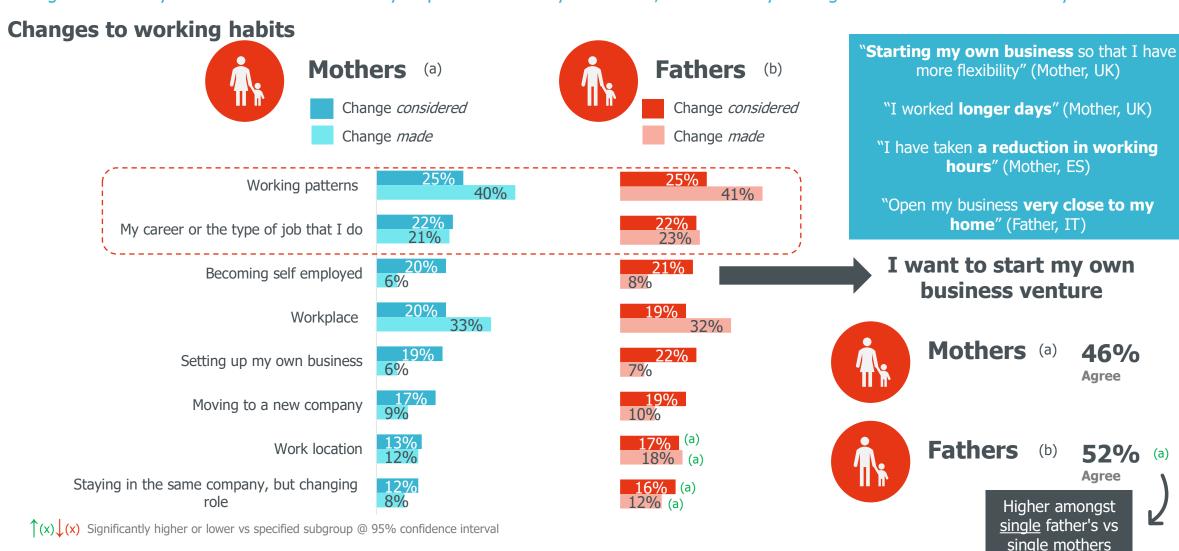
(Mother, IT)



Mothers and fathers alike considered changes to their working patterns



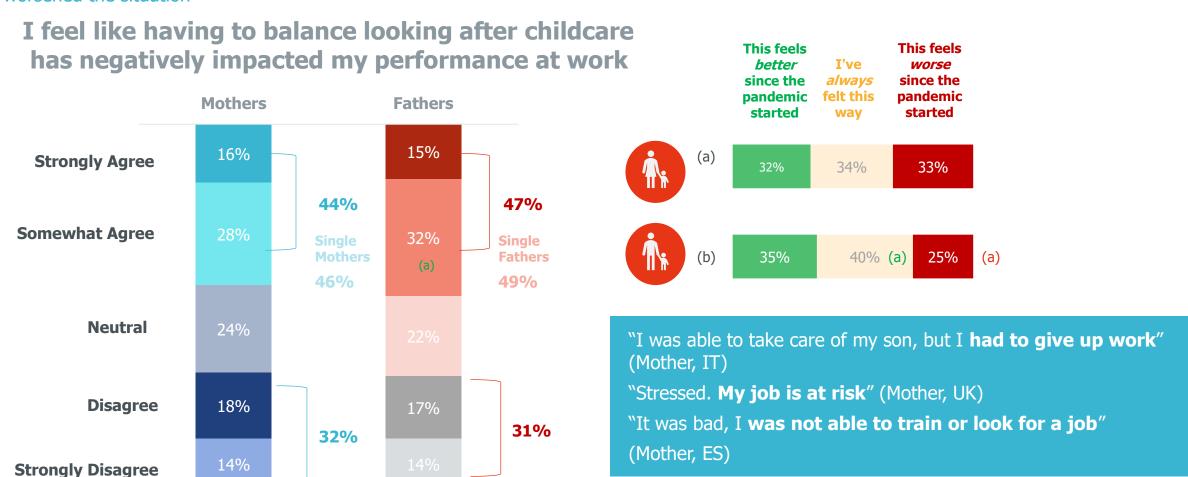
Changes were likely considered based on ability to provide flexibility & balance, but hesitancy amongst mothers to take too many risks



The majority felt a negative knock on from childcare pressures



2 in 5 Mothers felt their workplace performance was impacted, but are polarized on whether the pandemic has improved or worsened the situation



 $[\]uparrow$ (x) \downarrow (x) Significantly higher or lower vs **MOTHERS** @ 95% confidence interval

Q. Tell us how balancing looking after/doing things for your children and other elements of your life during the pandemic, made you feel?

