

Bipartisan Policy Center

Parent Child Care Preferences: Are They Changing?

Highlights from a nationwide
child care market survey

January 22, 2021



Survey Objectives

Goals of the December 2020 Child Care Survey

- Understand the factors that influence parents' child care decisions.
- Determine whether or not parents are using their ideal child care arrangements
- Measure the trade-offs parents are making when choosing child care
- Determine the impact of a COVID-19 vaccine on future child care decisions.



Parent Survey Series

BPC and Morning Consult have conducted a series of parent surveys to understand parents' need and preferences for child care.

October 2019

The Impact of Child Care
Costs on Parents

April 2020

Child Care in the
Time of Coronavirus

August 2020

Child Care in COVID-19:
Another Look at
Parents' Perspectives

December 2020

Parent Child Care
Preferences: Are They
Changing?

Parent Survey Series: <https://bipartisanpolicy.org/blog/parent-survey-resource-center/>



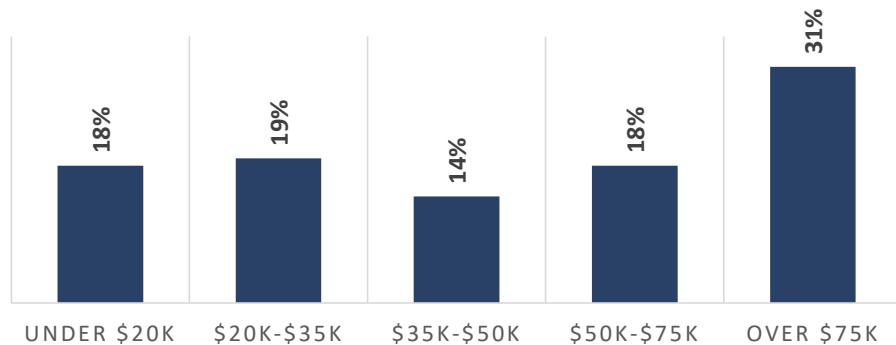
Methodology

- Survey conducted from December 11-16, 2020 among 1,500 parents with children under age 5.
- Data weighted to approximate target sample of parents with children under age 5 based on age, gender, education attainment, race, ethnicity, & region.
- Results have a margin of error of +/- 3 percentage points.
- Questions focused on a parent's decisions for their youngest child.

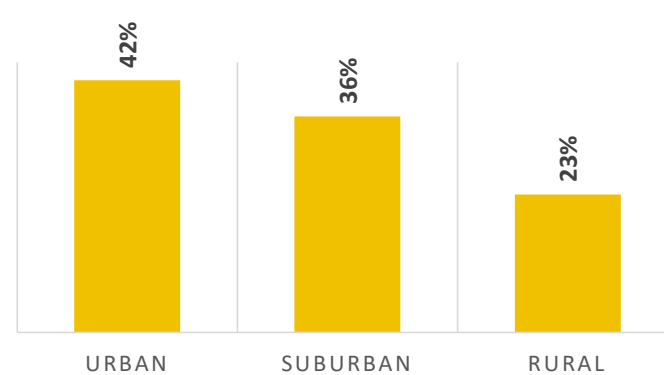


Respondent Profile

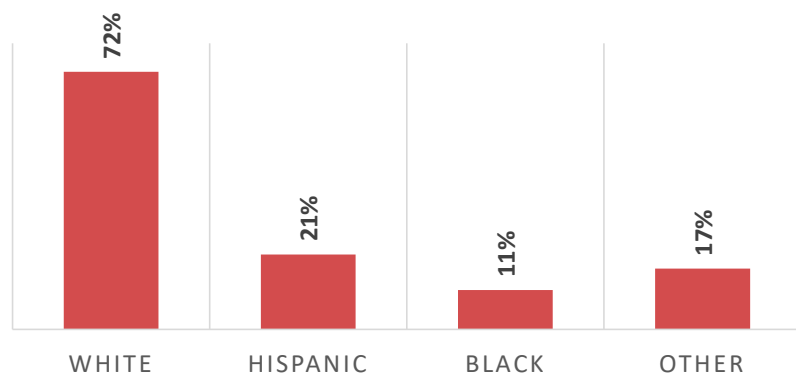
HOUSEHOLD INCOME



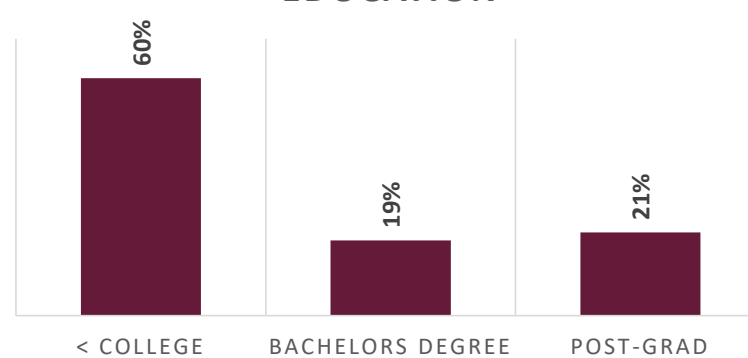
COMMUNITY TYPE



ETHNICITY

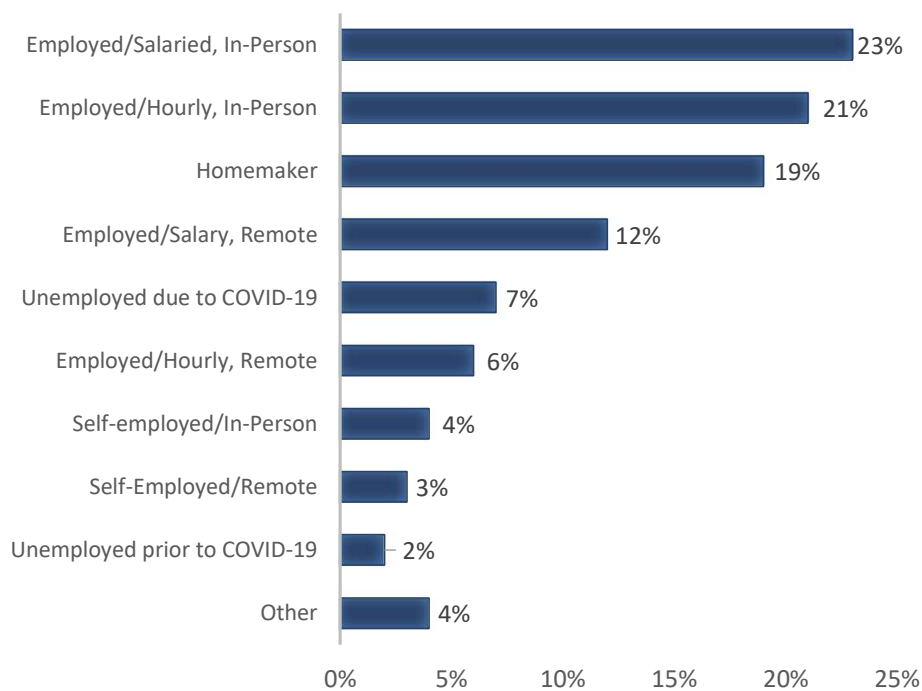


EDUCATION



Employment Demographics

EMPLOYMENT STATUS (DECEMBER 2020)



ESSENTIAL WORKERS

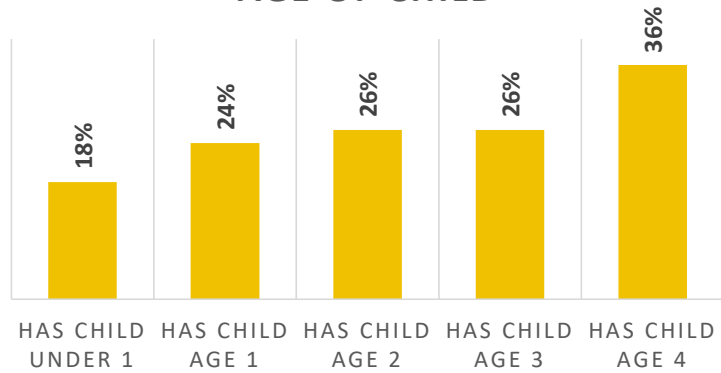


Among all survey respondents, 69% are in households with a single parent or two working parents.

