



Parents and the Changing Nature of Child Care

Highlights from a nationwide survey on parent experiences with child care amidst the coronavirus

April 21, 2020



Background and Overview



Background – Goals

What We Learned in October:

- Parents say it is difficult to find quality care within their budget and make significant changes to their budgets to afford child care
- Finding child care impacts a parent's ability to participate in the workforce
- When looking for care, parents prioritize safety, trustworthiness, quality, and caring and qualified staff

Focus of March/April Survey:

- Impact of COVID-19 on working parents and providers
- Child care needs during COVID-19
- Future implications for the child care industry
- Responsibility of different players in stabilizing the child care industry



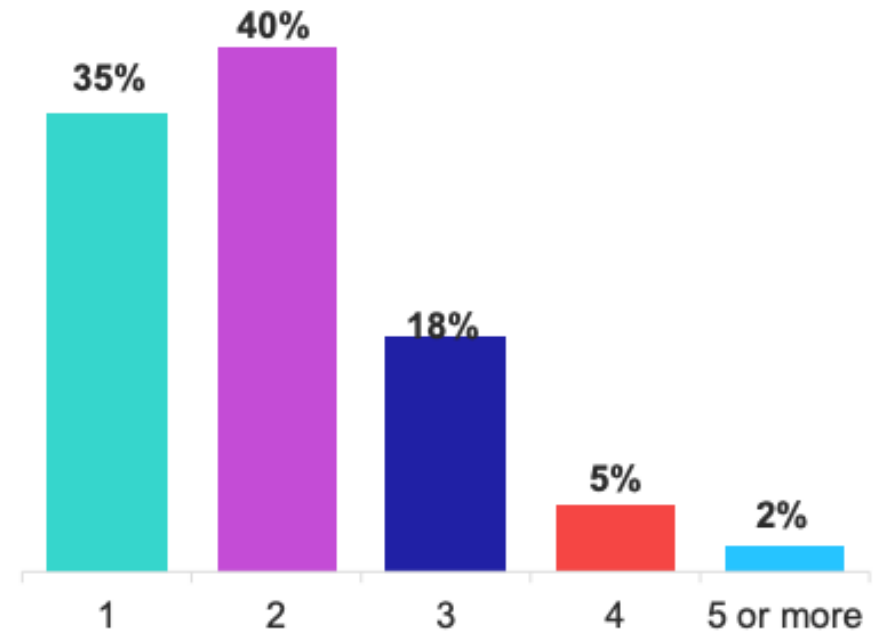
Background – Methodology

Methodology: Conducted from March 31 – April 4, among a national sample of 800 parents who:

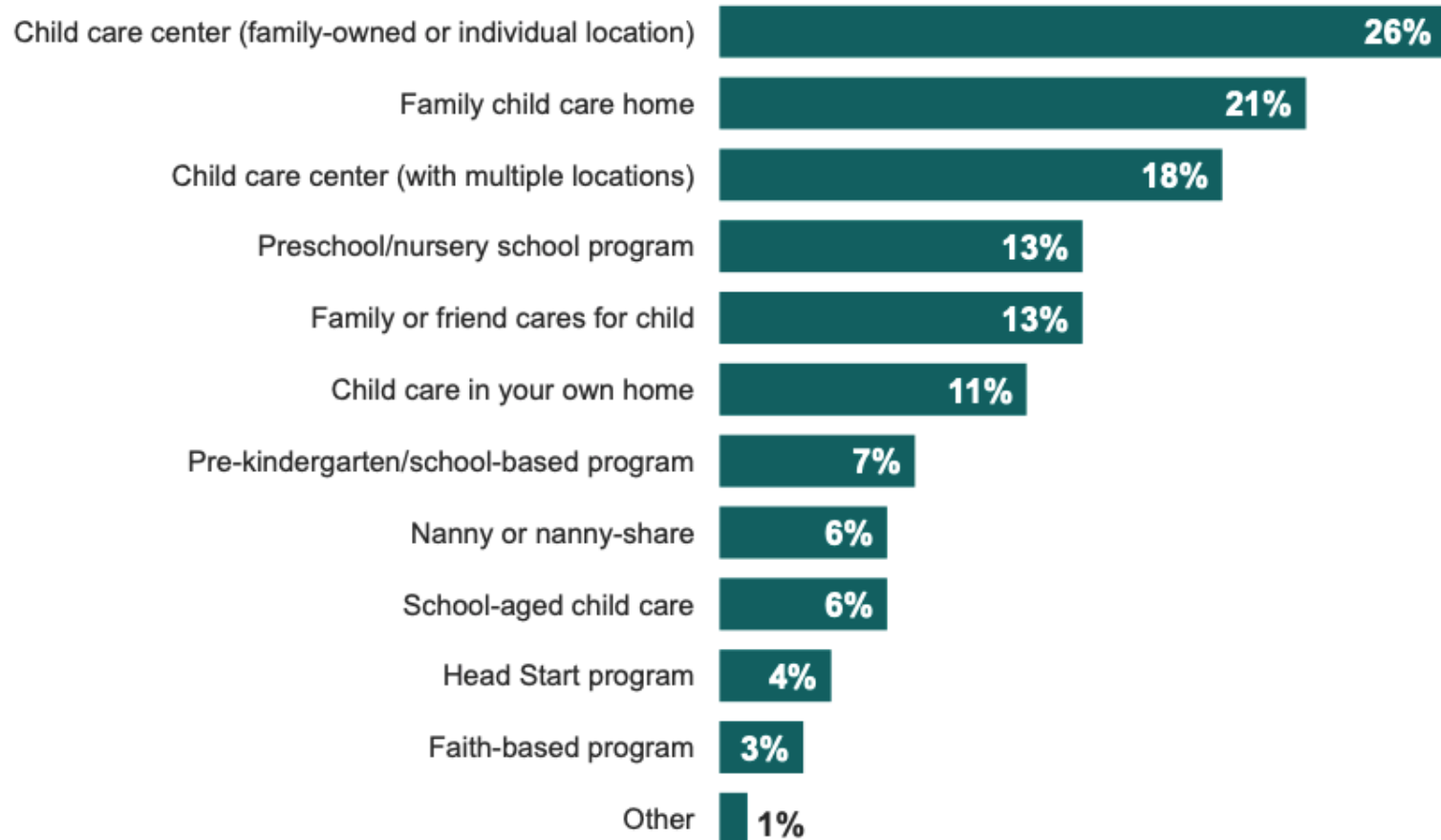
- Have children under the age of 5 at home
- Paid for child care within the last three months
- Were employed in the last three months, but whose situations may have changed recently as direct result of COVID-19