Planning is crucial for Mothers to manage their week

Flexible working hours are a necessity for most, with Fathers altering their hours to make things work

WFH Pressures

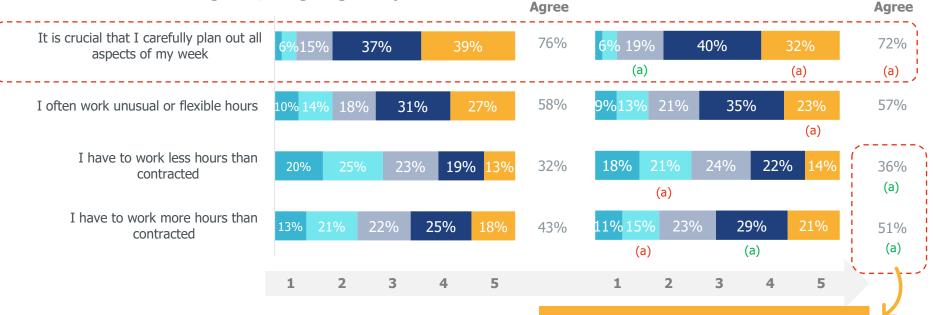
5-point agreement scale





In order to a balance looking after / doing things for my children...

 \uparrow (x) (x) Significantly higher or lower vs specified subgroup @ 95% confidence interval



Sig higher amongst fathers in the UK

"Lots of **planning** and **arrangements**." (Mother, DE)

"It made me know I can do things by myself with planning." (Mother, UK)

"The important thing was not to panic and try to organize in the best way" (Mother, IT)

Q. Tell us how balancing looking after/doing things for your children and other elements of your life during the pandemic, made you feel?

GLOBAL DIFFERENCES

Particularly strong in Turkey

- The gap is the widest within the UK
- The gap is the widest within the UK

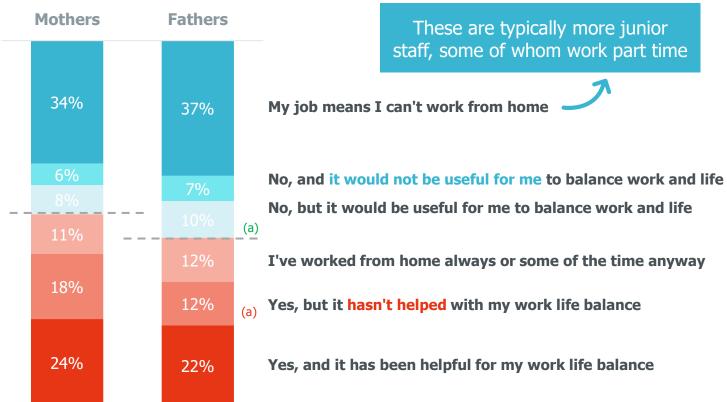
WFH behaviour is consistent, but it hasn't been as helpful for Mothers



Very few people who want to WFH are not currently doing so



Working from home (Full Time workers)



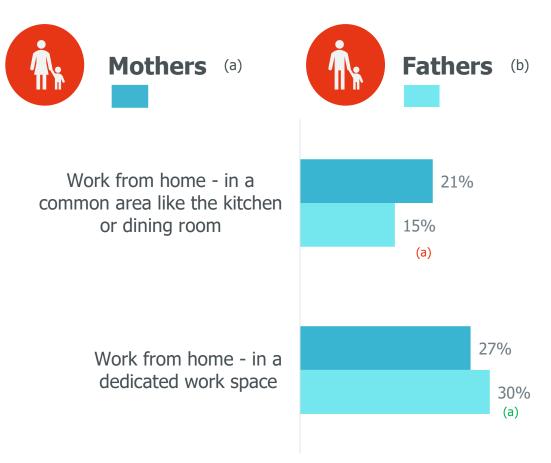
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For those who WFH, Mothers tend to have to 'make-do' in a common area



Whilst Fathers are more likely to have a dedicated work-space

WFH Location (Full Time workers)





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There has been an impact on career progression across the board



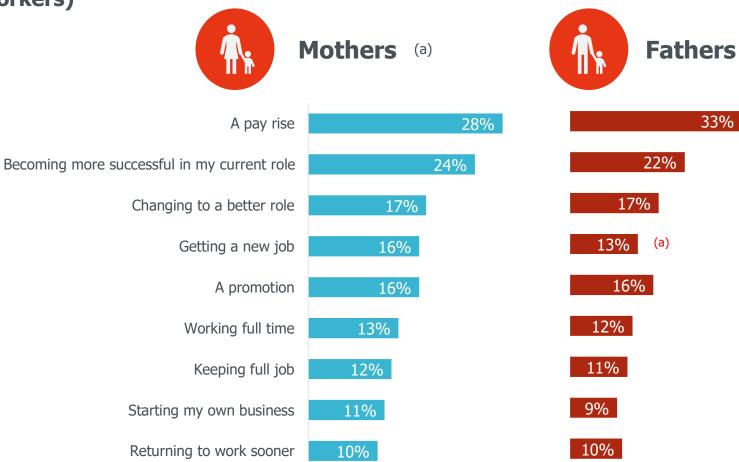
(a)

