Summary
Background

• KinderCare partnered with Harris Poll to identify the factors impacting parent confidence levels today
• We surveyed more than 2,000 U.S. parents with children age 12 and younger
• Now in its third year, the survey unveils the shifts that have happened
Key Takeaways

• Parent confidence is at an all-time high, despite all-time high stress levels

• Parents are rethinking work to be more available to their children
  • Child care benefits top-of-mind when making career shifts
  • Employers, however, are leaving a lot on the table

• Parents are also reimagining the future of education
  • Mental health and inclusion taking a front seat

• Most parents believe child care is at a crisis point in the U.S.
  • Across political lines, parents agree the government should step up
The State of Parents’ Confidence 2022
Parent confidence is on the rise

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

Parent Who are Very Confident or Somewhat Confident

Q2: How would you rate your level of confidence when it comes to parenting on a typical day (n=1021)
Basic needs are driving parent confidence

Which of the following, if any, gives you more confidence in your parenting?

- Knowing my child is in a safe and secure environment: 61% (2022), 66% (2019)
- Having enough time to spend with my child: 63% (2022), 65% (2019)
- Knowing my child is getting individual attention and care: 48% (2022), 58% (2019)
- Knowing my child’s whole self is being nurtured: 52% (2022), 57% (2019)

Q4: Which of the following, if any, give you more confidence in your parenting (whether it is provided by you as a parent, or provided by a caretaker)? (n=1021)
Concerns about safety and childcare closures undermine confidence

Top factors complicating ability to confidently navigate parenting right now

Q7: As we continue to navigate uncertain times, which of the following, if any, are complicating your ability to confidently navigate parenting right now? (n=1021)

- Uncertainty around safety of sending children to school and childcare facilities: 44%
- Uncertainty around school/child care closures: 36%
- Finding quality child care: 33%
- Finding affordable child care: 29%
- Finding available child care: 26%

0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%
Reliability, curriculum are key deciding factors when choosing child care

When it comes to deciding on a childcare provider, what are the most important factors?

Q22: When it comes to deciding on a childcare provider, what are the most important factors? (n=1021)
Parent Confidence & State of Work
Work flexibility allows parents to be more present in children’s lives

“\text{I am able to be more involved in my child's life because my modern work schedule is more flexible.}”

69%

+10% from Feb 2020
+4 from Nov 2020

Q19: How much do you agree or disagree with the following statements? (n=746)
Parents are reimagining the future of work

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

<table>
<thead>
<tr>
<th>Have Done</th>
<th>Would Consider</th>
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</thead>
<tbody>
<tr>
<td>Switch jobs</td>
<td>44% 37%</td>
</tr>
<tr>
<td>Scale back hours at work</td>
<td>35% 39%</td>
</tr>
<tr>
<td>Take on a less demanding job/role</td>
<td>27% 44%</td>
</tr>
<tr>
<td>Pursue a freelance job</td>
<td>28% 41%</td>
</tr>
<tr>
<td>Spouse scale back hours at work</td>
<td>31% 36%</td>
</tr>
<tr>
<td>Take a job that pays less with more flexibility</td>
<td>30% 34%</td>
</tr>
<tr>
<td>Move to a new city/location</td>
<td>24% 40%</td>
</tr>
<tr>
<td>Stay at a job I'm unsatisfied with</td>
<td>40% 23%</td>
</tr>
<tr>
<td>Take a career break</td>
<td>27% 34%</td>
</tr>
<tr>
<td>Defer a promotion</td>
<td>23% 37%</td>
</tr>
</tbody>
</table>

Parents on both sides are making changes, yet in different ways:

- 37% of working moms have scaled back their hours at work, compared to 33% of working dads.
- Alternatively, over a quarter (28%) of working dads have deferred a promotion, compared to 18% of working moms.