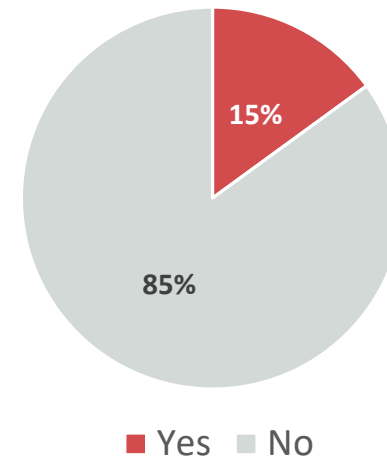


Family Demographics

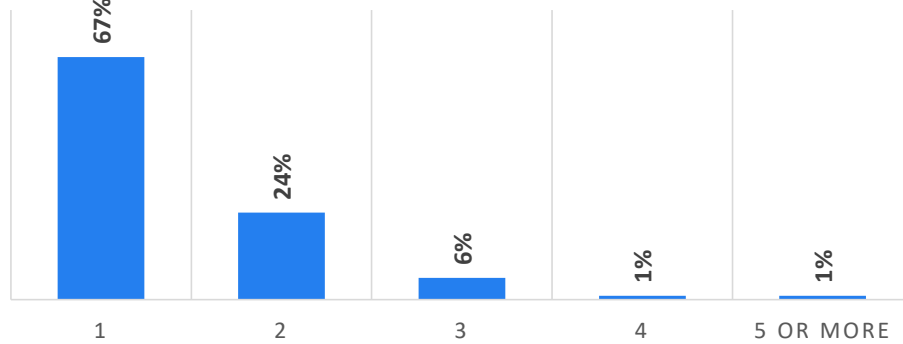
AGE OF CHILD



GRANDPARENT IN THE HOUSEHOLD



NUMBER OF CHILDREN UNDER AGE 5

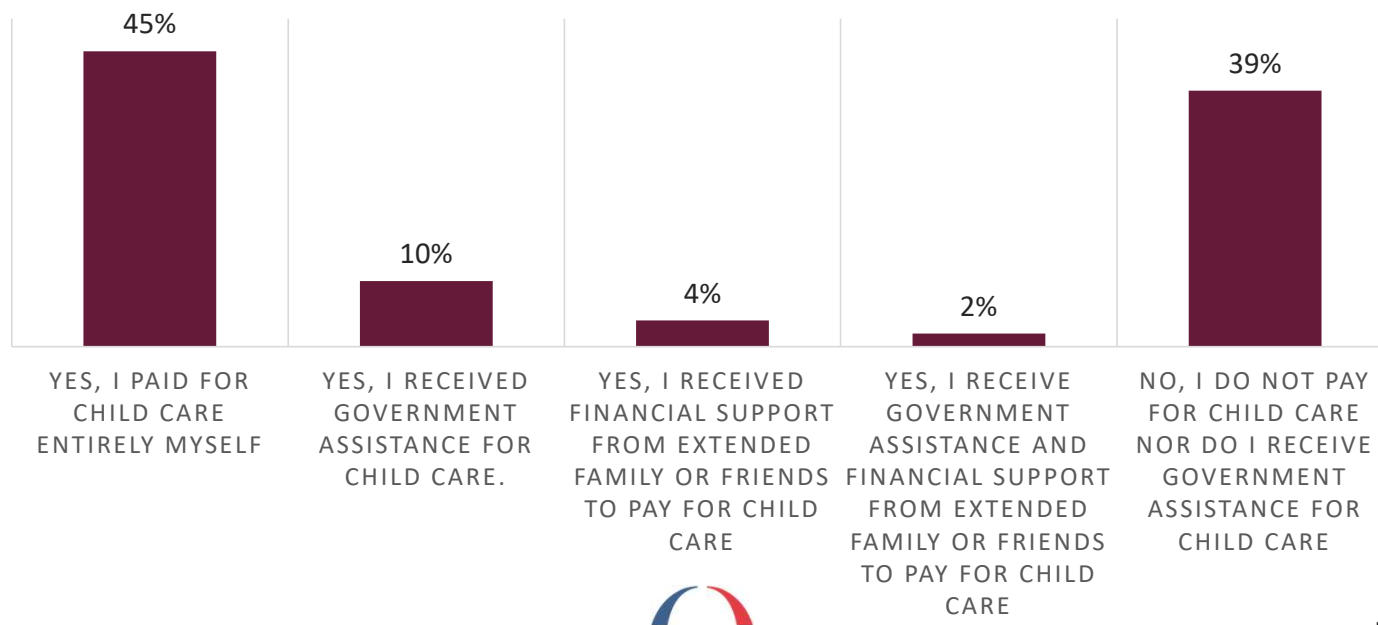


Paying for Child Care

Nearly half of parents reported paying for child care without support in January 2020, whereas 39% did not pay for care.

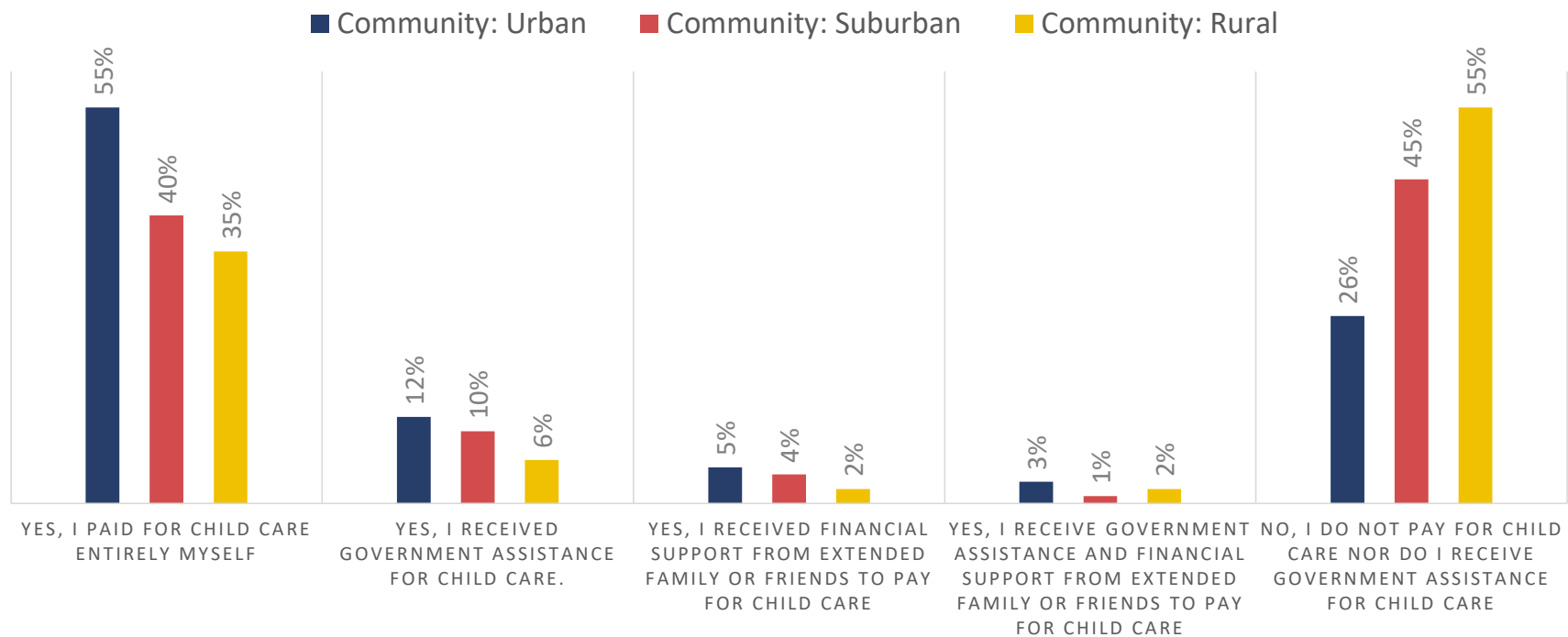
Of the households with a single parent or two working parents:

- 54% paid for child care
- 29% did not



Paying for Child Care

Over half of parents in rural communities were not paying for child care in January 2020.



Women Leaving the Workforce

A BPC/Morning Consult survey conducted in October 2020 found that:

- Among women who left the workforce during the pandemic, 16% cited caregiving responsibilities due to child care provider and school closures as their reason for leaving.
- Women were twice as likely as men to say they left the workforce for caregiving responsibilities due to child care provider or school closures (16% vs. 8%).
- Read more here: <https://bipartisanpolicy.org/blog/facing-caregiving-challenges/>