Essential Workers: About 20% of respondents were classified as essential - those who work in the grocery, defense, health care, public administration, public health and safety, pharmacy, and transportation industries

Children at Home Under 18



Pre-COVID Use of Child Care



Key Findings, October vs. April

What's changed in responses?

- Parents' work situations
- Child care availability
- Ability to find child care within budget

What hasn't changed?

- Parents need child care
- Many parents continue to pay for child care
- Parents stress the importance of safety and trust in child care arrangements

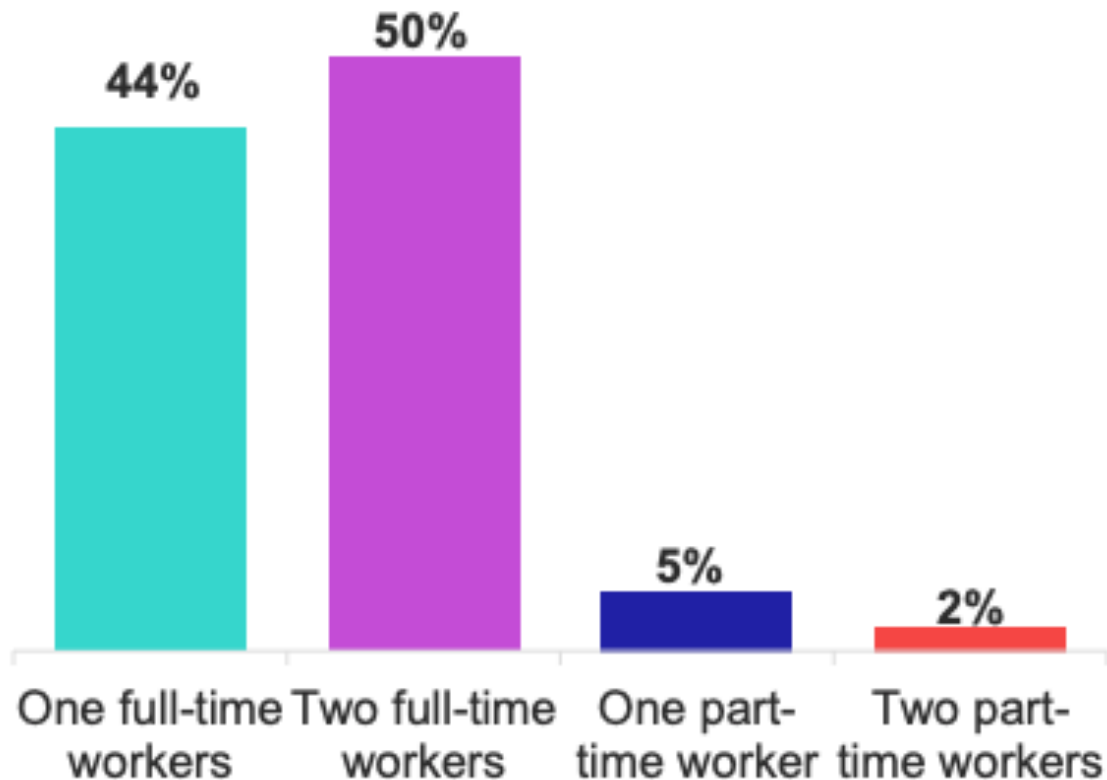


Impact of COVID-19 on Work



Employment Status

Status 3 Months Ago



Current Work Status

Someone in the household is currently:

Working Remotely: 56%

Working Less Hours: 20%

Furloughed or Laid Off: 19%

No Change: 14%

*parents could choose all that applied



Demographics of Changing Work

- Men are more likely than women to be working remotely (50% vs 40%)
- Those with higher incomes (<\$100k) are much more likely to be working from home than those with lower incomes (>\$50k) (57% vs 25%)
- As are those with a bachelor's (55%) or graduate degree (64%) compared to those with less than a college degree (25%)
- Almost a quarter of parents with lower incomes (24%) said they had been laid off or furloughed recently, compared to just 6% of those with higher incomes



Child Care Needs During COVID-19



Need for Child Care

**Just 7% of parents
said they are
still using their previous
child care arrangement**

- Around half of households (54%) say they, a family member, or friend can care for their child(ren) at the moment
- 39% of households said they still need formal child care during COVID-19



