Background

• KinderCare partnered with Harris Poll to identify factors impacting parent confidence today

• We surveyed more than 2,000 U.S. parents with children under age 12

• Five years in, the survey continues to shine new light on how parents are feeling today and on the importance role access to high-quality child care plays in parent confidence
Key Takeaways

Parent confidence
• Five years in, parent confidence remains high

Child care is a must-have benefit, especially with the return to office
• Child care benefits are among the top reasons parents stay at their job, and are increasingly important when employers mandate a return to the office
• Gen Z says child care is their top desired benefit

Consistent, high-quality child care improves parents’ mental health
• Parents are anxious about rising child care costs, and those without consistent access find it increasingly hard to secure child care in their communities

Parents see impact of high-quality child care programs on children
• Children show improvement in a variety of areas, including social emotional skills and language and literacy
Parents’ confidence remains high

How would you rate your level of confidence when it comes to parenting on a typical day?

- **Very Confident**: 42% (2023) / 43% (2024)
- **Somewhat Confident**: 41% (2023) / 38% (2024)
- **Neither Confident nor Unconfident**: 7% (2023) / 11% (2024)
- **Somewhat Unconfident**: 5% (2023) / 5% (2024)
- **Very Unconfident**: 5% (2023) / 3% (2024)

81% Confident
Parents who use child care are especially confident

73%

Of parents who use child care feel highly confident in themselves on a typical day

For working parents, being employed full-time gives a significant boost to self-confidence (79% Full-Time vs. 64% Part-Time)
Safety remains the top factor in choosing child care

- Safety measures: 50% in 2023, 54% in 2024
- Reliability/consistency: 49% in 2023, 52% in 2024
- Health protocols: 38% in 2023, 39% in 2024
- Emotional curriculum: 37% in 2023, 39% in 2024
- STEM curriculum: 35% in 2023, 30% in 2024
- Inclusion practice: 30% in 2023, 27% in 2024
However, finding child care remains a challenge

- 23% don’t have an emergency or back-up option if their primary form of child care isn’t available
- 48% say finding child care feels impossible right now
- 60% believe it’s becoming increasingly hard to secure high-quality child care in their community
Parent Confidence & The Future of Work
Parents prefer remote or hybrid work, despite RTO push

Which of the following best describes your current and ideal work environment?

- **All remote**: Current 29%, Ideal 39%
- **Hybrid**: Current 31%, Ideal 35%
- **Fully in-office**: Current 39%, Ideal 24%
With RTO, parents expect child care support

- 62% Feel that when employers force parents to return to office (full time or most of the time), it shows they don't get what parents' lives are really like
- 53% Expect their company to offset the burden of child care costs as they return to the office
- 54% Feel that in-office work has or will change their child care needs
Parents want flexibility and child care options as they return to work

<table>
<thead>
<tr>
<th>Child Care Benefit</th>
<th>Percentage of Parents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flexible start and end times</td>
<td>61%</td>
</tr>
<tr>
<td>Subsidized child care</td>
<td>49%</td>
</tr>
<tr>
<td>On-demand child care</td>
<td>42%</td>
</tr>
<tr>
<td>Emergency/back-up child care provided by employer</td>
<td>42%</td>
</tr>
<tr>
<td>Mixed child care offering (on-site, subsidized, and/or on-demand)</td>
<td>40%</td>
</tr>
<tr>
<td>On-site child care</td>
<td>36%</td>
</tr>
</tbody>
</table>
There is a gap between child care benefits working parents receive and what they want.

| Child care benefits desired | +5% from 2023 | +7% from 2023 | +5% from 2023 | +9% from 2023 | +5% from 2023 | +8% from 2023

| Education funding for college tuition | 70% | 64% | 63% | 65% | 63% | 64% | 63% | 61% | 58%

| Tax credits (pre-taxed income for child care) | 32% | 16% | 30% | 17% | 28% | 10% | 28% | 8% | 6%

| Emergency/back up child care provided by employer | 26% | 18% | 24% | 13% | 24% | 7% | 20% | 11% | 17% | 10%

| Subsidized child care | +4% from 2023 | +7% from 2023 | +5% from 2023 | +9% from 2023 | +5% from 2023 | +8% from 2023

| "Off hours" where parents are unplugged | +4% from 2023 | +5% from 2023 | +9% from 2023 | +5% from 2023 | +8% from 2023

| On-demand child care | +5% from 2023

| Mixed child care offerings | +7% from 2023

| On-site child care | +8% from 2023

| Coworking spaces that double as daycares | +8% from 2023

**Child care benefits offered today**

Employed full-time | Employed part-time | Parents that would stay at their job for this benefit
Child care benefits are retention benefits