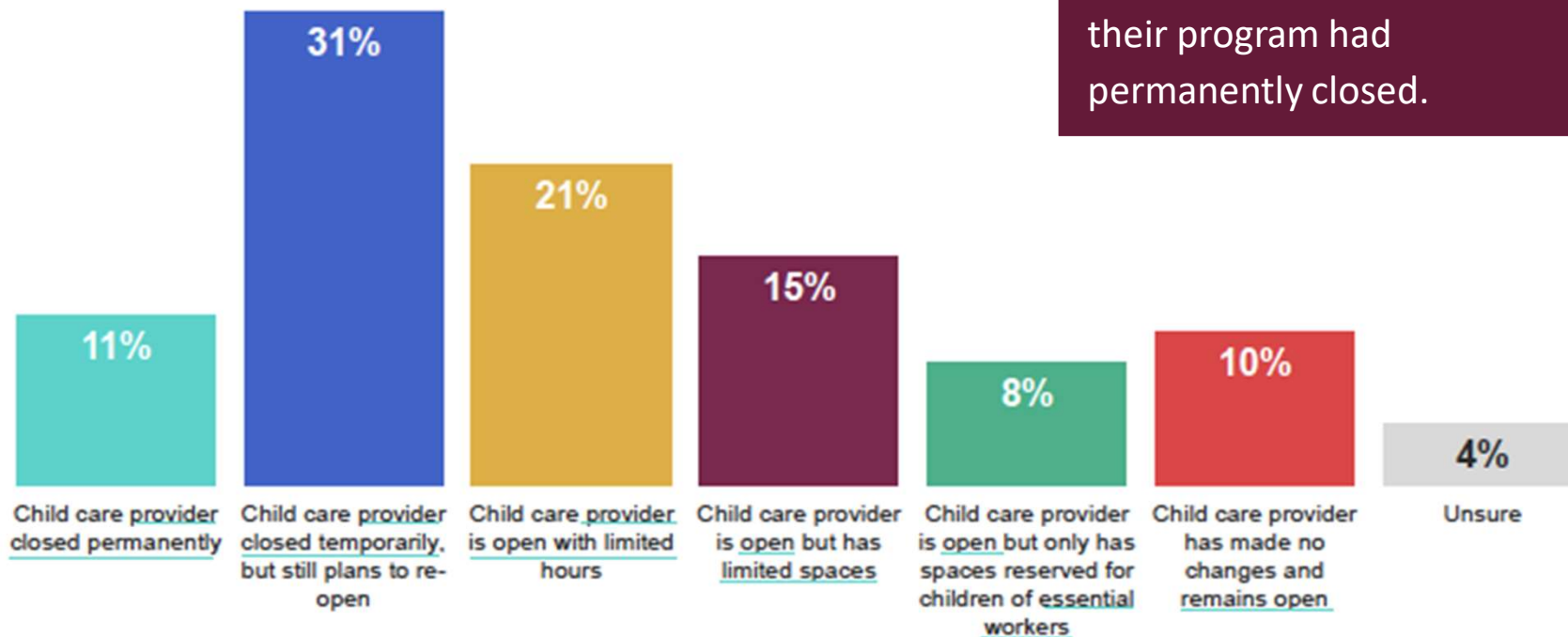


Overview of Key Findings



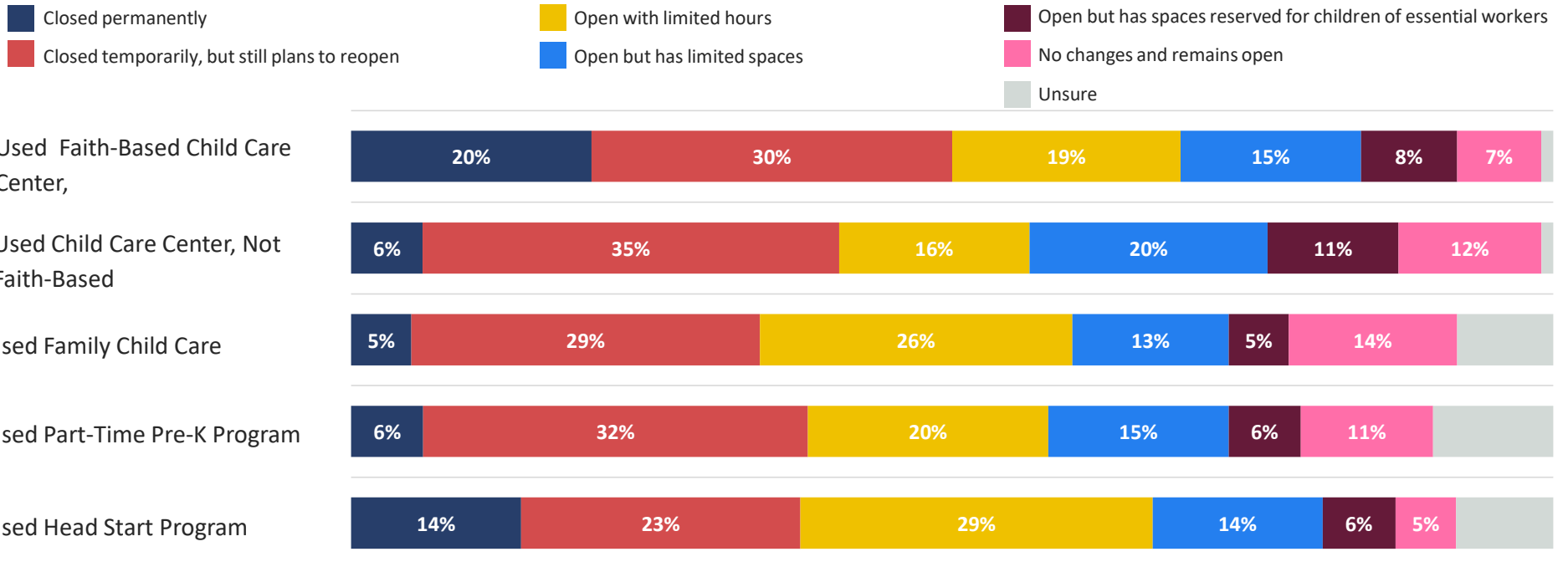
Current Operating Status as of December 2020

Among parents using a formal care arrangement in January 2020, 11% reported their program had permanently closed.



Current Operating Status

Parents reported their faith-based programs have closed at much higher rates than other provider types.



Implications of Vaccine Availability

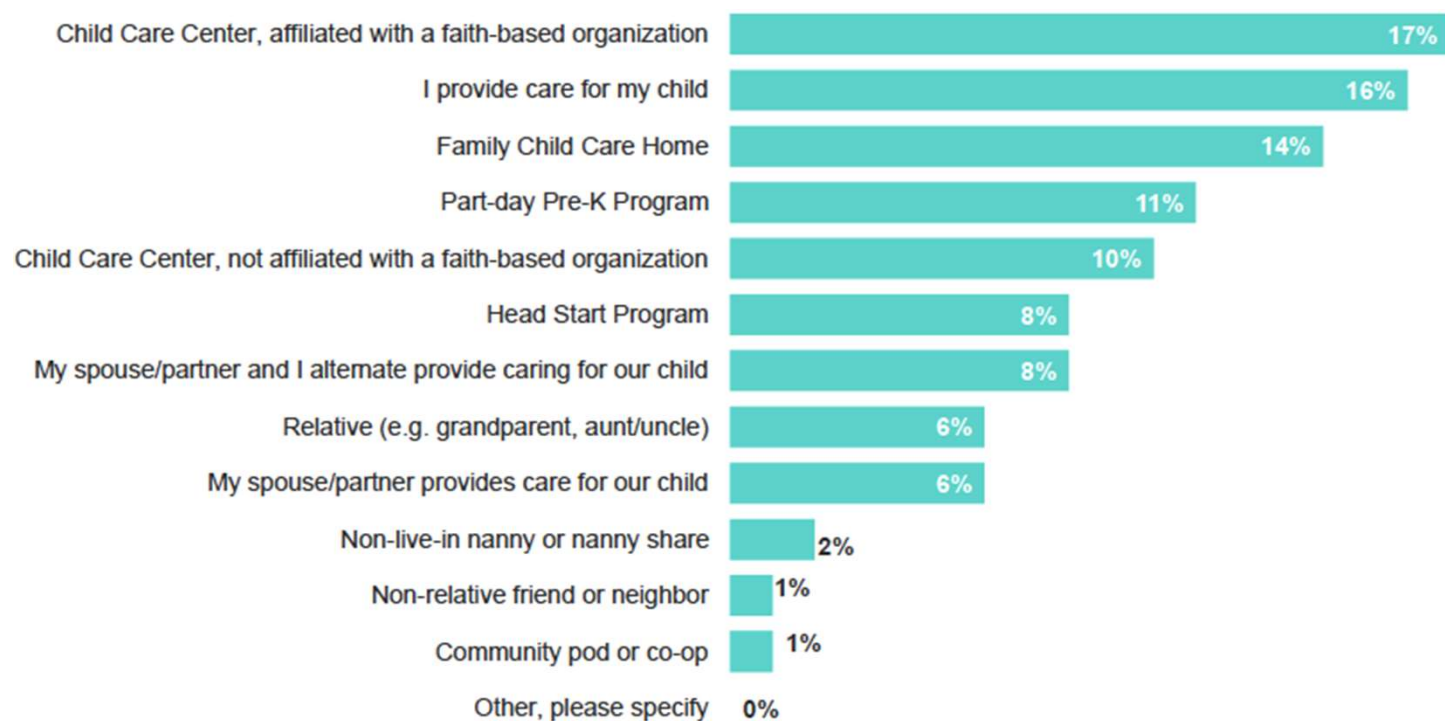
- Prioritizing vaccines for child care workers would significantly change parent child care decisions during the pandemic.
- This is particularly important to male respondents, parents with higher levels of education and income, and parents in urban communities.

Child Care Choices Differ Based on Who Receives the Vaccine	
Will consider a different child care arrangement due to a vaccine	48%
Will consider a different child care arrangement if...	
• Everyone in their Community is Vaccinated	2%
• Their Family is Vaccinated	8%
• Their Child Care Workers are Vaccinated	38%



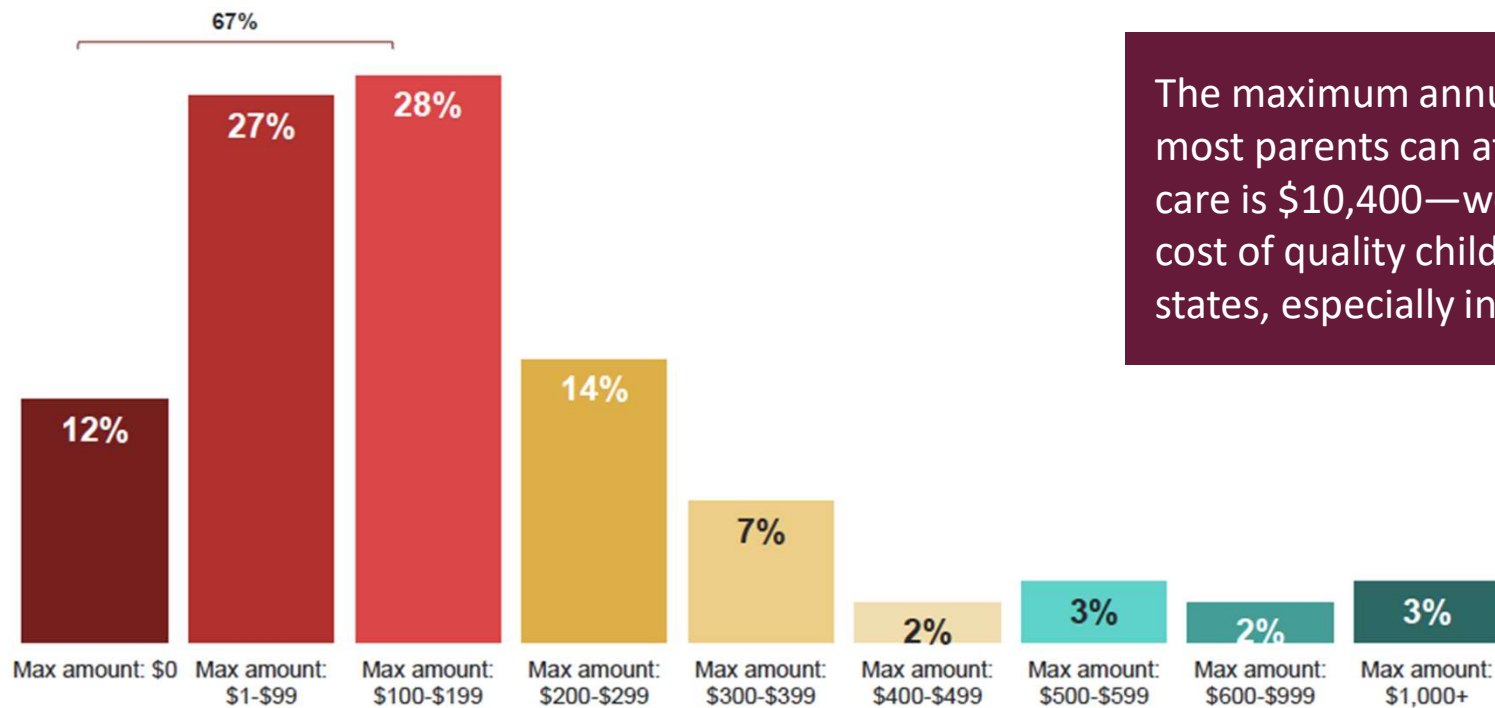
Implications of Vaccine Availability

Parents who would consider changing their child care arrangement due to the COVID-19 vaccine are split on which arrangement they would choose.



Child Care Affordability

Two thirds of parents say the maximum amount their household can afford for child care each week per child is less than \$200.

