Background

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

• We surveyed more than 2,800 U.S. parents with children under 12

• Four years in, the survey continues to shine new light on how parents are feeling today
Key Takeaways

Parent confidence remains high
• They’re confident in their abilities as parents and in their child care providers
• Safety is now the single most important factor for parents deciding on a provider
• Data from providers around statistics and learning outcomes increases parent confidence

Child care remains a must-have employment benefit
• Child care benefits are the 2nd highest reason parents stay at their job, behind health insurance

Parents are optimistic about the future of education
• They want a focus on social emotional skills, mental health, kindness and understanding differences

Parents still believe child care access should be a government priority
• They believe the government should step up to offset costs, especially for those who need it most
The State of Parent Confidence 2023
Parents’ confidence overall remains high

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

- Very Confident: 42% (2023), 45% (2022)
- Somewhat Confident: 41% (2023), 40% (2022)
- Neither Confident nor Unconfident: 7% (2023), 6% (2022)
- Somewhat Unconfident: 5% (2023), 5% (2022)
- Very Unconfident: 5% (2023), 3% (2022)

83% Confident
-3 overall confidence 2022
+6 overall confidence 2020^ 
+6 overall confidence 2019^
Parents who use child care are especially confident

82%

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 (81% Full-Time vs. 64% Part-Time)
Safety is now the most important factor in choosing child care

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

<table>
<thead>
<tr>
<th>Best-in-class safety measures</th>
<th>Reliability/consistency</th>
<th>Best-in-class health protocols</th>
<th>Best-in-class emotional curriculum</th>
<th>Best-in-class functional curriculum</th>
<th>Best-in-class inclusion practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>+18% from 2022^</td>
<td>-7% from 2022^</td>
<td>+3% from 2022</td>
<td>+4% from 2022</td>
<td>-3% from 2022</td>
<td>-3% from 2022</td>
</tr>
<tr>
<td>50%</td>
<td>49%</td>
<td>38%</td>
<td>37%</td>
<td>35%</td>
<td>30%</td>
</tr>
<tr>
<td>32%</td>
<td>56%</td>
<td>35%</td>
<td>33%</td>
<td>38%</td>
<td>33%</td>
</tr>
</tbody>
</table>

+18% from 2022^, -7% from 2022^, +3% from 2022, +4% from 2022, -3% from 2022, -3% from 2022, +7% from 2019^
Parents Confidence & The Future of Work
Employers are making progress in supporting working parents, but there’s still work to be done. 61% believe there is a disconnect between employers and childcare support. -6% from 2020^
Child care benefits are second to health insurance in retaining employees

Percentage of parents who ranked benefits #1 most important in staying at current job

- Health insurance: 42%
- Child care benefits: 18%
- Paid time off (PTO): 17%
- Retirement benefits: 13%
- Vision insurance: 4%
- Short-term/long-term disability: 4%
- Dental insurance: 3%

46% ranked child care benefits in their top three, and 69% in their top five.
Over half of parents would stay in their current jobs if any of the following childcare benefits were offered to them.

Top childcare policies / benefits offered by current employer:

- Pre-tax benefits (Dependent Care FSA): 31% (employed full-time), 21% (employed part-time), 61% (parents that would stay at their job for this benefit)
- Education funding: 28% (employed full-time), 18% (employed part-time), 65% (parents that would stay at their job for this benefit)
- On-demand childcare: 25% (employed full-time), 15% (employed part-time), 59% (parents that would stay at their job for this benefit)
- "Off hours" where parents are unplugged: 25% (employed full-time), 18% (employed part-time), 54% (parents that would stay at their job for this benefit)
- Emergency/backup child care provided by employer: 24% (employed full-time), 10% (employed part-time), 56% (parents that would stay at their job for this benefit)
- Subsidized child care: 23% (employed full-time), 13% (employed part-time), 60% (parents that would stay at their job for this benefit)
- Mixed child care offerings: 21% (employed full-time), 14% (employed part-time), 55% (parents that would stay at their job for this benefit)
- On-site child care: 17% (employed full-time), 13% (employed part-time), 54% (parents that would stay at their job for this benefit)
- Coworking spaces that double as daycares: 15% (employed full-time), 12% (employed part-time), 50% (parents that would stay at their job for this benefit)
Working parents want employers to offset the cost of child care

67%

believe employers should offset the cost of childcare for their employees

+5% from 2020
Hybrid work is here to stay

- 37% Hybrid is my current work environment
- 39% Hybrid is my expected work environment 1 year from now
- 41% Hybrid is my ideal work environment

+5% from 2022
Hybrid work is changing child care needs

75% said they feel that hybrid work has or will change their childcare needs.