Percentage of parents who ranked benefits the most important in staying at current job

- Health insurance: 37%
- Paid time off (PTO): 22%
- Child care benefits: 18%
- Retirement benefits: 13%
- Vision insurance: 4%
- Short-term/long-term disability: 4%
- Dental insurance: 2%

52% ranked child care benefits in their top three, and 73% in their top five
Parents believe employers should offset child care costs

64% believe employers should offset the cost of childcare for their employees

49% would rather their employer subsidize their child care costs than get a raise

44% believe that current employer-provided child care benefits (e.g., HSAs, vouchers) are more difficult to use than health benefits
Parents would take a pay cut for child care benefits

57% would take a pay cut to work for a company that provided child care benefits.
Child care is also key to attracting new talent

- 74% say how a company supports its employees who are parents reflects how it cares for its employee overall.
- 51% believe that when they interview for a job, they consider it a red flag if employers don’t talk about how they support parents.
- 43% say they won’t even consider a job offer if child care support isn’t discussed (+6% from 2023).
Child care helps parents excel in their careers

72% say that if they knew they would always have quality child care coverage, they would be able to focus better on their work

+7% from 2023

78% say being confident in child care allows them to excel at work
Parents continue to adapt their careers to be more available for their children

Have you ever or would you consider doing any of the following to be more available for your child?

<table>
<thead>
<tr>
<th>Action</th>
<th>Have Done</th>
<th>Would Consider</th>
<th>Net</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switch jobs</td>
<td>74%</td>
<td>42%</td>
<td>70%</td>
</tr>
<tr>
<td>Take on a less demanding job/role</td>
<td>73%</td>
<td>43%</td>
<td>65%</td>
</tr>
<tr>
<td>Scale back hours at work</td>
<td>70%</td>
<td>36%</td>
<td>39%</td>
</tr>
<tr>
<td>Move to a new city/location</td>
<td>70%</td>
<td>33%</td>
<td>24%</td>
</tr>
<tr>
<td>Pursue a freelance job</td>
<td>65%</td>
<td>24%</td>
<td>39%</td>
</tr>
<tr>
<td>Take a job that pays less with more flexibility</td>
<td>62%</td>
<td>27%</td>
<td>36%</td>
</tr>
<tr>
<td>Spouse scale back hours at work</td>
<td>62%</td>
<td>39%</td>
<td>30%</td>
</tr>
<tr>
<td>Take a career break</td>
<td>62%</td>
<td>28%</td>
<td>36%</td>
</tr>
<tr>
<td>Stay at a job I'm unsatisfied with</td>
<td>59%</td>
<td>25%</td>
<td>36%</td>
</tr>
<tr>
<td>Defer a promotion</td>
<td>55%</td>
<td>35%</td>
<td>36%</td>
</tr>
</tbody>
</table>

Net: Percentage of parents who have done, would consider, or consider doing the action.

Have Done: Percentage of parents who have done the action.

Would Consider: Percentage of parents who would consider doing the action.

Net: Percentage of parents who have done or would consider doing the action.
Parents’ Confidence in Children’s Development
Parents notice impact of high-quality child care

What differences have you noticed in your child(ren) since they enrolled in care?