For Fathers the loss has been financial, whilst Mothers feel more limited in findings new roles

Progression Impact (Full Time workers)



Missing out on a pay rise was specifically seen in Germany, Italy and the UK



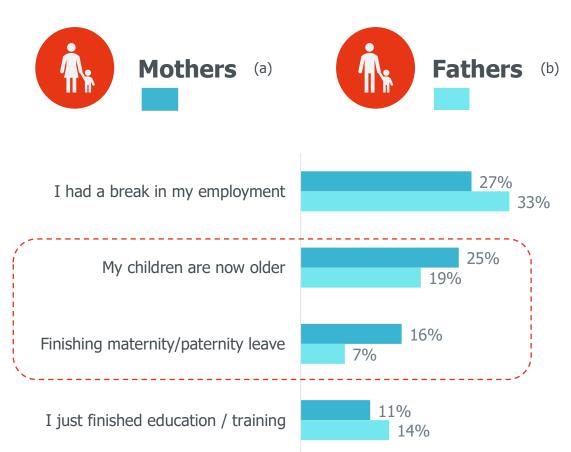
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Childcare responsibilities were also a key deterrent of retuning to work



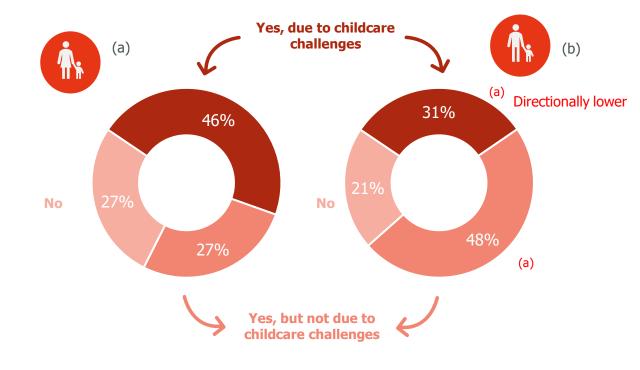
And for almost half the mothers we spoke to, childcare challenges resulted in a delayed return to the workplace

Return to work reasons



Return to work childcare impact

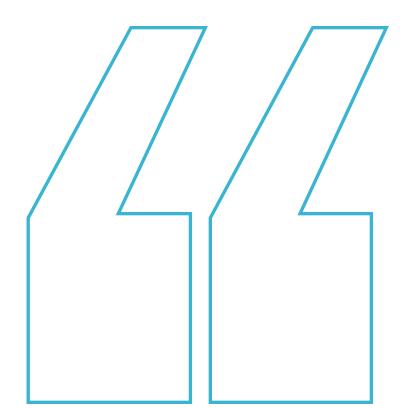
Has balancing looking after/doing things for your children with the pandemic stopped you from returning to or starting work sooner?





THE ROLE OF THE EMPLOYER









With *3 in 4 mothers* wishing they had *more support through the Pandemic,* employers play an important role in future to offer both *emotional* and *functional* support mechanics to all parents

[Employers need to be] ... more approachable and open to flexible working

(Mother, UK)

[We need employers] to allow us to create our own work schedules in terms of working at home within the work time and not discussing work after hours

(Mother, SA)

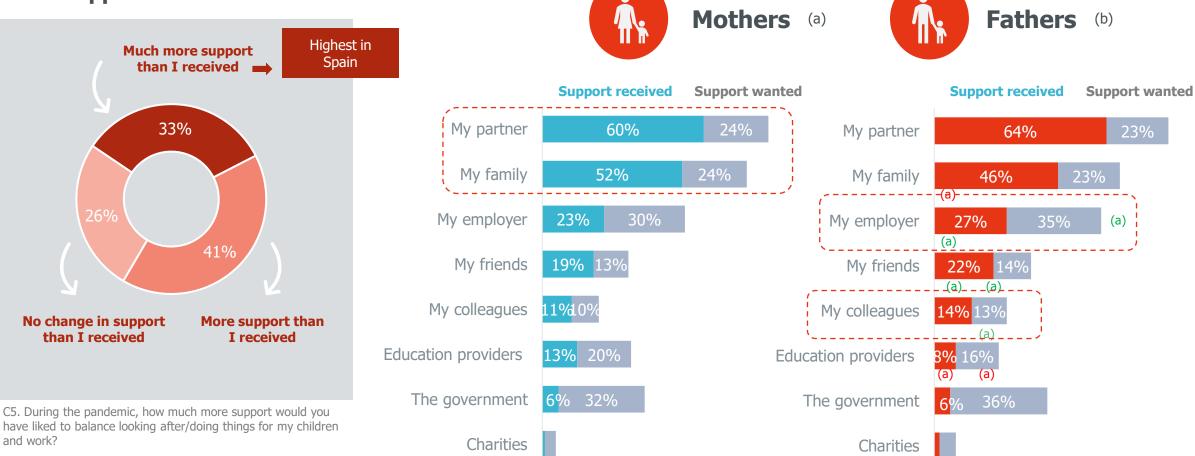


In general, more support was needed to balance work and childcare



But parents looked to different sources – Mothers prioritize partner & friends, but the employer plays an important role too – even more so for Fathers