Q10: Have you ever or would you consider doing any of the following to be more available for your child? (n=746)
Over half of working parents say they would take a pay cut for child care

Q9: When it comes to deciding on a childcare provider, what are the most important factors? (n=1021)
Q19: How much do you agree or disagree with the following statements? (n=746)

39% are open to or actively seeking new jobs

55% say “I would take a pay cut to work for a company that provided quality childcare.”
Companies have catching up to do when it comes to childcare benefits

Q11: When considering staying at your current job, how important are your company’s childcare benefits in your consideration process? (n=746)

Q19: How much do you agree or disagree with the following statements? (n=746)

- **81%** “A company’s childcare benefits are important to the job consideration process”
- **73%** “It is rare to find a company that offers childcare services that go above and beyond the basics”
- **65%** “There is a disconnect between employers and childcare support”

75% Tech*
77% Finance*
Companies are leaving a lot on the table when it comes to desirable benefits

Top childcare policies / benefits offered by current employer

Q12: Which childcare policies or benefits does your current employer offer? (n=746)

Q13: When thinking about childcare and your job, which of the following benefits would convince you to stay or leave if provided by your current employer or potential employer? (n=746)
Parents want their employers to offset the cost of their childcare

68%
“\textit{I believe employers should offset the cost of childcare for their employees}”
(Top 2 Box)
+3% from Nov 2020

81%
“\textit{Being confident in my childcare allows me to excel at work}”

84% who are employed full time
84% who use daycare/preschool

Q19: How much do you agree or disagree with the following statements? (n=746)
Hybrid work is here to stay, impacting childcare needs

“"I feel that hybrid work has or will change my childcare needs" (Top 2 Box)
75% Healthcare*
77% Finance*"

<table>
<thead>
<tr>
<th>Needs that have resulted from hybrid work (%) Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family members / friends who can help</td>
</tr>
<tr>
<td>Co-working and play centers</td>
</tr>
<tr>
<td>Multiple locations for child care</td>
</tr>
<tr>
<td>On-demand care options</td>
</tr>
<tr>
<td>Babysitters / part-time caretakers / nannies</td>
</tr>
<tr>
<td>Local community centers or afterschool care</td>
</tr>
</tbody>
</table>

S4: Which of the following best describe your current, expected, and ideal work environments? (n=746)
Q14: Do you feel that hybrid work has/will change your childcare needs? (n=512);
Q18: In what ways has/will it changed or will change your childcare needs? Now I need…(n=355)
The pandemic has redefined the role of stay-at-home parents

Q23: Did the pandemic lead you to becoming a stay-at-home parent? (n=400)
Q24: When it comes to childcare, in which ways would you like more support? (n=400)
Stay-at-home parents need support too, including child care

When it comes to deciding on a child care provider, what are the most important factors?

Q25: How much do you agree or disagree with the following statements? (n=400)
Q24: When it comes to childcare, in which ways would you like more support? (n=400)

- "Taking care of my child(ren) is not my only responsibility as a stay-at-home parent.” 79%
- "It is a misconception that stay-at-home parents don't need child care.” 65%

When it comes to child care, in which ways would you like more support? (% Selected)

- More work flexibility for my partner/co-parent 42%
- Drop-off spaces 33%
- Part-time care (e.g., daycare one day a week) 31%
- On-demand child care options 30%
- In-home help (e.g., babysitter) 25%
Parent Confidence & Future of Education
Parents are reimagining education with a renewed focus on mental health

87% "It's important to me that my child(ren) is raised with social emotional skills"

80% "Just like physical health, mental health needs to be a part of the school curriculum"

80% "I have made an effort to teach my child(ren) about mental health coping skills and strategies"

86% of parents with kids in Daycare/Preschool
Parents want kindness and inclusion included in curriculum

How much do you agree or disagree with the following statements?

85% “It's important educational curriculum helps children better understand and respect all people”

83% “In educational environments, all types of families should be celebrated”

81% “It’s important to me that my child(ren) sees themselves reflected in the classroom (e.g., in books, activities, cultural celebrations, etc.).”