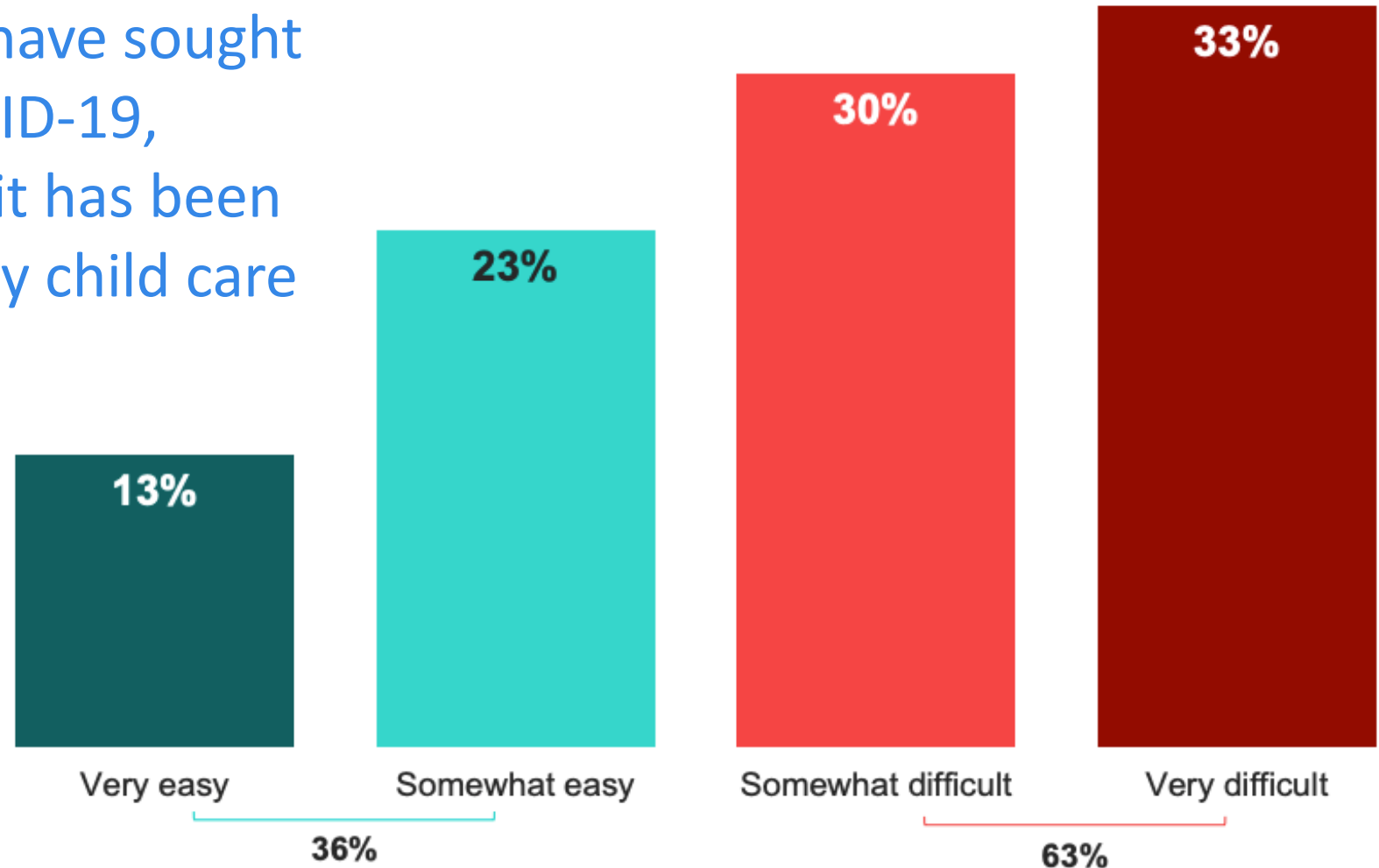
Essential Workers Have Greater Need

- Among parents still working in person, the percent who need child care during the work day is double that of parents who are working remotely (31% vs. 15%)
- Parents still working in-person are less likely to have someone in their household who can care for their children than parents working remotely (32% vs 42%)



Difficulty Finding Care

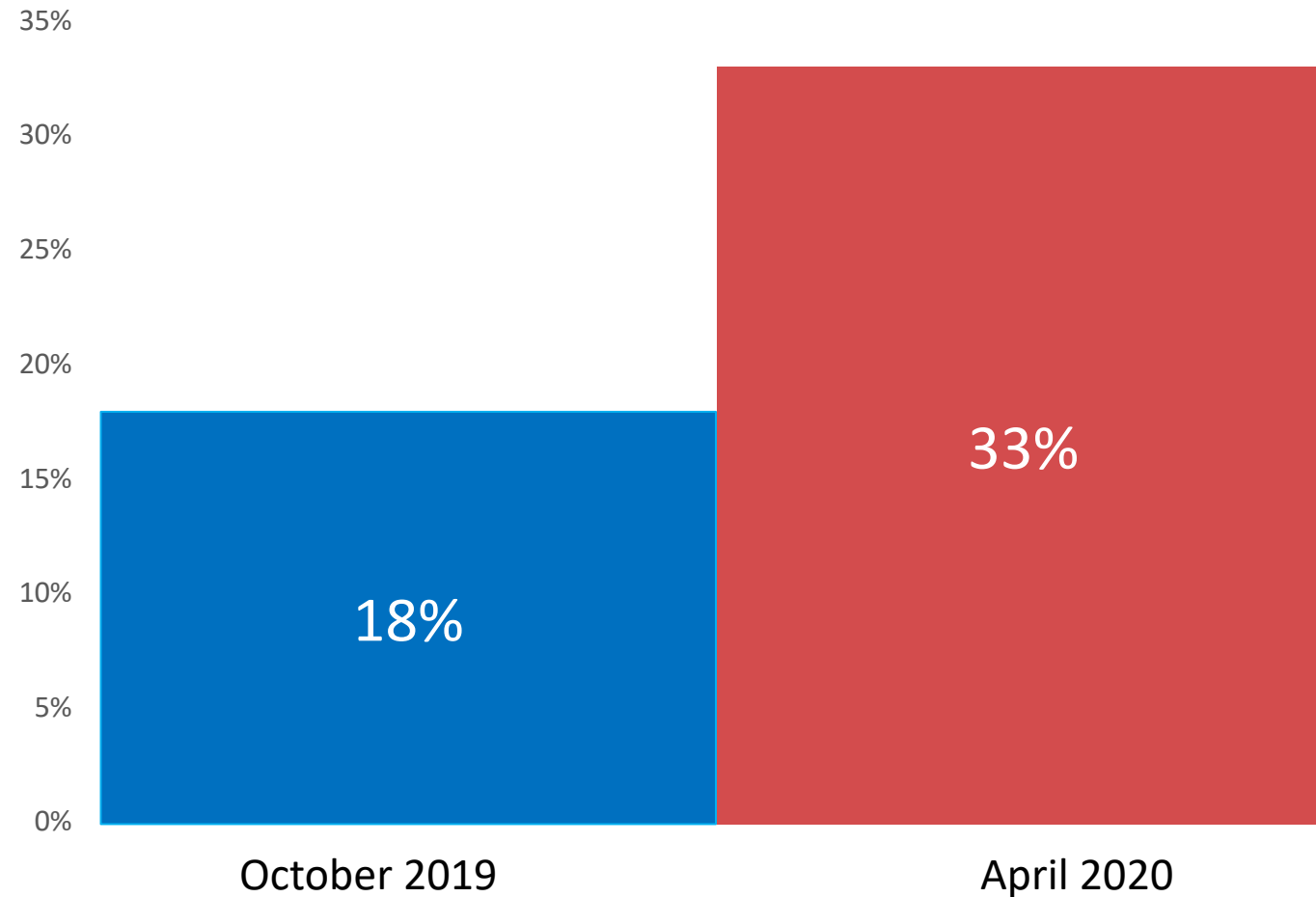
Among parents who have sought child care during COVID-19, **two thirds (63%)** say it has been **difficult to find** quality child care within their budget