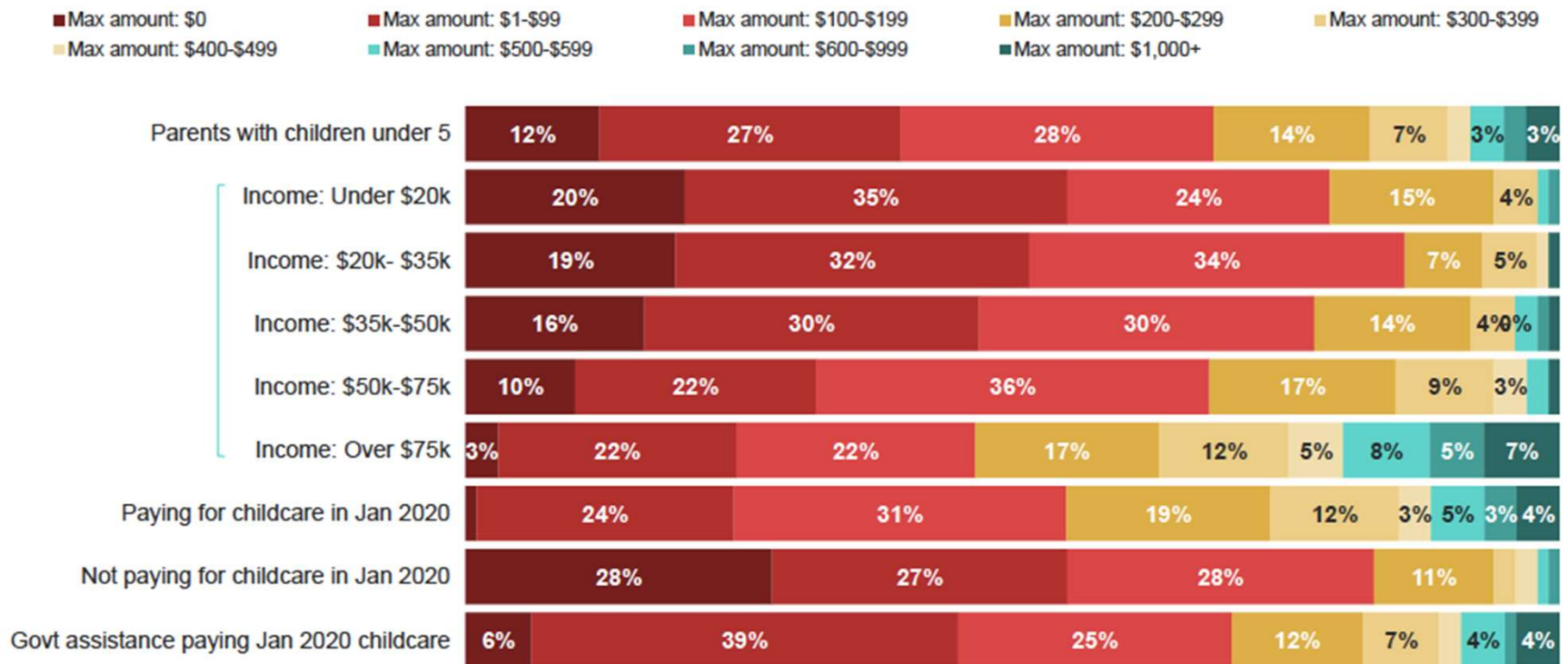



The maximum annual amount most parents can afford for child care is \$10,400—well below the cost of quality child care in many states, especially infant care.



Child Care Affordability

Over one-quarter of parents not paying for child care in January 2020 reported they cannot afford to pay anything for child care in December.





Understanding Parent Choice in Selecting a Child Care Provider



Max-Diff Methodology

Parents made a series of forced choice responses about *the most important and least important factors* for selecting a child care provider.

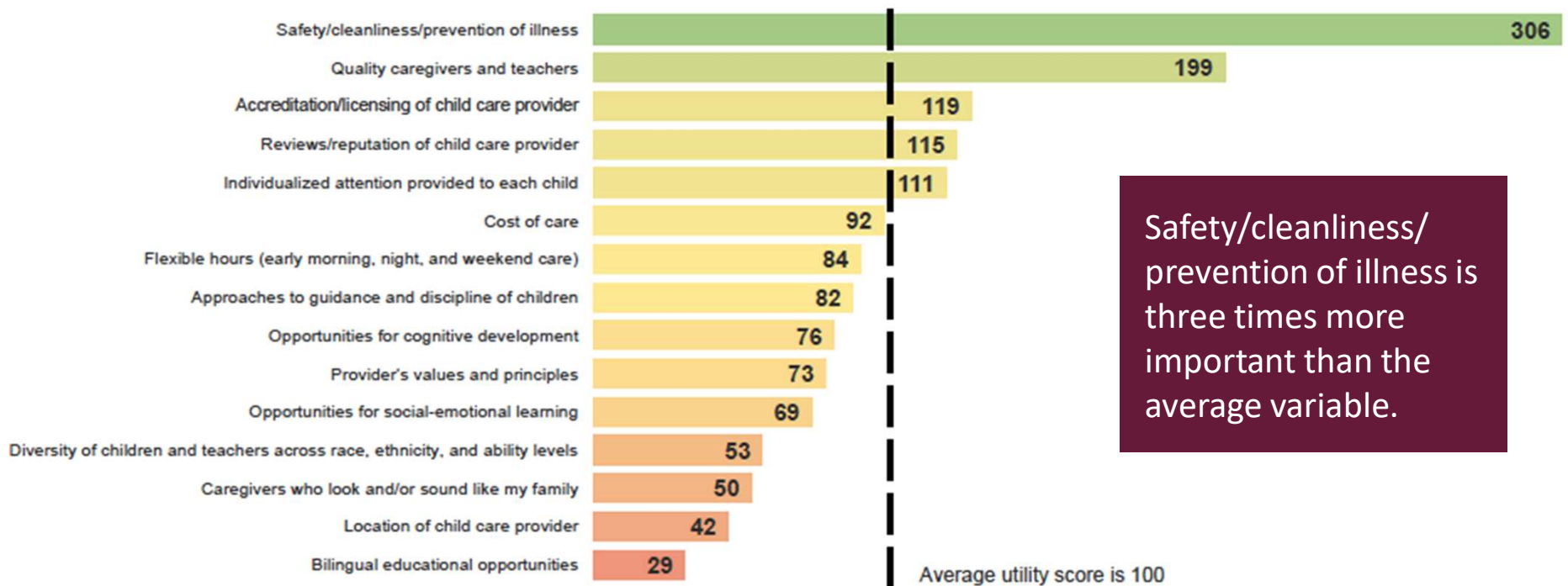
Parents considered 15 factors:

- Location of child care provider
- Individualized attention provided to each child
- Reviews/reputation of child care provider
- Accreditation/licensing of child care provider
- Quality caregivers and teachers
- Safety/cleanliness/prevention of illness
- Opportunities for cognitive development
- Opportunities for social-emotional learning
- Provider's values and principles
- Flexible hours (early morning, night, and weekend care)
- Cost of care
- Bilingual educational opportunities
- Diversity of children and teachers across race, ethnicity, and ability levels
- Caregivers who look and/or sound like my family
- Approaches to guidance and discipline of children



Max-Diff Findings

Safety/cleanliness/prevention of illness is the most important factor to parents when selecting a child care provider for their youngest child at this time.



Max-Diff Findings

Safety/cleanliness/prevention of illness is particularly important to parents with lower income and education levels, parents in the Midwest and South, and parents in suburban and rural communities.

Safety/Cleanliness/Prevention of Illness

Parents	Educ: < College	Educ: Bachelors degree	Educ: Post-grad	
306	331	269	266	
Parents	Income: Under 50k	Income: 50k-100k	Income: 100k+	
306	331	295	257	
Parents	4-Region: Northeast	4-Region: Midwest	4-Region: South	4-Region: West
306	280	321	328	276
Parents	Community: Urban	Community: Suburban	Community: Rural	
306	277	328	323	



Max-Diff Findings

Suburban and rural parents place higher importance on reviews/reputation of a child care provider than parents in urban communities.

	Parents	Community: Urban	Community: Suburban	Community: Rural
Average utility score				
Safety/cleanliness/prevention of illness	306	277	328	323
Quality caregivers and teachers	199	180	215	210
Accreditation/licensing of child care provider	119	106	133	121
Reviews/reputation of child care provider	115	100	130	118
Individualized attention provided to each child	111	112	110	110
Cost of care	92	85	89	108
Flexible hours (early morning, night, and weekend care)	84	94	70	88
Approaches to guidance and discipline of children	82	88	75	81
Opportunities for cognitive development	76	79	77	68
Provider's values and principles	73	77	70	72
Opportunities for social-emotional learning	69	81	61	58
Diversity of children and teachers across race, ethnicity, and ability levels	53	71	42	37
Caregivers who look and/or sound like my family	50	61	39	45
Location of child care provider	42	50	38	36
Bilingual educational opportunities	29	39	22	22



Max-Diff Findings

Hispanic parents place more importance on reviews/reputation of child care provider compared to parents of other racial and ethnic groups.

	Parents	Ethnicity: White	Ethnicity: Hispanic	Ethnicity: Black/Other
Safety/cleanliness/prevention of illness	306	311	272	326
Quality caregivers and teachers	199	214	169	187
Accreditation/licensing of child care provider	119	113	132	124
Reviews/reputation of child care provider	115	105	143	114
Individualized attention provided to each child	111	114	99	115
Cost of care	92	99	81	79
Flexible hours (early morning, night, and weekend care)	84	85	89	77
Approaches to guidance and discipline of children	82	79	89	84
Opportunities for cognitive development	76	74	76	82
Provider's values and principles	73	71	76	78
Opportunities for social-emotional learning	69	66	76	71
Diversity of children and teachers across race, ethnicity, and ability levels	53	52	56	56
Caregivers who look and/or sound like my family	50	51	53	43
Location of child care provider	42	42	50	34
Bilingual educational opportunities	29	25	39	29



Max-Diff Findings

Cost of care is a particularly important factor to parents in the Midwest when selecting a child care provider for their youngest child.