Needs that have resulted from hybrid work:

- Family members / friends who can help: 56% (+6% from 2022)
- On-demand care options: 42% (+6% from 2022)
- Co-working and play centers: 40%
- Multiple locations for child care: 36%
- Babysitters / part-time caretakers / nannies: 35%
- Local community centers / afterschool care: 34%
Parents are leveraging work flexibility to be present in children’s lives

- 68% are able to more involved in their child’s life because their modern work schedule is more flexible
  
  +9% from 2020

- 67% agree that having enough time to spend with their children boosts their parenting confidence

  +2% from 2022
  +4% from 2019
Parents would rework professional lives 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></th>
<th>Have Done</th>
<th>Would Consider</th>
<th>Net</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switch jobs</td>
<td>31%</td>
<td>43%</td>
<td>74%</td>
</tr>
<tr>
<td>Take on a less demanding job/role</td>
<td>28%</td>
<td>45%</td>
<td>73%</td>
</tr>
<tr>
<td>Scale back hours at work</td>
<td>31%</td>
<td>39%</td>
<td>70%</td>
</tr>
<tr>
<td>Move to a new city/location</td>
<td>25%</td>
<td>40%</td>
<td>65%</td>
</tr>
<tr>
<td>Pursue a freelance job</td>
<td>24%</td>
<td>40%</td>
<td>64%</td>
</tr>
<tr>
<td>Take a job that pays less with more flexibility</td>
<td>28%</td>
<td>34%</td>
<td>62%</td>
</tr>
<tr>
<td>Spouse scale back hours at work</td>
<td>26%</td>
<td>36%</td>
<td>62%</td>
</tr>
<tr>
<td>Take a career break</td>
<td>27%</td>
<td>35%</td>
<td>62%</td>
</tr>
<tr>
<td>Stay at a job I'm unsatisfied with</td>
<td>33%</td>
<td>26%</td>
<td>59%</td>
</tr>
<tr>
<td>Defer a promotion</td>
<td>20%</td>
<td>36%</td>
<td>55%</td>
</tr>
</tbody>
</table>

Would Consider:
- Switch jobs: +1% from 2022, +2% from 2022
- Take on a less demanding job/role: -4% from 2022
- Scale back hours at work: -5% from 2022
- Move to a new city/location: -5% from 2022
- Pursue a freelance job: -5% from 2022
- Take a job that pays less with more flexibility: -5% from 2022
- Spouse scale back hours at work: -5% from 2022
- Take a career break: -4% from 2022
- Stay at a job I'm unsatisfied with: -5% from 2022
- Defer a promotion: -5% from 2022

Net:
- Switch jobs: 74%
- Take on a less demanding job/role: 73%
- Scale back hours at work: 70%
- Move to a new city/location: 65%
- Pursue a freelance job: 64%
- Take a job that pays less with more flexibility: 62%
- Spouse scale back hours at work: 62%
- Take a career break: 62%
- Stay at a job I'm unsatisfied with: 59%
- Defer a promotion: 55%
Parents would make career changes to improve child care access

Have you ever or would you consider doing any of the following because it is too difficult or expensive to find child care?

- **Switch jobs**
- **Take on a less demanding job/role**
- **Scale back hours at work**
- **Pursue a freelance job**
- **Take a job that pays less with more flexibility**
- **Take a career break**
- **Spouse scale back hours at work**
- **Move to a new city/location**
- **Stay at a job I’m unsatisfied with**
- **Defer a promotion**

**Have Done**

- Switch jobs: 26%
- Take on a less demanding job/role: 24%
- Scale back hours at work: 26%
- Pursue a freelance job: 21%
- Take a job that pays less with more flexibility: 26%
- Take a career break: 24%
- Spouse scale back hours at work: 24%
- Move to a new city/location: 20%
- Stay at a job I’m unsatisfied with: 27%
- Defer a promotion: 20%

**Would Consider**

- Switch jobs: 43%
- Take on a less demanding job/role: 43%
- Scale back hours at work: 39%
- Pursue a freelance job: 41%
- Take a job that pays less with more flexibility: 36%
- Take a career break: 36%
- Spouse scale back hours at work: 36%
- Move to a new city/location: 39%
- Stay at a job I’m unsatisfied with: 32%
- Defer a promotion: 35%