Finding Care More Difficult

The percent of parents who found it “**very difficult**” to find child care nearly doubled over the last 6 months, from our previous survey

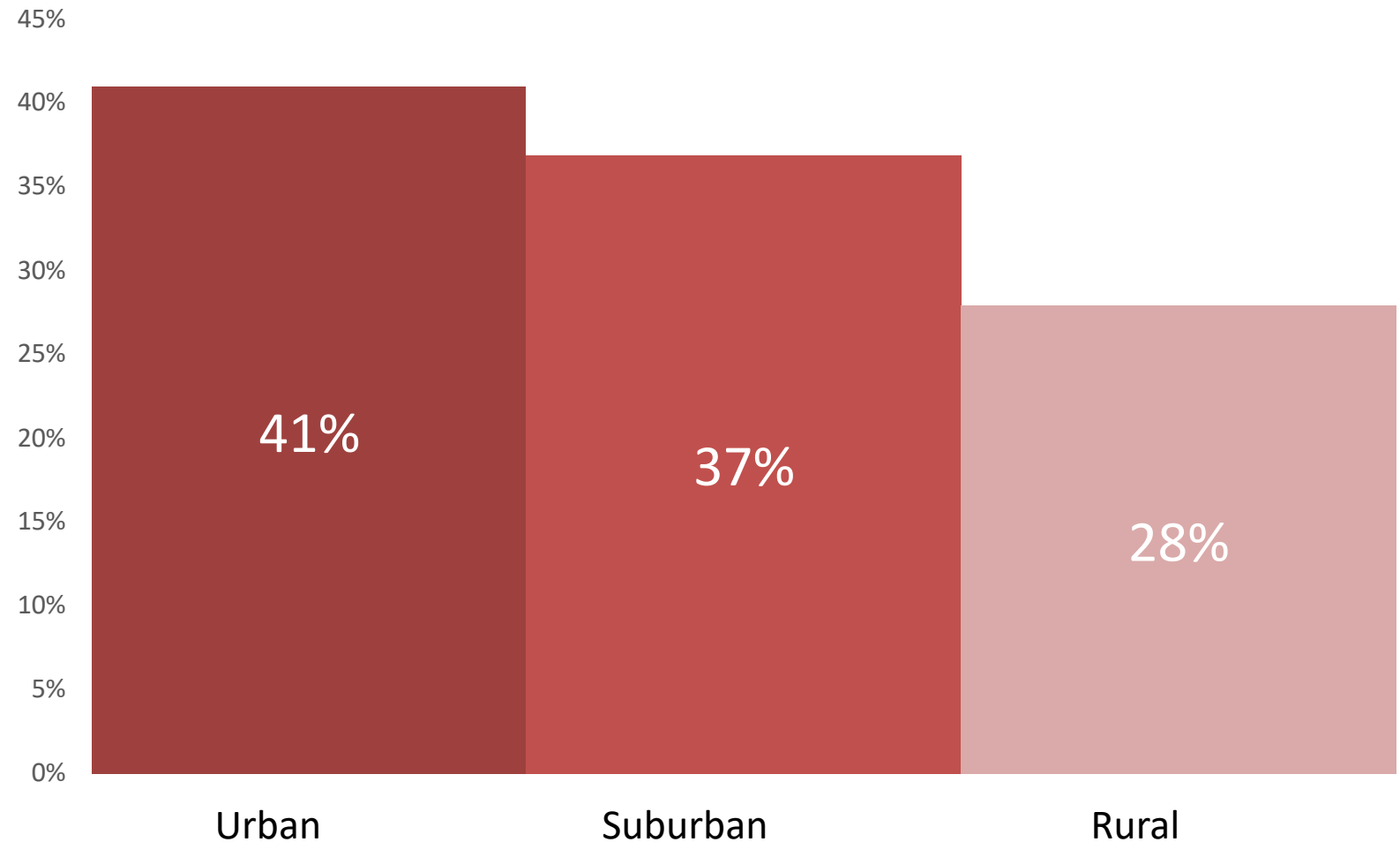
Parents who find it “very difficult” to find child care



Search is Different Across Communities

Urban and suburban parents are more likely than rural parents to say it has been difficult to find quality child care within their budget during COVID-19