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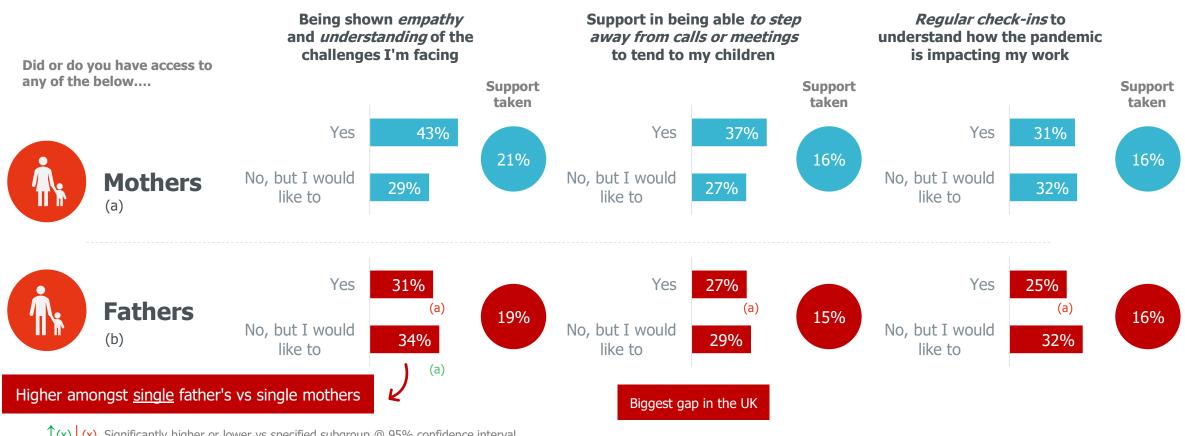
C3. Did you receive support from any of the below to help you balance looking after/doing things for your children and work? C4. Would you have liked more support from any of the below to help you balance looking after/doing things for your children and work? Base: Global Mothers = 1713 Fathers = 929 Internal

Mothers are regularly offered softer support and mental health mechanics



Opportunity for these to extend to Fathers, many of whom would like the same access

Support Mechanics - Emotional



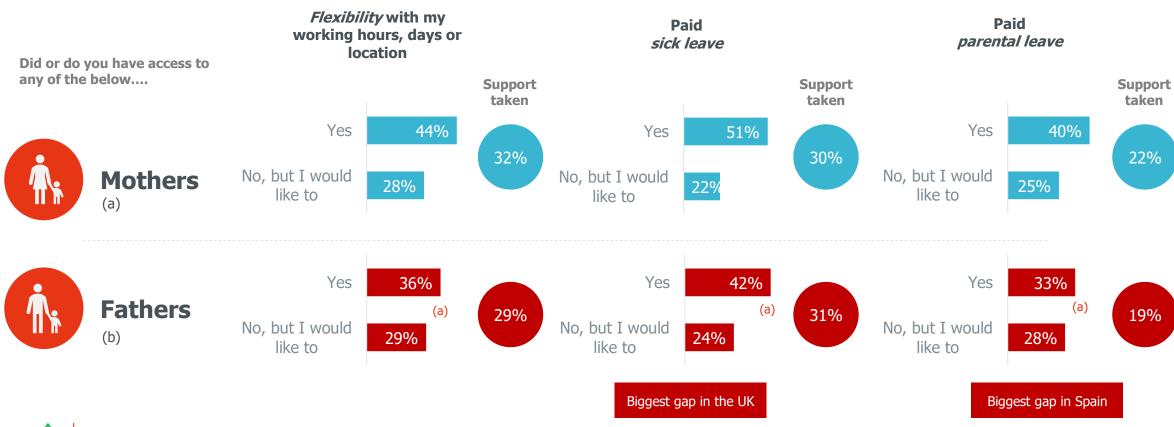
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Similarly, access to flexible working policies sits more on the side of Mothers



In general, uptake of support offer is low – likely due to financial or workplace restrictions

Support Mechanics - Functional



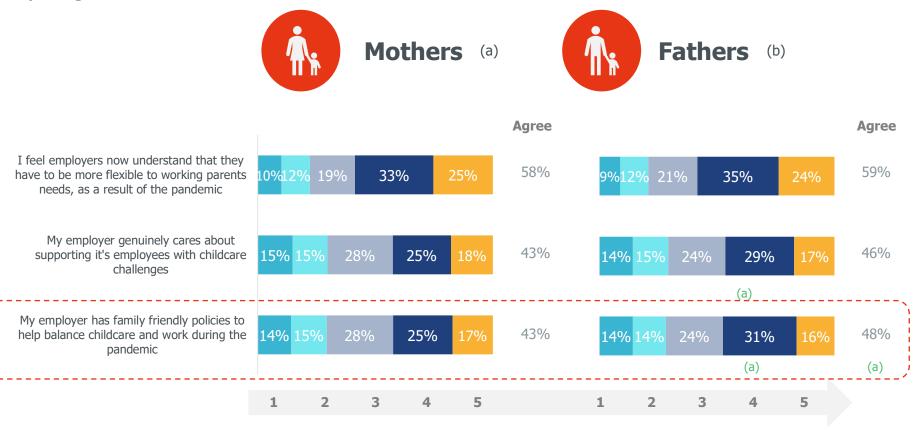
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In general, there has been improved employer understanding