**Net**

- Switch jobs: 69%
- Take on a less demanding job/role: 67%
- Scale back hours at work: 65%
- Pursue a freelance job: 62%
- Take a job that pays less with more flexibility: 62%
- Take a career break: 60%
- Spouse scale back hours at work: 60%
- Move to a new city/location: 59%
- Stay at a job I’m unsatisfied with: 59%
- Defer a promotion: 55%
Parents’ Confidence and the Future of Education
Parents are prioritizing their children’s mental health

- 83% believe it’s important that children are raised with social emotional skills
- 79% believe that just physical health, mental health needs to be a part of school curriculum
- 74% believe they have made an effort to teach their children about mental health coping skills and strategies
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 & The Cost, Mental Burden of Child Care
Child care is pervasive stressor for parents

- 64% believe being a parent means constantly thinking about child care gaps.
- 60% 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.
- 50% said that piecing together enough child care coverage is a significant source of stress.
Parents continue to expect the government to step up

- I want a guarantee that child care will be available to those who need it: 71% (−4% from 2022)
- I believe child care in this nation is at a crisis point for parents in terms of accessibility and affordability: 70%
- There cannot be a fully functional economy without structural child care: 67%
- I believe government should offset the cost of child care in America: 66% (−6% from 2022)
- I believe the government should offer universal child care to all children, from birth to kindergarten: 66%
- To increase long-term economic growth, child care should be subsidized by the government: 65%
- Subsidized child care makes long-term financial sense: 65%
- I believe child care should be a prominent election issue: 64%
- Access to free child care would allow me to pursue employment or education goals I’ve been holding off on: 63%
- I think the government should cap child care costs at 7% of parents’ income: 60%
Parents across the political spectrum remain united: Government should make child care more accessible and affordable

<table>
<thead>
<tr>
<th>Statement</th>
<th>Total</th>
<th>Democrat</th>
<th>Republican</th>
<th>Independent</th>
</tr>
</thead>
<tbody>
<tr>
<td>I want a guarantee that child care will be available to those who need it</td>
<td>71%</td>
<td>60%</td>
<td>66%</td>
<td>81%</td>
</tr>
<tr>
<td>I believe child care in this nation is at a crisis point for parents in terms of accessibility and affordability.</td>
<td>78%</td>
<td>70%</td>
<td>78%</td>
<td>78%</td>
</tr>
<tr>
<td>There cannot be a fully functional economy without structural child care</td>
<td>78%</td>
<td>67%</td>
<td>78%</td>
<td>78%</td>
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<tr>
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<td>58%</td>
<td>79%</td>
</tr>
</tbody>
</table>
Methodology

This survey was conducted online within the United States by The Harris Poll on behalf of KinderCare from November 11, 2022, to November 17, 2022, among 2,002 parents with children age 12 and younger. Within the sample we surveyed 1,053 parents with children age 5 and under, and 949 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?

<table>
<thead>
<tr>
<th>Race/ethnicity</th>
<th>Age</th>
<th>Gender</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Black (n=247)</td>
<td>• Young Children (under 5) (n=1,053)</td>
<td>• Women (n=1066)</td>
</tr>
<tr>
<td>• White (n=1130)</td>
<td>• Older Children (over 5) (n=949)</td>
<td>• Men (n=923)</td>
</tr>
<tr>
<td>• Hispanic (n=413)</td>
<td></td>
<td>• Other/prefer not to say (n=14)</td>
</tr>
<tr>
<td>• Asian (n=149)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• BIPOC (n=872)</td>
<td></td>
<td></td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Education (n=113)</td>
</tr>
<tr>
<td>• Finance (n=164)</td>
</tr>
<tr>
<td>• Healthcare (n=210)</td>
</tr>
<tr>
<td>• Tech (n=146)</td>
</tr>
<tr>
<td>• Academia (n=14)</td>
</tr>
<tr>
<td>• Other industry (n=863)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Primary child care</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Daycare/preschool (n=597)</td>
</tr>
<tr>
<td>• Nanny (n=256)</td>
</tr>
<tr>
<td>• Stay at home (n=742)</td>
</tr>
<tr>
<td>• Work from home (n=454)</td>
</tr>
<tr>
<td>• Family/friends (n=626)</td>
</tr>
<tr>
<td>• After school programs (n=536)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Work status</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Working parents (n=1466)</td>
</tr>
<tr>
<td>• Employed full time (n=1261)</td>
</tr>
<tr>
<td>• Employed part time (n=205)</td>
</tr>
</tbody>
</table>