Q21: How much do you agree or disagree with the following statements? (n=1021)
Health, safety and reliability remain top priority for child care needs

“My child(ren)’s health and safety is my top priority”
(Top 2 Box)

agree that a safe and secure environment is the #1 factor that boosts their parenting confidence
(Top 2 Box)

93% 66%

Most important child care needs for parents today:
1. Reliability/consistency (56%)
2. Best-in-class academics (38%)
3. Best-in-class health protocols (35%)

Q4: Which of the following, if any, give you more confidence in your parenting (whether it is provided by you as a parent, or provided by a caretaker)? (n=1021)

Q6: Please indicate how much you agree or disagree with the following statements (n=1021)

Q7: As we continue to navigate uncertain times, which of the following, if any, are complicating your ability to confidently navigate parenting right now? (n=1021)
Parent Confidence & Pandemic Impact
Parents are in desperate need of empathy and understanding

The pandemic continues to burden parents, especially those with young kids

- 59% “Parenting during Covid-19 has been the most stressful time of my life” (Top 2 Box) - +4% from November 2020
- 55% “It feels like I never get a break from parenting anymore” (Top 2 Box)
- 60% “The burden placed on parents today with young kids doesn’t get as much attention as it deserves” (Top 2 Box)

Q6: Please indicate how much you agree or disagree with the following statements (n=1021)
Parents’ top concerns are kids’ wellbeing, family finances

Worries keeping parents up at night

<table>
<thead>
<tr>
<th>Concern</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>My child(ren)’s overall health and wellbeing</td>
<td>47%</td>
</tr>
<tr>
<td>Concerns over personal finances (e.g., debt, money etc.)</td>
<td>46%</td>
</tr>
<tr>
<td>Too much screentime (e.g., staying up on my phone all night)</td>
<td>32%</td>
</tr>
<tr>
<td>Affordability of child care and education (e.g., how do we pay for this?)</td>
<td>25%</td>
</tr>
<tr>
<td>Pressure from my job (e.g., working late)</td>
<td>24%</td>
</tr>
<tr>
<td>Too much caffeine</td>
<td>22%</td>
</tr>
<tr>
<td>Logistics of child care and education</td>
<td>22%</td>
</tr>
</tbody>
</table>

Q16: Which of the following elements, if any, keep you up at night? (n=1021)
Parents want the government to step up and support them

How much do you agree or disagree with the following statements?

- I want a guarantee that child care will be available to those who need it: 75%
- I believe government should offset the cost of child care in America: 72% (+10% from Nov 2020)
- I believe child care in this nation is at a crisis point for parents in terms of accessibility and affordability: 71%
- To increase long-term economic growth, child care should be subsidized by the government: 69%
- Subsidized child care makes long-term financial sense: 69%
- I believe the government should offer universal child care to all children, from birth to kindergarten: 68%
- There cannot be a fully functional economy without structural child care: 68%
- I believe child care should be a prominent election issue: 67%
- I think the government should cap child care costs at 7% of parents' income: 61%
- I would move to a different state if it meant I could access free child care: 47%

Q27: How much do you agree or disagree with the following statements? (n=1021)
Q28: How much do you agree or disagree with the following statements? (n=1021)
Parents across political lines believe child care is at a crisis point

How much do you agree or disagree with the following statements?

Q27: How much do you agree or disagree with the following statements? (n=1021)
Q28: How much do you agree or disagree with the following statements? (n=1021)
Methodology
Methodology

- This survey was conducted online within the United States by The Harris Poll on behalf of KinderCare from January 14, 2022, to January 22, 2022, among 2,023 parents with children age 12 and younger.

- Within the sample we surveyed 992 parents with children age 5 and under, and 1,031 with children age 6-12. This presentation represents the national sample (n=1,021).

- 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 that the sample is < n =100
Who we talked to

DMA
• San Francisco (n=100)
• Los Angeles (n=100)
• Phoenix (n=101)
• Houston (n=100)
• Minneapolis (n=100)
• Boston (n=100)
• Chicago (n=100)
• New York (n=100)
• Philadelphia (n=101)
• DC (n=100)

Race/ethnicity
• Black (n=103)
• White (n=736)
• Hispanic (n=110)
• Asian (n=39)
• All other (n=33)
• BIPOC (n=285)

Age
• Young Children (under 5) (n=497)
• Older Children (over 5) (n=524)

Industry
• Education (n=68)
• Finance (n=48)
• Healthcare (n=89)
• Tech (n=69)
• Academia (n=7)
• Other (n=465)

Gender
• Women (n=599)
• Men (n=413)
• Prefer not to answer (n=9)

Sample
• National (n=1,021)
• DMA (n=1,002)

Work status
• Working parents (n=746)
• Stay at home parents (n=400)
• Work from home (n=223)
• Employed full time (n=624)
• Employed part time (n=122)