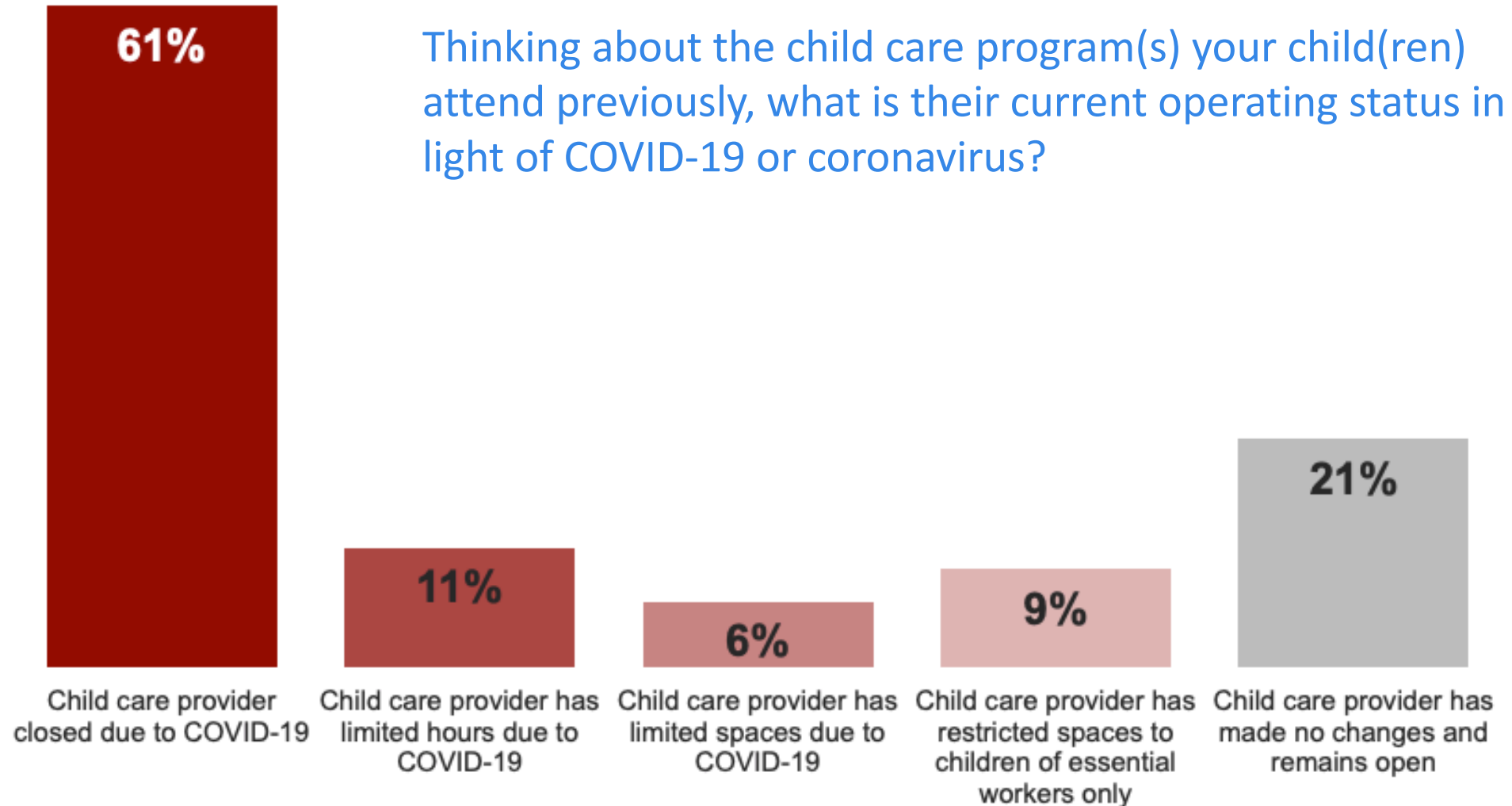
Parents who find it “difficult” to find child care



Impact of COVID-19 on Child Care Providers



Most Parents Impacted by Program Closures



Certain Programs Remain Open

Of formal child care programs, **home-based providers** are most likely to remain open than others:



28%

of family child care homes



16%

of individually owned child care centers



10%

of child care centers with multiple locations



Programs are Losing Income

Nearly 60% of parents are **no longer paying** tuition to their child care provider if they have closed