	Parents	4-Region: Northeast	4-Region: Midwest	4-Region: South	4-Region: West
Safety/cleanliness/prevention of illness	306	280	321	328	276
Quality caregivers and teachers	199	172	200	205	208
Accreditation/licensing of child care provider	119	108	134	127	102
Reviews/reputation of child care provider	115	100	122	111	122
Individualized attention provided to each child	111	117	105	114	109
Cost of care	92	72	114	88	90
Flexible hours (early morning, night, and weekend care)	84	97	87	79	81
Approaches to guidance and discipline of children	82	83	76	81	88
Opportunities for cognitive development	76	80	66	74	84
Provider's values and principles	73	73	68	73	79
Opportunities for social-emotional learning	69	79	63	62	77
Diversity of children and teachers across race, ethnicity, and ability levels	53	63	43	49	63
Caregivers who look and/or sound like my family	50	82	42	42	48
Location of child care provider	42	56	36	44	36
Bilingual educational opportunities	29	39	22	23	37



Max-Diff Findings

Across age of parents' youngest child, safety/cleanliness/prevention of illness and quality caregivers and teachers are the most important factors when selecting a provider.

	Parents	Age of Youngest: < 1	Age of Youngest: 1	Age of Youngest: 2	Age of Youngest: 3	Age of Youngest: 4
Average utility score						
Safety/cleanliness/prevention of illness	306	325	304	274	322	310
Quality caregivers and teachers	199	203	195	201	181	213
Accreditation/licensing of child care provider	119	124	119	124	115	115
Reviews/reputation of child care provider	115	113	114	126	117	105
Individualized attention provided to each child	111	111	116	112	99	115
Cost of care	92	93	89	103	83	90
Flexible hours (early morning, night, and weekend care)	84	78	80	87	84	93
Approaches to guidance and discipline of children	82	81	82	83	86	76
Opportunities for cognitive development	76	88	69	80	72	69
Provider's values and principles	73	68	73	81	75	69
Opportunities for social-emotional learning	69	62	72	76	67	65
Diversity of children and teachers across race, ethnicity, and ability levels	53	53	50	55	61	49
Caregivers who look and/or sound like my family	50	36	66	32	62	51
Location of child care provider	42	38	45	36	44	49
Bilingual educational opportunities	29	28	27	29	33	28



Max-Diff Findings

- While diversity of children and teachers, caregivers who look and/or sound like my family, and bilingual educational opportunities were less important than other factors across all parents, those in urban communities found these factors more important than other community types.
- Caregivers who look and sound like my family is more important to parents in the Northeast than other regions of the country.
- Opportunities for social-emotional learning is a more important factor to parents in urban communities than to parents in rural and suburban communities.
- Cost of care is more important to parents in rural communities than parents in suburban and urban communities.



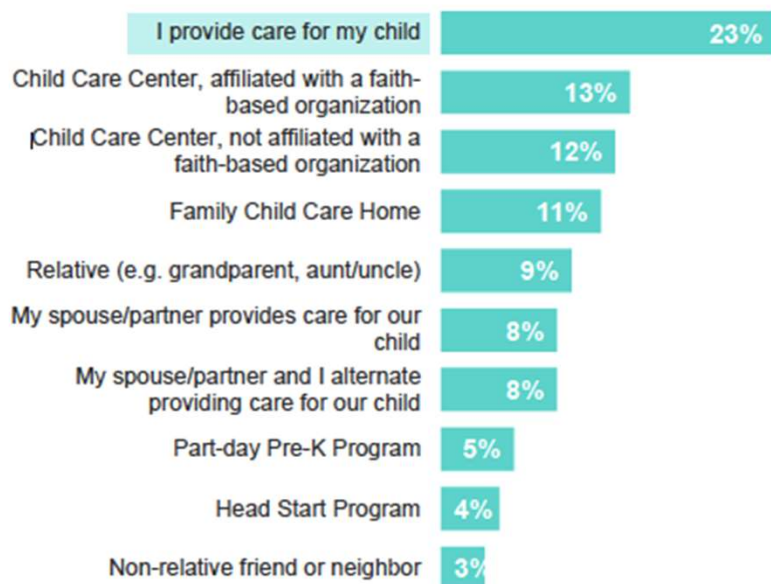
Child Care Arrangements During COVID-19



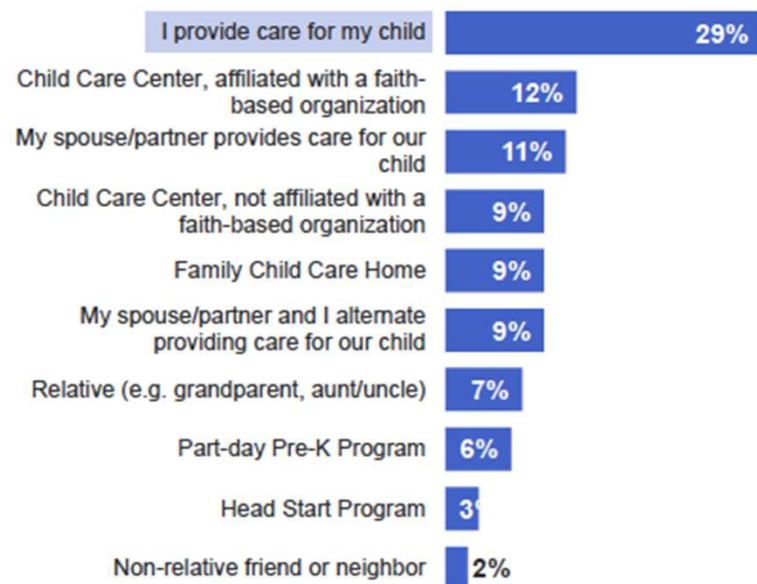
Child Care Arrangements During COVID-19

Parents are now more likely to be providing child care themselves compared to January 2020.

Which of the following best describe the primary child care arrangement you used in **January 2020** for your youngest child?



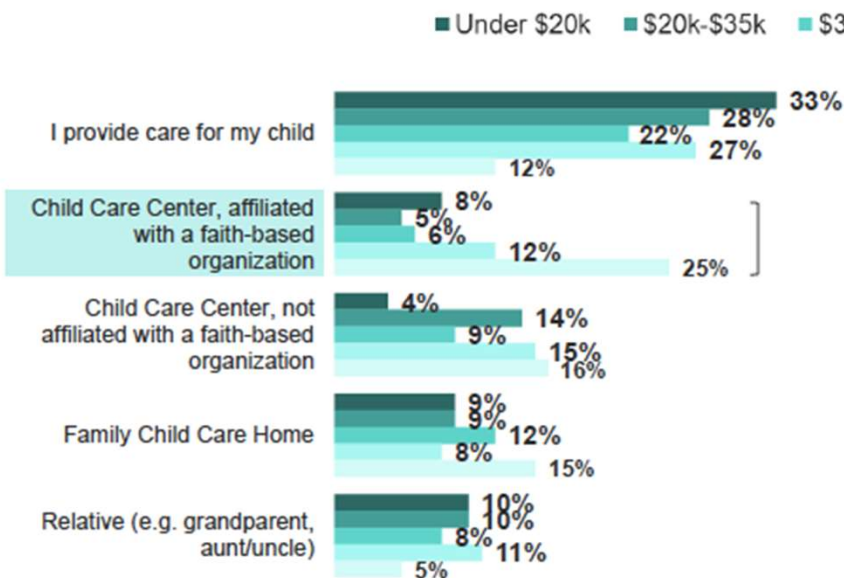
Which of the following best describe the **current primary** child care arrangement for your youngest child?



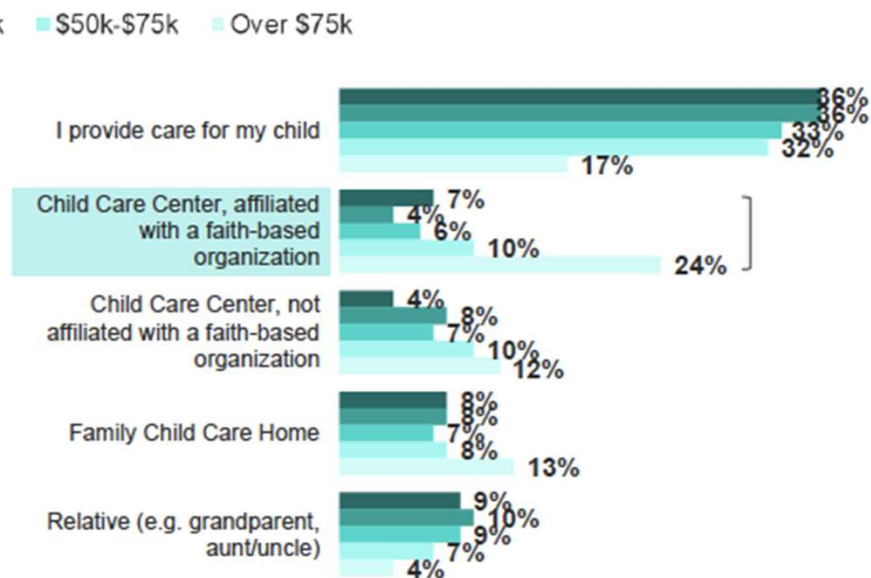
Child Care Arrangements During COVID-19

A plurality of parents with income less than \$75,000 are providing child care themselves during the pandemic, an increase from January 2020.

Which of the following best describe the primary child care arrangement you used in **January 2020** for your youngest child?



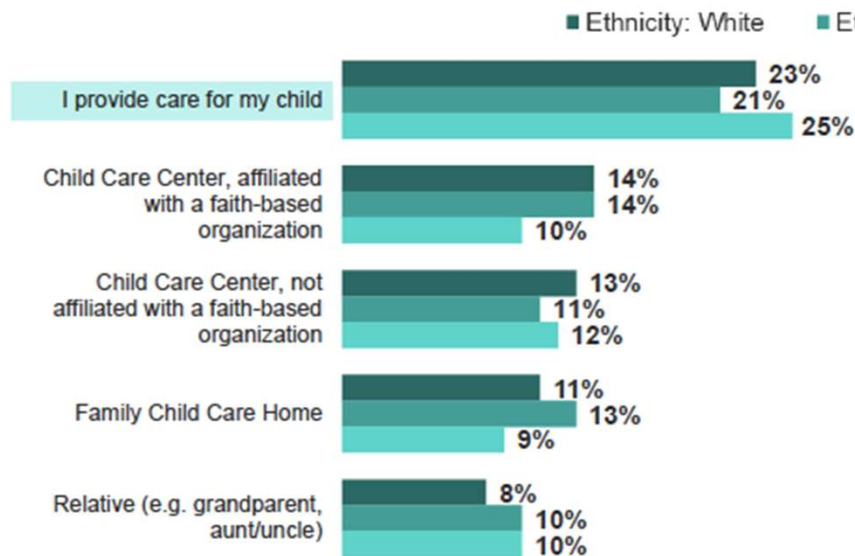
Which of the following best describe the **current primary** child care arrangement for your youngest child?