But support and direct family friendly policies could have wider reach

Support Perceptions

5-point agreement scale



"To allow us to create our own work schedules in terms of working at home within the work time and not discussing work after hours" (Mother, SA)

Q. What would you like employers to be doing more of (if anything), to help you balance work and looking after/doing things for your children?

"More approachable and open to flexible working " (Mother, UK)

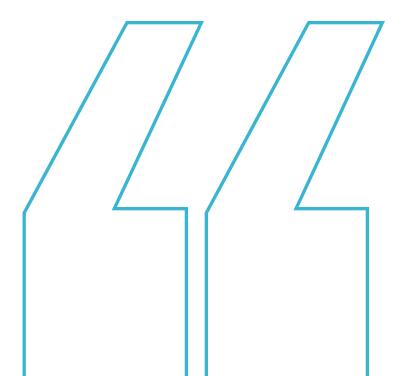
Q. What would you like employers to be doing more of (if anything), to help you balance work and looking after/doing things for your children?

 $[\]uparrow$ (x) \downarrow (x) Significantly higher or lower vs specified subgroup @ 95% confidence interval



THE POST COVID PLAN









Mothers remain resilient – 3 in 4 are confident that they'll be able to maintain a work life balance in future and the majority have a sense of positivity and ambition in themselves and their future careers

If the pandemic ends it would probably be a very positive thing for the balance between work and childcare

(Mother, IT)

I'm looking forward to **maintaining the same balance** that I had prior to 2020 and hoping to gather the same focus and hope that I had

(Father, SA)



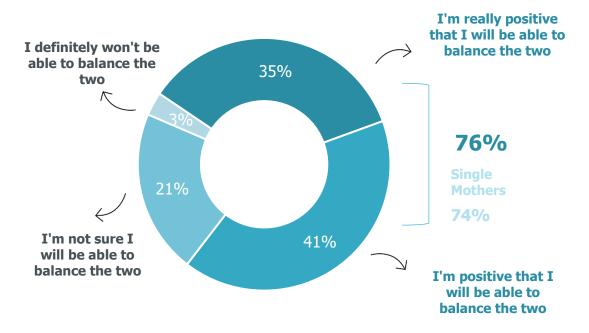
Parents overall remain positive about their ability to maintain a balance



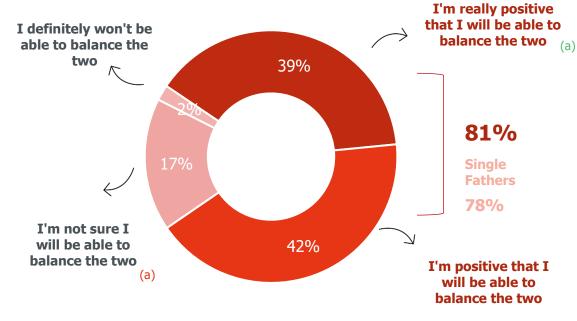
The majority feel like balance of work and home responsibilities are possible

Work - Home Balance









There is acceptance that flexible working habits play an essential role



Parents will alter working habits to ensure that this can become a reality

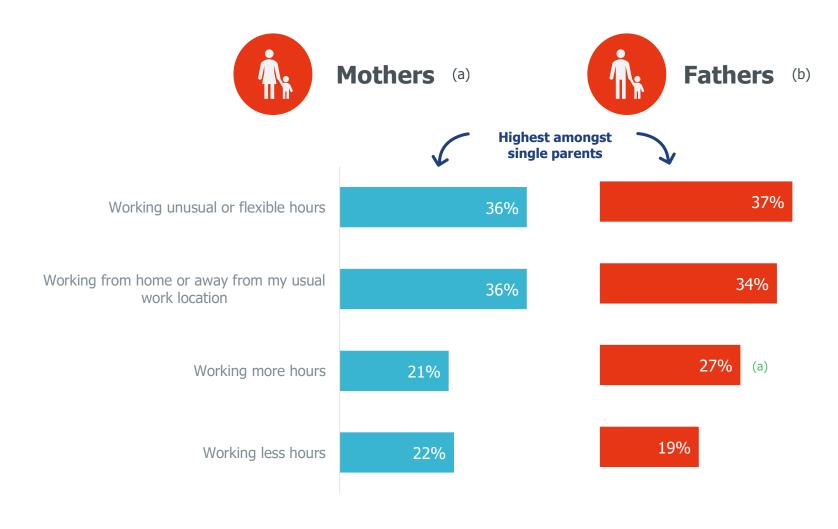
Future Work Patterns

"Application of **flexible working hours**, being able to commute between home and work during the day when necessary" (Father, TK)

"Allow for **flexibility between balancing the two** and have these in their policies and implemented. Offer paid parental leave." (Mother, SA)

"That they let us choose the days that interest us to work in the office or at home" (Mother, SP)

Q. What would you like employers to be doing more of (if anything), to help you balance work and looking after/doing things for your children??