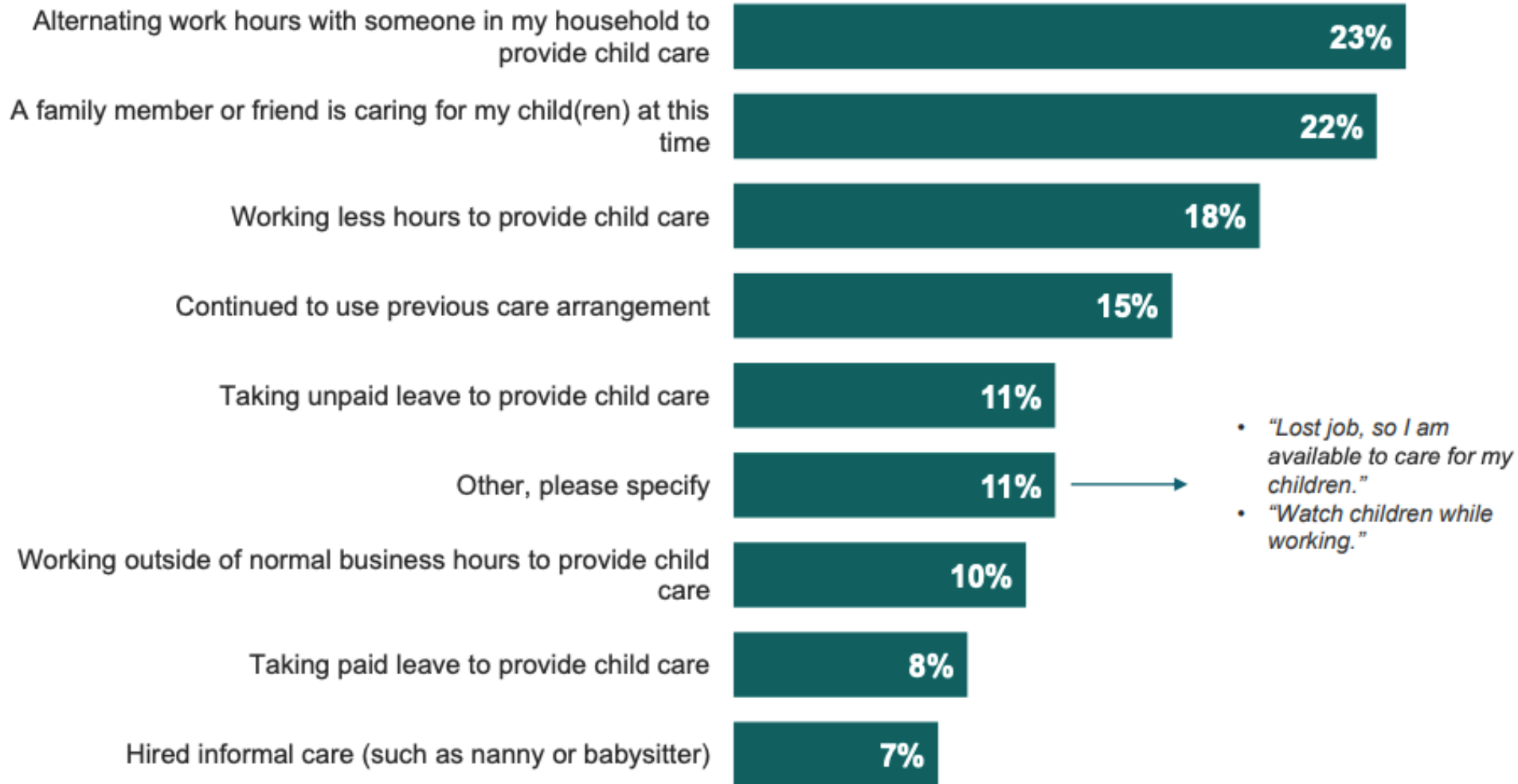
- Two in five are paying either partial or full amounts to their closed provider
- Parents are most likely to still be paying their home-based provider than any other program type
- Of parents who are still paying, a fifth are required to in order to keep their slot



Impact of COVID-19 on Parents Lifestyles



Parents' Lifestyle Changes



Essential Workers Face More Challenges

- Just 22% of essential workers continue to use their previous arrangement
- Parents working remotely are much more likely to be alternating work schedules with someone in their household than essential workers to care for their child(ren) (35% vs 16%)
- Parents working remotely are much more likely to work outside of normal business hours to care for their child(ren) than those working in-person (20% vs 6%)

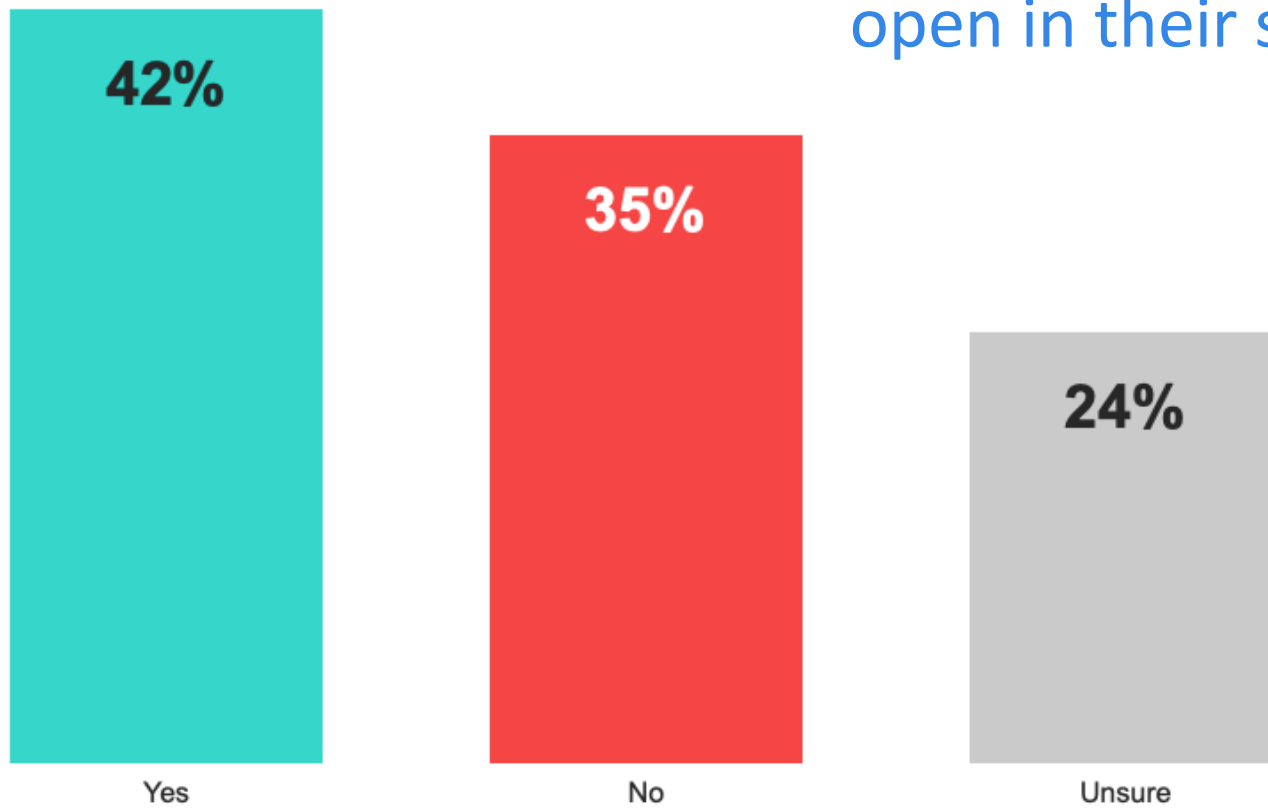


Implications for the Child Care Industry



Is Child Care Essential?