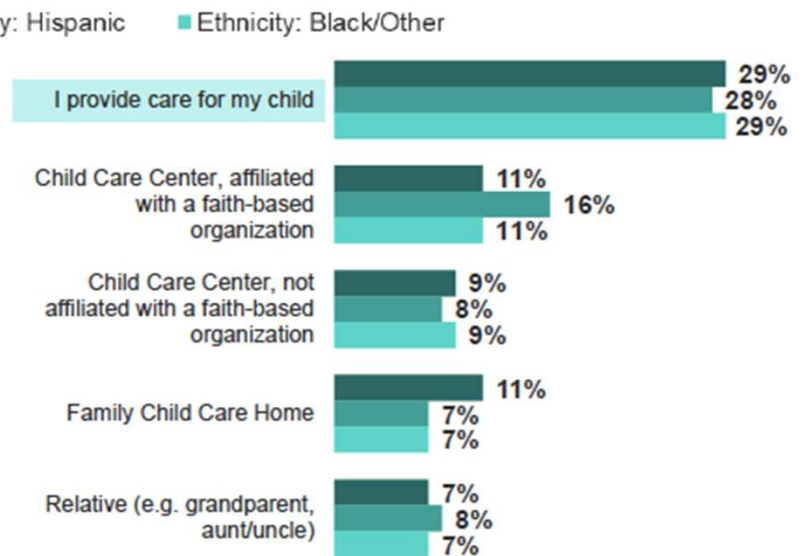
Child Care Arrangements During COVID-19

Parents across racial and ethnic groups provide care for their children at a higher rate today than they did in January 2020. Hispanic families, however, show higher rates of using faith-based child care centers during the pandemic.

Which of the following best describe the primary child care arrangement you used in **January 2020** for your youngest child?



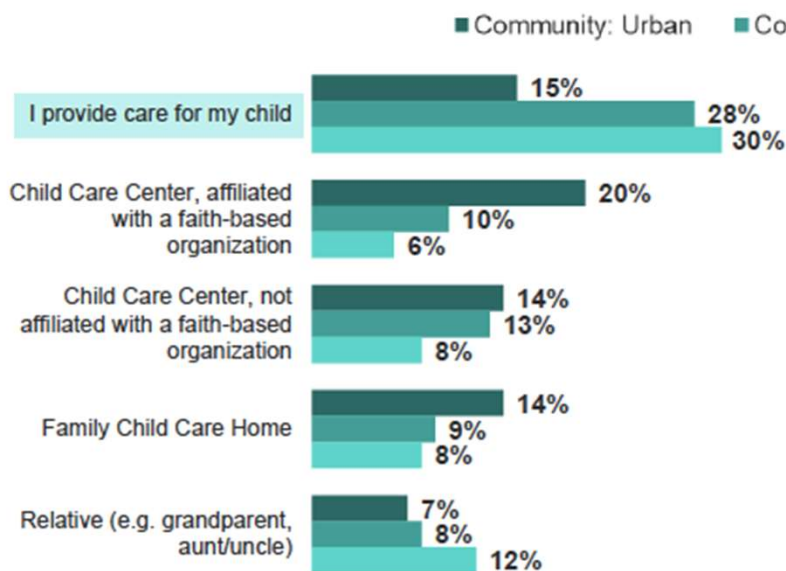
Which of the following best describe the **current primary** child care arrangement for your youngest child?



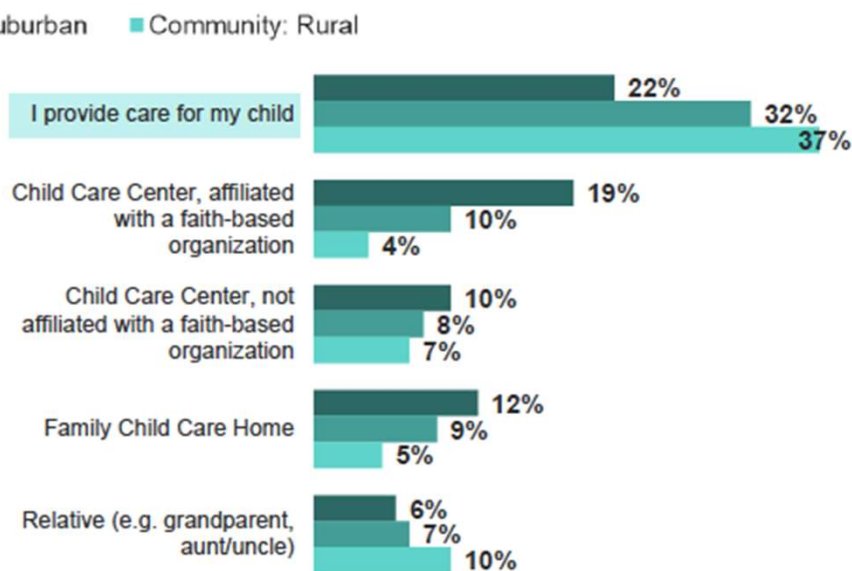
Child Care Arrangements During COVID-19

Prior to and during the pandemic, parents in suburban and rural communities provide care for their children at higher rates than in urban communities, while parents in urban communities rely on faith-based child care programs.

Which of the following best describe the primary child care arrangement you used in **January 2020** for your youngest child?



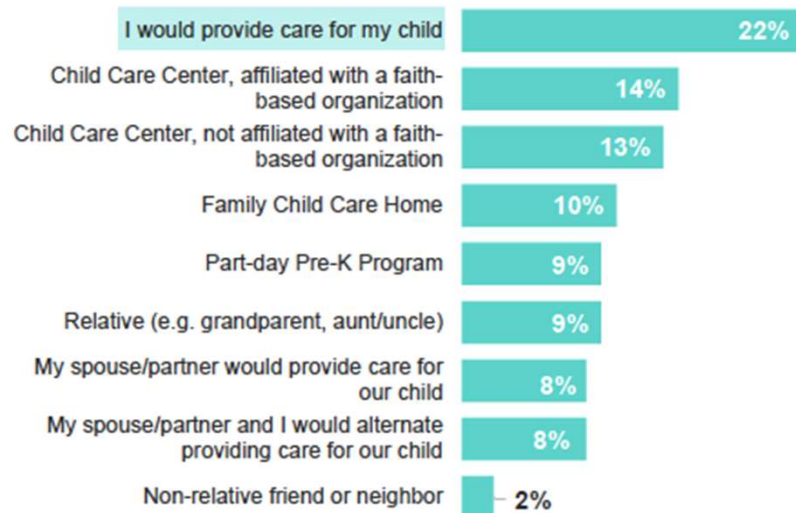
Which of the following best describe the **current primary** child care arrangement for your youngest child?



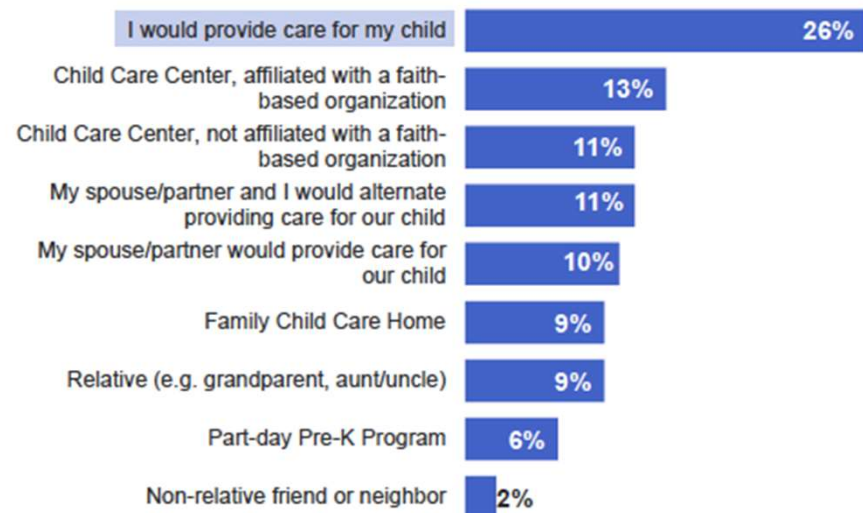
Ideal Child Care Arrangements

A plurality of parents report their ideal child care arrangement—now and in January 2020—is to provide care for their own child, followed by child care centers.

Thinking back to January 2020, if all types of child care arrangements were equally priced and equally accessible to your family, what would have been your **ideal child care arrangement** for your youngest child?



Right now, during COVID-19, if all types of arrangements were equally priced and equally accessible to your family, what would be your **ideal child care arrangement** for your youngest child?



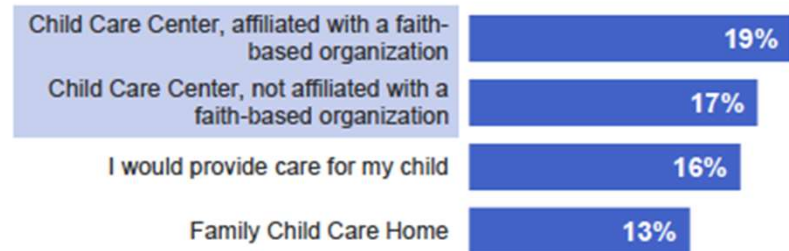
Ideal Child Care Arrangements

- Parents paying for child care in January 2020 reported that their ideal arrangement—now and during COVID-19—is a child care center.
- During the pandemic, more parents said their ideal child care arrangement is to provide care themselves than in January.

Thinking back to January 2020, if all types of child care arrangements were equally priced and equally accessible to your family, what would have been your **ideal child care arrangement** for your youngest child?