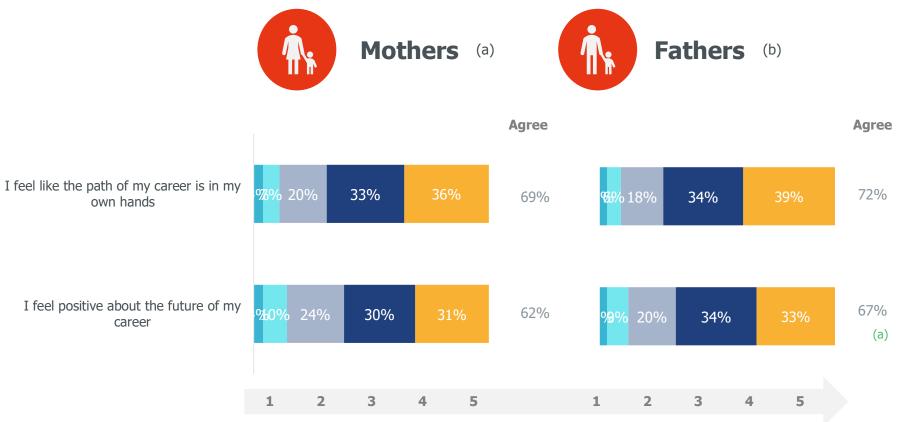


Ultimately, ambitions remain with most feeling positive

Career ownership and progression feels positive, despite the challenges of the last 24 months

Work Ambitions

5-point agreement scale



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"I was very worried for the 3 years because I had a very difficult time. **But right now, I am relaxed**" (Father, TK)

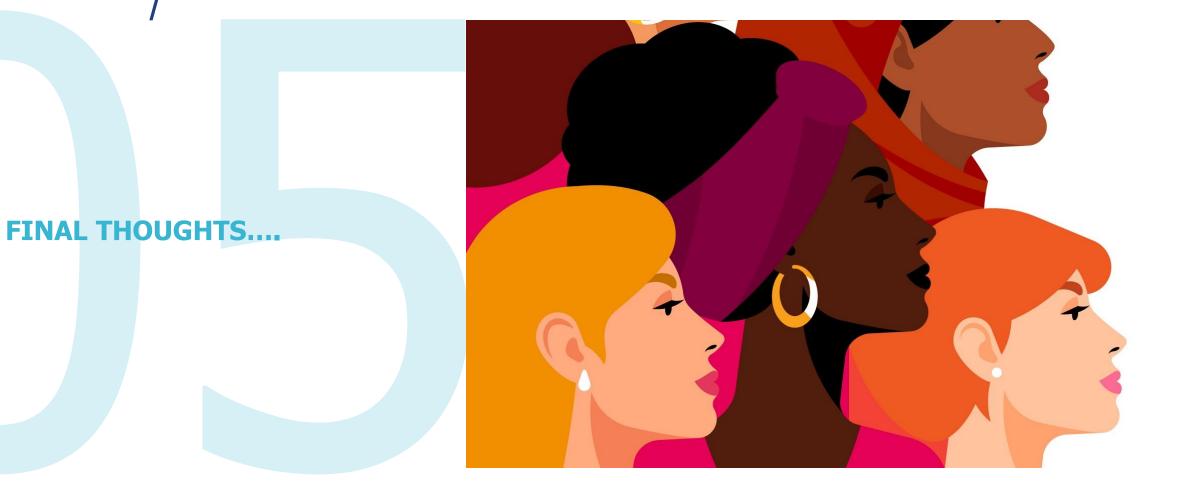
"I am happy to be with my family and I am truly honored to be able to offer them a better future and life." (Father, TK)

"If the pandemic ends it would probably be a very positive aspect for the balance between work and childcare." (Mother, IT)

"I'm looking forward to maintaining the same balance that I had prior to 2020 and hoping to gather the same focus and hope that I had" (Father, SA)

Q. Tell us how balancing looking after/doing things for your children and other elements of your life during the pandemic, made you feel?