- Social-emotional skills: 58%
- Language & literacy skills: 56%
- Creative expression skills: 53%
- Cognitive skills: 50%
- Executive function skills: 46%
- Physical & motor skills: 41%
Parents value kindness and cross-cultural understanding

- 84% believe it’s important that children learn to treat others the way they want to be treated
- 83% believe kindness should be a core value in the way we educate children
- 81% believe it’s important that their children learn and play with children from different backgrounds than theirs
Parents’ Confidence & Parent Mental Health
Lack of child care a significant source of stress for parents

- 71% believe being a parent means constantly thinking about child care gaps.
- 65% believe that if they had consistent access to high-quality child care coverage, they would be able to be more present as a parent with their children.
- 55% said that piecing together enough child care coverage is a significant source of stress.
Parents need a break

- 62% Feel that the burden on parents with young children doesn’t get as much attention as it deserves
- 51% Feel burnt out by constantly assessing what’s best for their children
- 41% Feel like they never get a break from parenting
Consistent, high-quality child care #1 improver of parent’s mental health

Percentage of parents who said the following would improve their mental health

- Consistent, high-quality child care: 88%
- On-demand care options: 85%
- Best-in-class developmental programs: 84%
- Child care environments backed by personalized data: 82%
- Subsidized child care options: 80%
Parents’ Expectations of Government
Parents want the government to offset child care costs

I'd like to see structural child care addressed during the 2024 presidential election: 68%
I want a guarantee that child care will be available to those who need it: 73%
I believe child care in this nation is at a crisis point for parents in terms of accessibility and affordability: 68%
There cannot be a fully functional economy without structural child care: 67%
I believe government should offset the cost of child care in America: 68%
I believe the government should offer universal child care to all children, from birth to kindergarten: 68%
To increase long-term economic growth, child care should be subsidized by the government: 67%
Subsidized child care makes long-term financial sense: 68%
I believe child care should be a prominent election issue: 65%
Access to free child care would allow me to pursue employment or education goals I've been holding off on: 67%
I think the government should cap child care costs at 7% of parents' income: 60%
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Affordable, accessible child care is a top concern, regardless of political affiliation.

- **I want a guarantee that child care will be available to those who need it:**
  - Total: 73%
  - Democrat: 68%
  - Republican: 67%
  - Independent: 81%

- **I believe child care in this nation is at a crisis point for parents in terms of accessibility and affordability.**
  - Total: 68%
  - Democrat: 63%
  - Republican: 63%
  - Independent: 74%

- **There cannot be a fully functional economy without structural child care**
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  - Independent: 76%

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Methodology

This survey was conducted online within the United States by The Harris Poll on behalf of KinderCare from November 3, 2023, to November 15, 2023, among 2,004 parents with children age 12 and younger. Within the sample we surveyed 1,177 parents with children age 5 and under, and 827 with children age 6-12. The presentation represents national sample; we then looked at the data cut by the following demographics: age, race/ethnicity, gender, income, region, and employment status. This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated.

^ indicates a statistically significant difference among waves of the study
* indicates that the sample is < n =100
## Who did we talk to?

### Race/ethnicity
- Black (n=305)
- White (n=1,231)
- Hispanic (n=313)
- Asian (n=77)
- BIPOC (n=773)

### Age
- Young Children (under 5) (n=1,177)
- Older Children (over 5) (n=827)

### Gender
- Women (n=1,265)
- Men (n=730)
- Other/prefer not to say (n=11)

### Industry
- Education (n=157)
- Finance (n=119)
- Healthcare (n=223)
- Tech (n=145)
- Academia (n=13)
- Other industry (n=818)

### Generation
- Gen Z (n=440)
- Millennial (n=1033)
- Gen X (n=444)
- Boomer (n=87)

### Work status
- Working parents (n=1,475)
- Employed full time (n=1,239)
- Employed part time (n=236)

### Primary child care
- Daycare/preschool (n=630)
- Nanny (n=257)
- Stay at home (n=785)
- Work from home (n=480)
- Family/friends (n=623)
- After school programs (n=490)

### US region
- Northeast (n=355)
- Midwest (n=438)
- Mid-Atlantic (n=114)
- South (n=527)
- Central (n=246)
- West (including CA) (n=324)
- West (excluding CA) (n=141)
- California (n=183)

### Work environment
- Remote (n=630)
- Hybrid (n=426)
- Office (n=592)

### Political party
- Democrat (n=805)
- Republican (n=579)
- Independent / other (n=620)