A slight plurality of parents believe child care is an essential service that should remain open in their state



Half of men (48%) think child care is essential; 11 points higher than women

Those currently working in-person are more likely than those working remotely to agree child care is essential (49% vs 40%)



Views on State Child Care Plans

- Most parents said they were aware of their state's plan for child care operations (77%)
- Of parents who knew about their state plan, the vast majority (82%) were supportive of the decision for child care operations
- Lower income parents were less likely to be aware of, and to agree with, their state's plan for child care operations



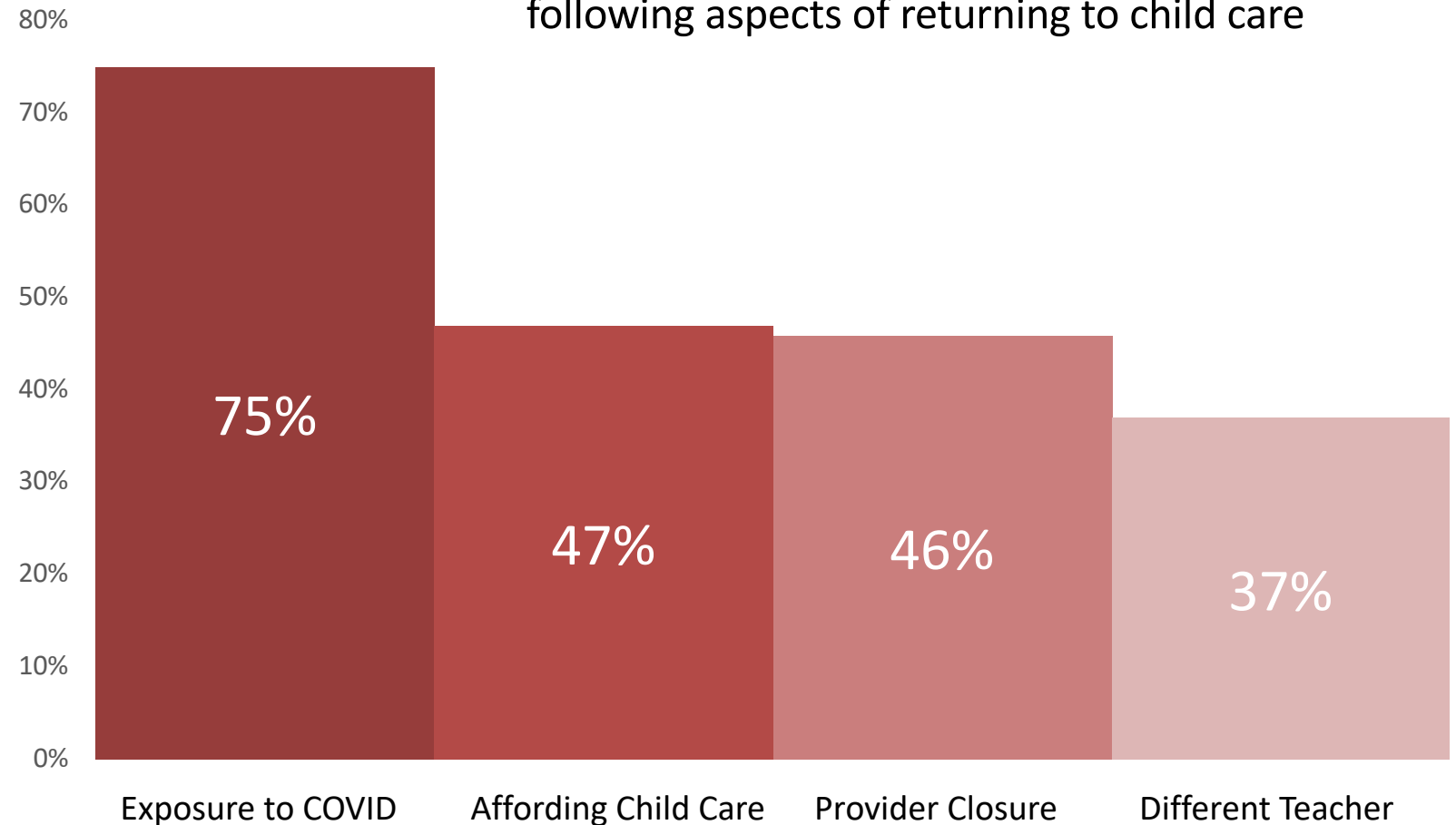
Looking Ahead: How to Re-Open Child Care



Parent's Concerns about Returning to Child Care

When thinking about returning to child care, parents have a variety of concerns about safety, affordability, and choice

Parents who are somewhat or very concerned about the following aspects of returning to child care