Global Headlines

- Mothers are almost twice as likely to agree that they take the lion's share of childcare pressures and 1 in 4 spent less time on paid work as a result.
- Almost 1 in 2 Mothers felt their work performance was negatively impacted due to increased childcare pressures and 3 in 4 feel that it is crucial to plan ahead to achieve a balance in their week.
- With 3 in 4 mothers wishing they had more support through the Pandemic, employers play an important role in future to offer both emotional and functional support mechanics to all parents
- Mothers remain resilient 3 in 4 are confident that they'll be able to maintain a
 work life balance in future and the majority have a sense of positivity and
 ambition in themselves and their future careers

I loved being with my child more

- being a mum of a young boy and helping him learn more! Balancing work at home with a small child has been a challenge but I loved it (Mother, UK) I was able to take care of my son, but I had to **give up work** (Mother, IT)

If the pandemic ends it would probably be a **very positive thing for the balance** between work and childcare (Mother, IT)

[We need employers] to allow us to **create our own work schedules** in terms of working at home within the work time and not discussing work after hours (Mother, SA)



Extra duties has resulted in added stress and pressure amongst carers, especially mothers, with less positivity about the future

Carers - Top 2 Box (Strongly agree or agree)

	Ca	rer	Carer			
	Yes	No	Mother	Father		
I don't know what I would have done without the support of friends and family	59%↑	45%	58%	60%		
I have felt stressed or overwhelmed as a direct result of the pandemic	75%↑	71%	78%↑	72%		
I have felt a lot of pressure with balancing all aspects of my life	75%↑	69%	76%	72%		
I feel like the path of my career is in my own hands	71%	70%	70%	74%		
I want to start my own business venture	55%↑	43%	52%	60%↑		
I feel positive about the future	66%↑	61%	64%	70%↑		



GLOBAL DIFFERENCES

• Fathers and mothers felt equal levels of stress and pressure in UK, Turkey and Germany

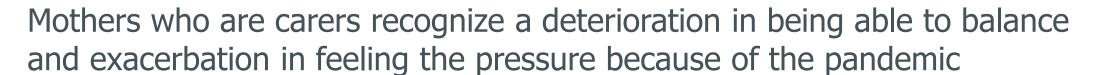
 Italy and Germany strongly showing a clear divide between mothers and fathers and their attitudes towards the future/business ventures

 \uparrow (x) \downarrow (x) Significantly higher or lower vs **other group** @ 95% confidence interval

A sense of

comes through

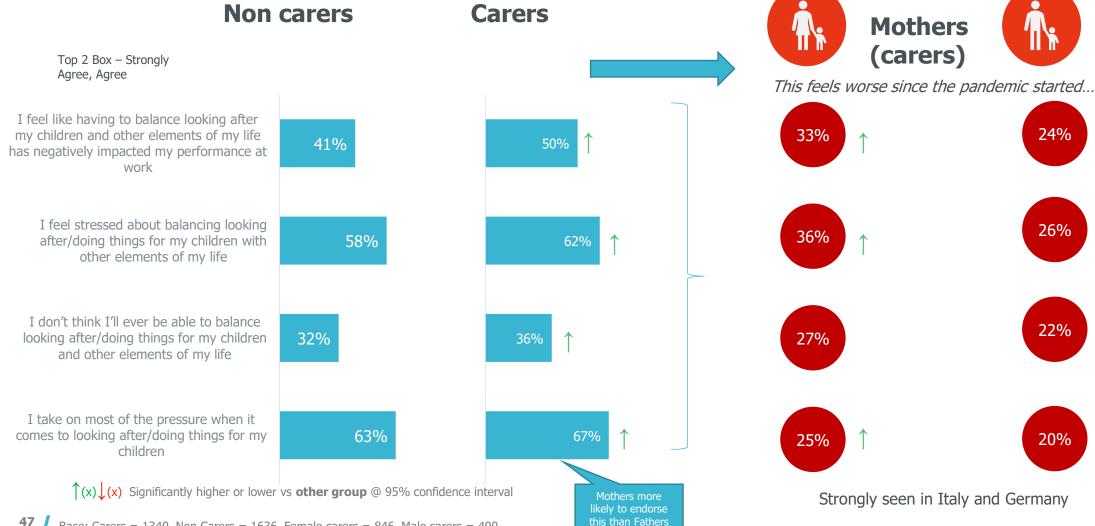






Fathers

(carers)



Employees need practical solutions offering flexibility (without sacrifice), as well as a culture which showcases empathy and understanding



What would you like employers to be doing more of (if anything), to help you balance work and looking after/doing things for your children?