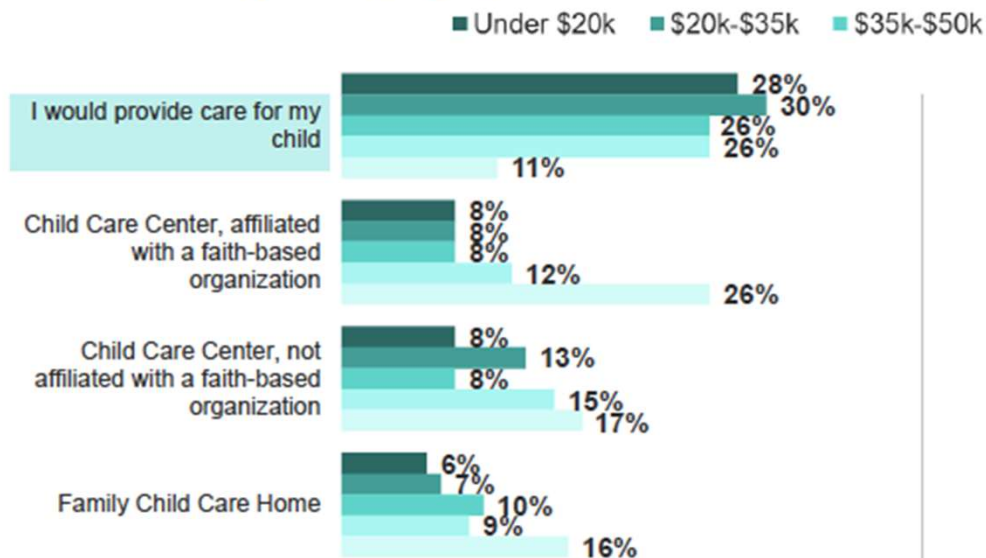
Right now, during COVID-19, if all types of arrangements were equally priced and equally accessible to your family, what would be your **ideal child care arrangement** for your youngest child?



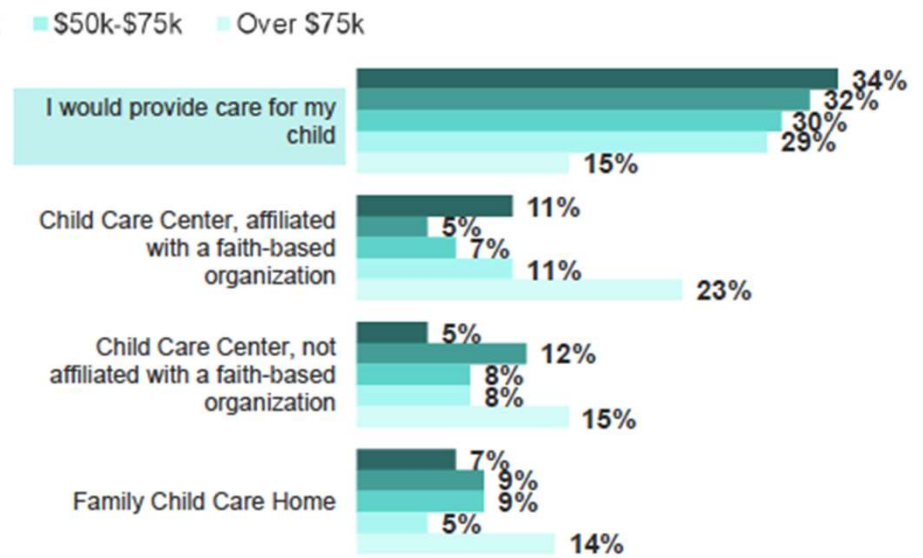
Ideal Child Care Arrangements

The ideal child care arrangement for higher income families is a faith-based child care center, whereas lower income families prefer to provide care for their youngest child.

Thinking back to January 2020, if all types of child care arrangements were equally priced and equally accessible to your family, what would have been your ideal child care arrangement for your youngest child?



Right now, during COVID-19, if all types of arrangements were equally priced and equally accessible to your family, what would be your ideal child care arrangement for your youngest child?

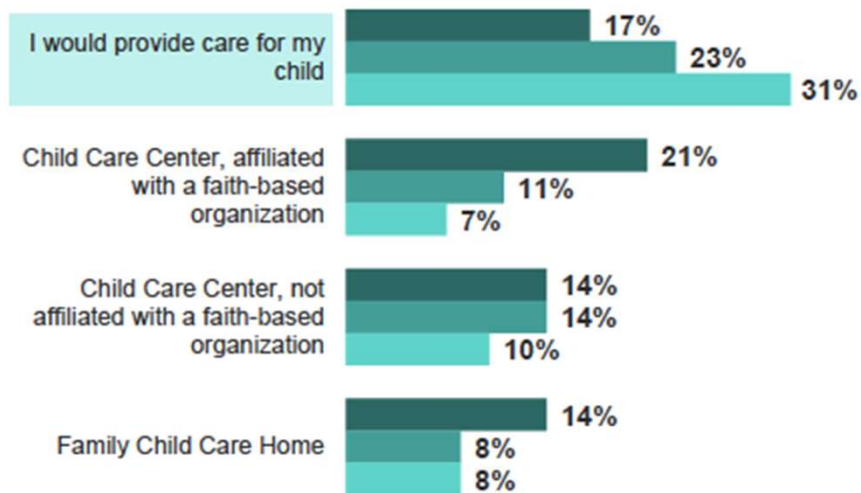


Ideal Child Care Arrangements

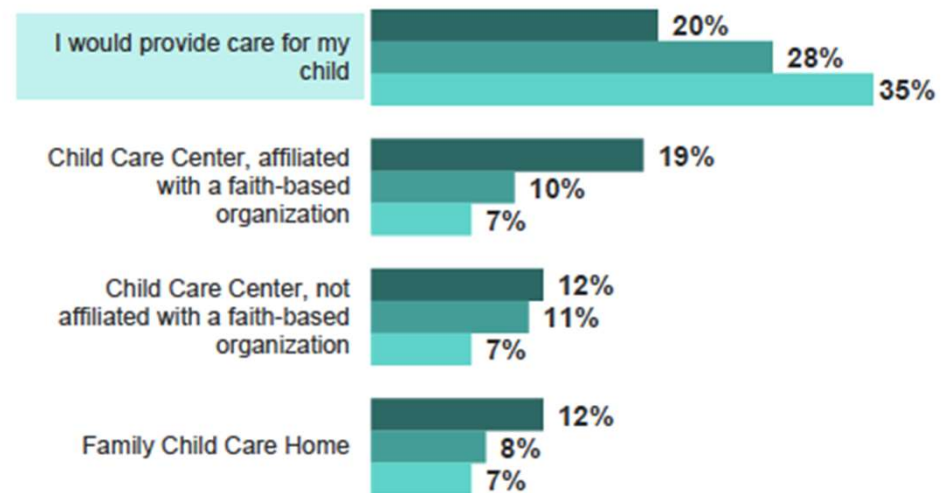
Rural parents are more likely than suburban and urban parents to indicate their ideal care arrangement in January and December 2020 is providing care themselves.

Thinking back to January 2020, if all types of child care arrangements were equally priced and equally accessible to your family, what would have been your ideal child care arrangement for your youngest child?

■ Community: Urban ■ Community: Suburban ■ Community: Rural



Right now, during COVID-19, if all types of arrangements were equally priced and equally accessible to your family, what would be your ideal child care arrangement for your youngest child?



Ideal Child Care Arrangements

Parents who provided care for their own children or who used a faith-based center or relative in December 2020 said they were using their ideal child care arrangement.

Current Child Care Provider	Child Care Center, affiliated with a faith-based organization	Child Care Center, not affiliated with a faith-based organization	Family Child Care Home	Part-day Pre-K Program	Relative (e.g. grandparent, aunt/uncle)	I provide care for my child	My spouse/partner provides care for our child	My spouse/partner and I alternate providing care for our child	Head Start Program
<i>Current Child Care Provider N Size</i>	182	132	140	83	109	434	158	141	51
<i>Ideal Current Child Care Provider</i> Child Care Center, affiliated with a faith-based organization	77%	7%	4%	8%	3%	3%	2%	8%	2%
Child Care Center, not affiliated with a faith-based organization	4%	67%	8%	6%	3%	4%	5%	6%	5%
Family Child Care Home	5%	5%	58%	11%	0%	3%	3%	3%	18%
Part-day Pre-K Program	2%	6%	6%	40%	7%	3%	4%	4%	12%
Relative (e.g. grandparent, aunt/uncle)	1%	1%	5%	5%	74%	3%	4%	12%	7%
I would provide care for my child	2%	9%	10%	11%	8%	73%	5%	6%	19%
My spouse/partner would provide care for our child	6%	3%	5%	11%	1%	3%	52%	7%	14%
My spouse/partner and I would alternate providing care for our child	2%	2%	4%	3%	3%	6%	23%	53%	14%