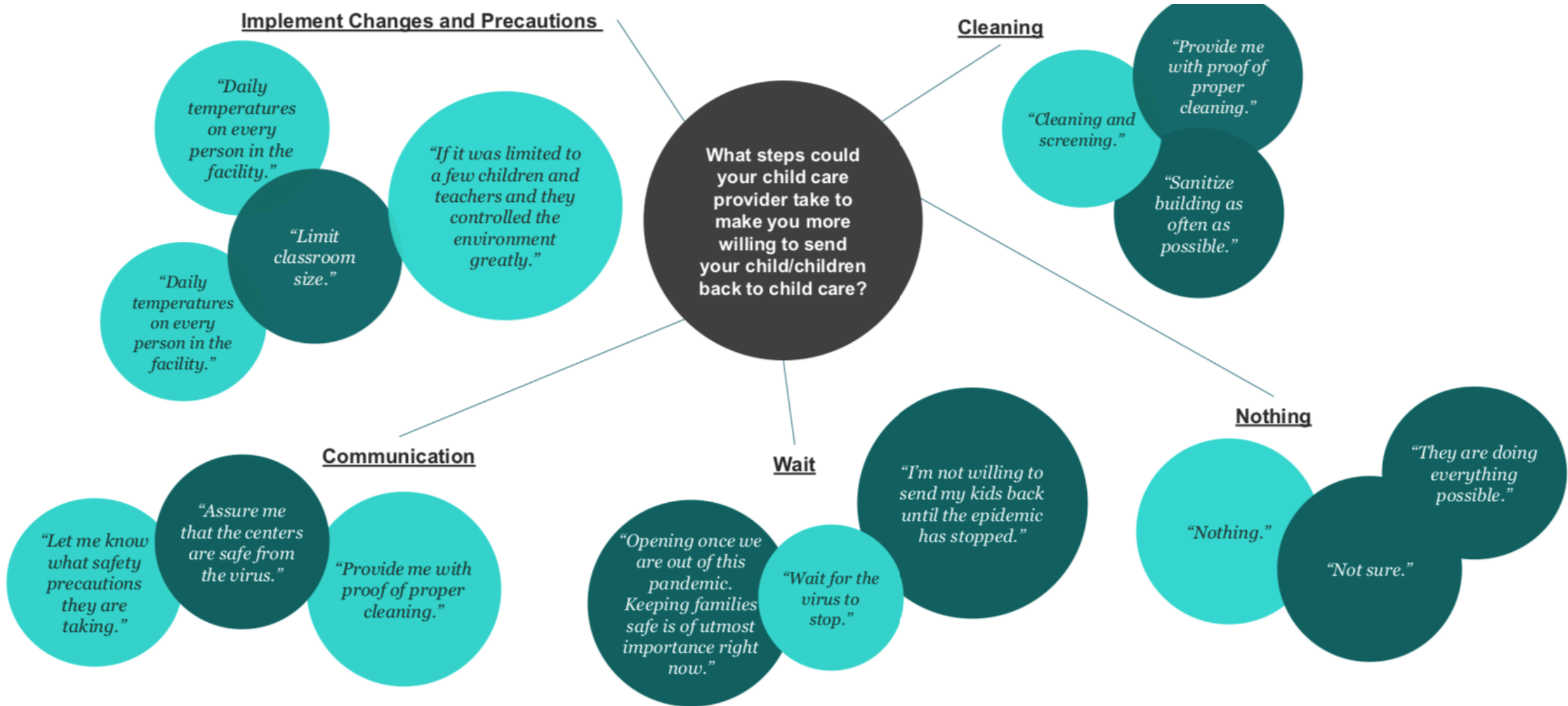


Concerns – Availability and Affordability

- Urban parents (54%) are more concerned than suburban (44%) and rural parents (37%) that their current child care provider will not be open
- When thinking about the impact on the household if the provider were not open, parents were worried about their **finances**, ability to **find a job** and **keep their job**, their child's social and emotional **development**, and finding another program **that fit their needs**
- Lower income parents are especially concerned about not being able to afford child care (58% vs 34%)



Providers Could Mitigate Concerns

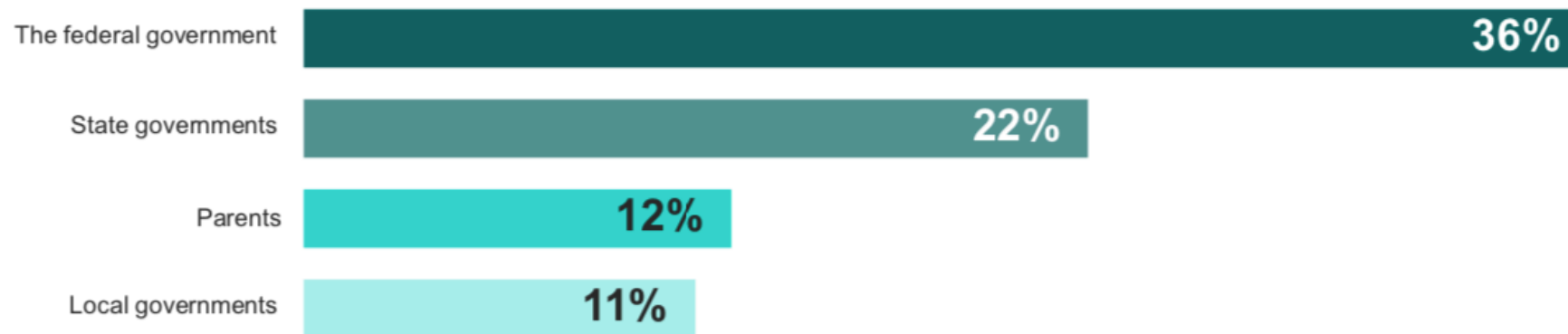


Financing and Support for Child Care



Supporting the Child Care Market

- One-third of parents think the federal government is the most responsible for financially supporting the child care market



- Republicans are split on whether the federal or state government is most responsible (28% vs 24%)
- Democrats clearly think the federal government is most responsible (40%)



Supporting Child Care for Essential Workers

- Parents are split whether the federal government or parents are most responsible for paying for child care of essential workers



- Democrats are more likely to believe the federal government is most responsible, and Republicans more likely to believe parents are



Discussion: Implications for Child Care





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Questions?

Please ask your questions
in the “comment” box





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