Flexibility without sacrifice

"Employers allow flexibility, but deduct it from our salaries, so we are often on unpaid leave. They need to be more understanding about this." Mother, Turkey

"Present ideas with supporting educating children at home" Mother, Turkey

"That they realize that the working from home has been equal to or better than face-to-face work and that they do not force me to go to the company three days a week" Mother, Spain

"Flexibility in my working hours so that I can spend time with my children. For example, arranging the work time in the morning before my children go to school." Father, Turkey

"I would like my employer to offer more flexible times especially in the morning. I would also want to be reinstated back to full time work as they cut my hours and salary in half as a result of the pandemic. This resulting in having to cut down on expenses, i had to let my nanny go. This has become a huge strain as i'm failing to manage my workload and taking care of the children as well as doing chores." Mother, South Africa

"Working from home instead of needing to take sick days" Mother, Germany "Family friendly working hours"
Mother, Germany

"Allow different start and finish times for staff with younger children" Father, UK "Just to be more compassionate when it comes to some struggles we may face" Mother, UK

Empathy and Understanding

"Be more **empathetic and understand the various points of view** of workers" Mother, Italy

"I know that I have to be flexible in my work, but I also want my employer to understand that I have a small child at home and that they will accommodate me." Mother, Germany

"**Ask employees** what needs they have" Father, Spain

"it would be enough to recognize the difficulties. showing empathy and resilience" Mother, Italy

"Just general checking in to see if **employees are okay**" Father, UK

Companies like Facebook, Microsoft and Patagonia are working on embedding family friendly policies into their culture



Source: https://www.fastcompany.com/90540415/these-companies-are-helping-working-parents-navigate-an-impossible-situation



To put less pressure on employees, Facebook suspended their performance review process and promotion cycles



Despite being too big of a company to qualify for the Families First Coronavirus Response act, which offered 12 weeks of paid leave to parents, Microsoft matched that with their internal policy.



Patagonia extensively surveyed parents to find out what care they have and need. They encouraged a shift to more asynchronous work e.g. long term projects, to ease pressure. They also provided on-site childcare and an after-school programme



Cleo, a family benefits platform, launched the Invest in Parents pledge, which companies like Uber and Salesforce bought into. One of the first things they did was bring all the companies together so they could discuss and compare policies.

Cleo also teamed up with UrbanSitter which connects parents with vetted childcare providers, workshops and coaching for children up to 12.

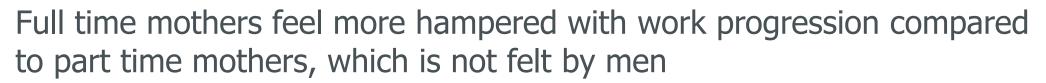


Facebook, Google, Apple and Microsoft partnered with Bright Horizons, which helps employers provide a range of services, including on site care and backup care, which involved having their child attend a daycare centre or caregivers could be sent to the house. Although full time working mothers feel positive about the future, there is an undeniable element of stress alongside it, not felt by fathers



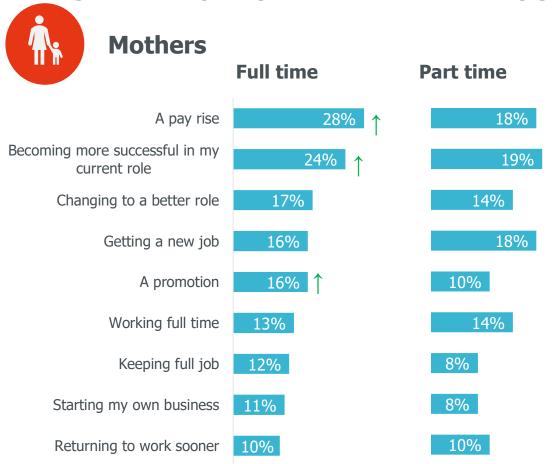
Top 2 Box – Strongly Agree, Agree	Full Time vs Pa	rt Time Mothers	Full Time vs Part Time Fathers			
	Full Time	Part Time	Full Time	Part Time		
I feel stressed about balancing looking after/doing things for my children with other elements of my life	65%↑	58%	56%	54%		
I take on the most pressure when it comes to looking after/doing things for my children	68%	69%	59%	55%		
I feel like the path of my career is in my own hands	73%↑	64%	72%	72%		
I want to start my own business venture	50%↑	39%	50%	65%↑		
I feel positive about the future	68%↑	52%	67%	69%		

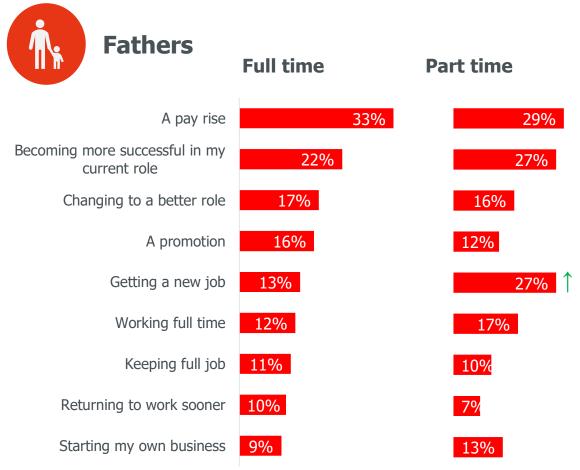
 \uparrow (x) \downarrow (x) Significantly higher or lower vs **other group** @ 95% confidence interval





Progression Impact (Full time vs Part Time by gender)





 \uparrow (x) \downarrow (x) Significantly higher or lower vs **other group** @ 95% confidence interval



THANKYOU

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