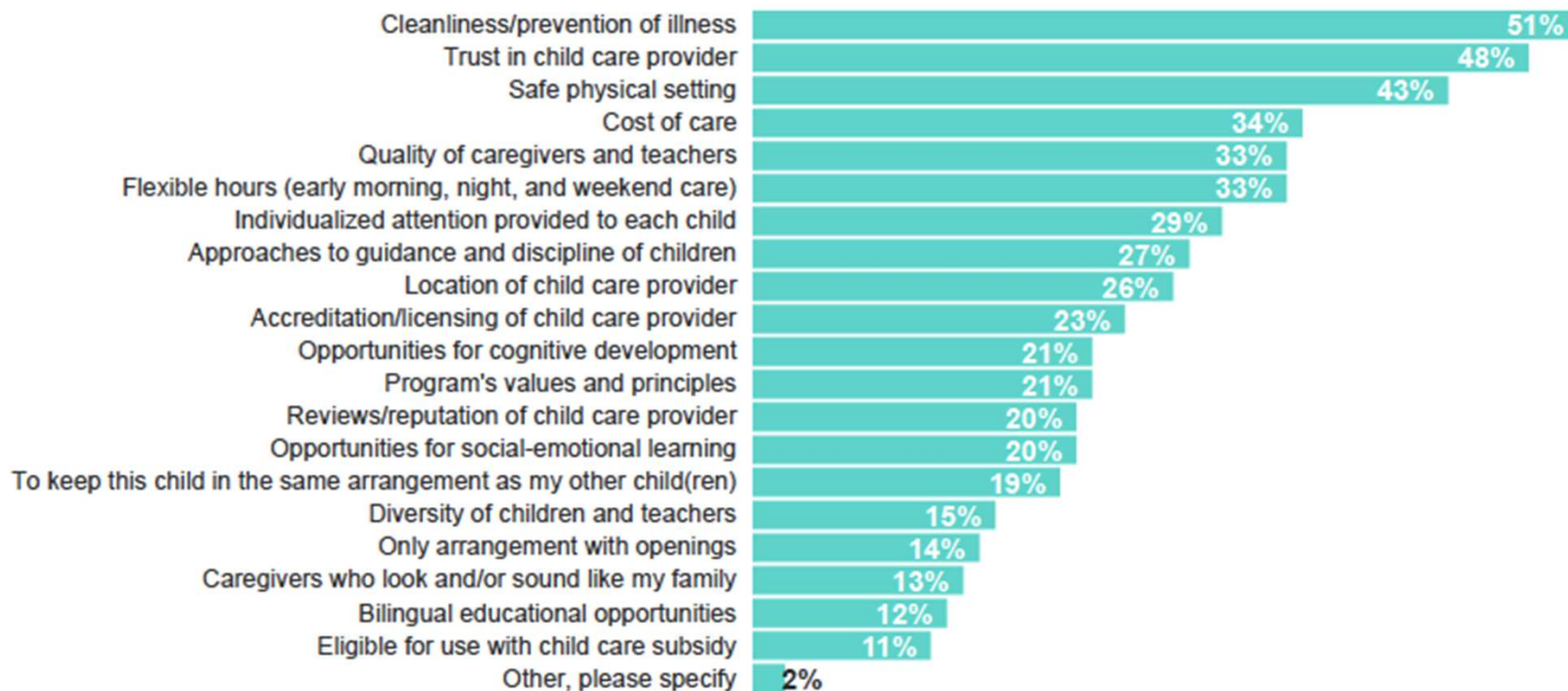


Parent Preferences: Important Factors for Selecting a Provider



Important Factors for Parents

Parents prioritize cleanliness/prevention of illness, trust, and safe physical setting when selecting their child care arrangement.



Important Factors for Parents

Cleanliness/prevention of illness and safe physical setting are important factors to lower-income families when selecting a child care arrangement.

Most Important* Factors For Child Care Arrangement During COVID-19 By Income Level				
	Parents	Income: Under 50k	Income: 50k-100k	Income: 100k+
Cleanliness/prevention of illness	51%	55%	48%	42%
Trust in child care provider	48%	48%	50%	45%
Safe physical setting	43%	49%	36%	37%
Cost of care	34%	42%	31%	17%
Quality of caregivers and teachers	33%	29%	35%	40%
Flexible hours (early morning, night, and weekend care)	33%	30%	32%	42%
Individualized attention provided to each child	29%	27%	37%	20%
Approaches to guidance and discipline of children	27%	24%	30%	32%
Location of child care provider	26%	26%	29%	21%
Accreditation/licensing of child care provider	23%	21%	23%	28%
Opportunities for cognitive development	21%	20%	19%	25%
Program's values and principles	21%	15%	26%	29%
Reviews/reputation of child care provider	20%	19%	22%	20%
Opportunities for social-emotional learning	20%	20%	19%	22%
Diversity of children and teachers	15%	12%	16%	19%
Only arrangement with openings	14%	16%	11%	12%
Caregivers who look and/or sound like my family	13%	16%	10%	11%
Bilingual educational opportunities	12%	11%	9%	18%
Eligible for use with child care subsidy	11%	10%	11%	14%



Important Factors for Parents

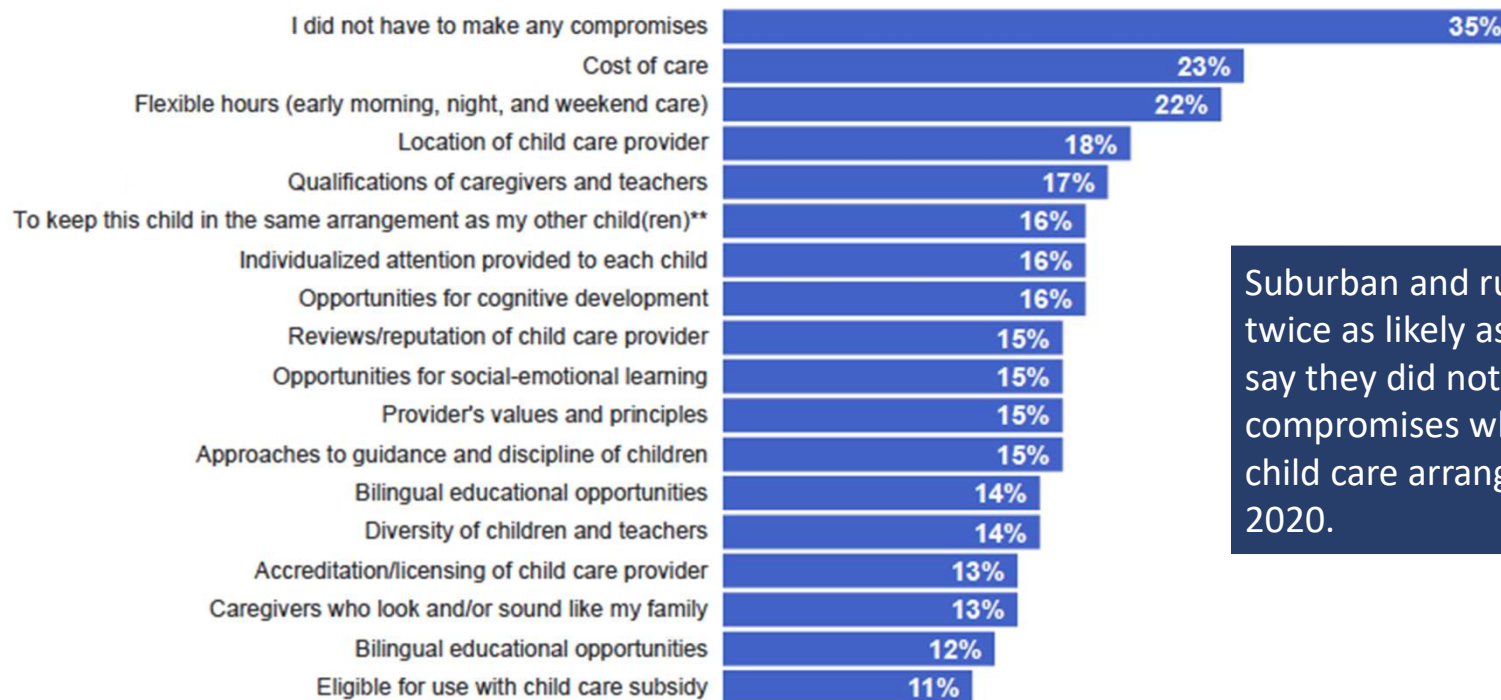
Half of parents in rural communities selected cost of care as an important factor when selecting their child care provider.

Most Important* Factors For Child Care Arrangement During COVID-19 By Community Type				
	Parents	Community: Urban	Community: Suburban	Community: Rural
Cleanliness/prevention of illness	51%	42%	57%	61%
Trust in child care provider	48%	44%	51%	51%
Safe physical setting	43%	41%	44%	45%
Cost of care	34%	27%	32%	51%
Quality of caregivers and teachers	33%	34%	33%	30%
Flexible hours (early morning, night, and weekend care)	33%	32%	30%	39%
Individualized attention provided to each child	29%	29%	34%	21%
Approaches to guidance and discipline of children	27%	34%	20%	25%
Location of child care provider	26%	26%	24%	27%
Accreditation/licensing of child care provider	23%	29%	15%	20%
Opportunities for cognitive development	21%	23%	20%	16%
Program's values and principles	21%	21%	17%	26%
Reviews/reputation of child care provider	20%	14%	29%	20%
Opportunities for social-emotional learning	20%	25%	14%	17%
Diversity of children and teachers	15%	18%	13%	10%
Only arrangement with openings	14%	16%	12%	10%
Caregivers who look and/or sound like my family	13%	12%	18%	8%
Bilingual educational opportunities	12%	13%	14%	7%
Eligible for use with child care subsidy	11%	10%	13%	9%




Parent Compromises

One-third of parents reported they did not make any compromises when selecting their care arrangement in January 2020. However, nearly a quarter compromised on cost of care and flexible hours.



Suburban and rural parents are twice as likely as urban parents to say they did not have to make any compromises when selecting a child care arrangement in January 2020.





Discussion: Considerations for Child Care



Discussion

- Two-thirds of parents cannot afford the cost of high-quality care.
- Faith-based child care is an important component of the child care system for many parents.
- Clear majority of parents are not compromising on their choice of care.
- Very few use—or prefer to use—*non-relative/friend/neighbor care*.
- Vaccines for the child care workforce matter to parents.





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Questions?

Please ask your questions
in the “comment” box





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IDEAS. ACTION. RESULTS.

Understanding Max Diff Analysis

What It Is: A market research technique conventionally used to measure the importance consumers place on a list of items. It forces survey respondents to make tradeoffs between different items on the list and calculates a rank-ordered list of the highest priority items.

Why BPC Used It: BPC was interested in understanding the factors that are most important to parents when choosing a child care provider. A Max Diff analysis enabled BPC to understand not just *which* factors were most important, but *how much* more important certain factors were than others. Each respondent was shown several subsets of a list of 15 factors that may influence a child care decision and was subsequently asked to select the most important and least important factor in each subset. Morning Consult was then able to calculate a utility score for each factor that provides a standard unit by which to compare the importance of each factor.

Interpreting the Results: You can understand the difference between any two attributes by looking at the ratio between their utility scores. In the results on slide 20, “Safety/Cleanliness/Prevention of Illness” has a score of 306 and “Individualized Attention Provided to Each Child” has a score of 111. Thus, when parents selected their most important factor, they were about three times as likely to select the former rather than the latter.

