



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/>



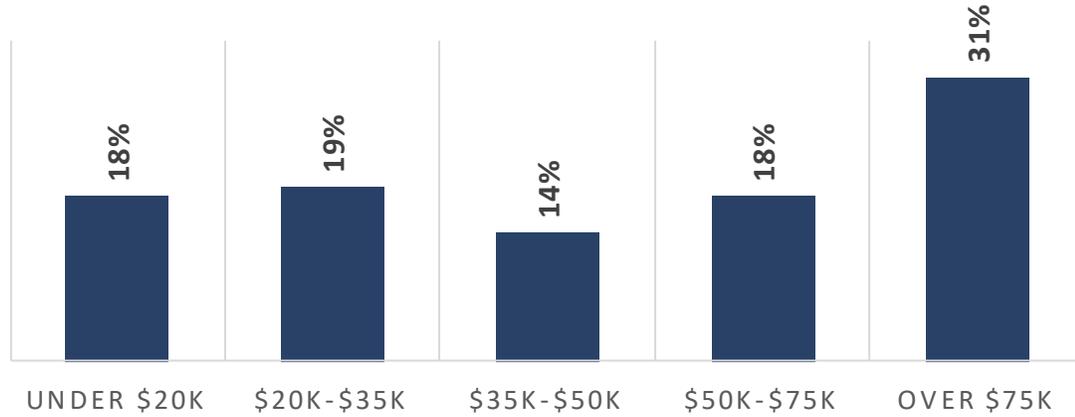
Methodology

- 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.

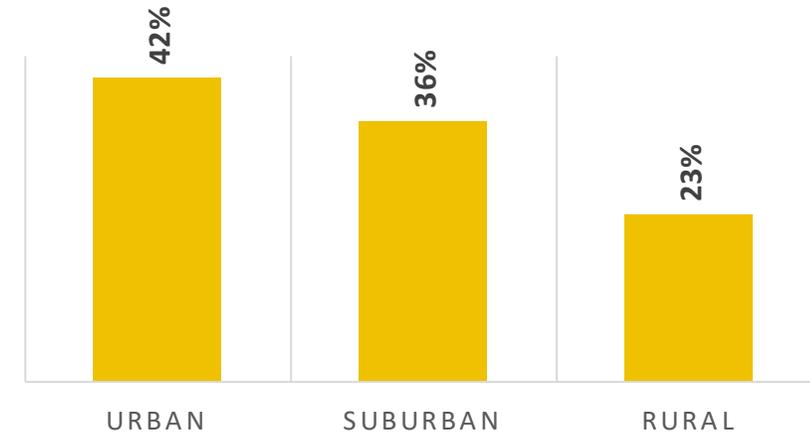


Respondent Profile

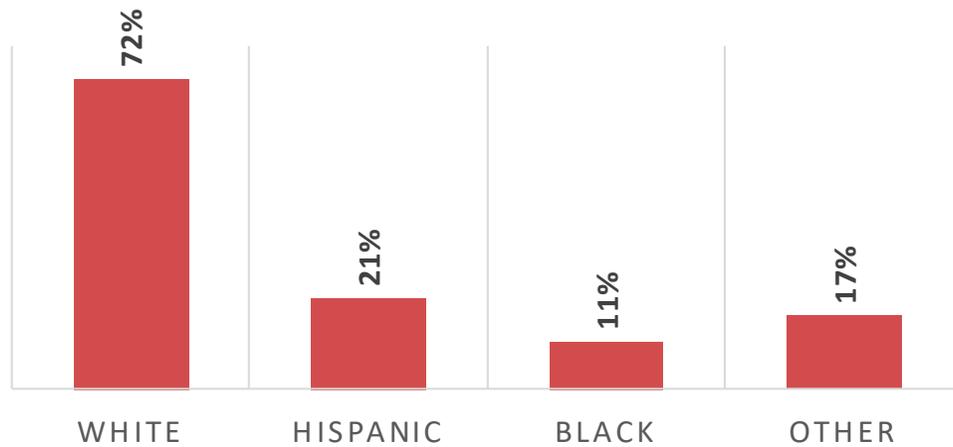
HOUSEHOLD INCOME



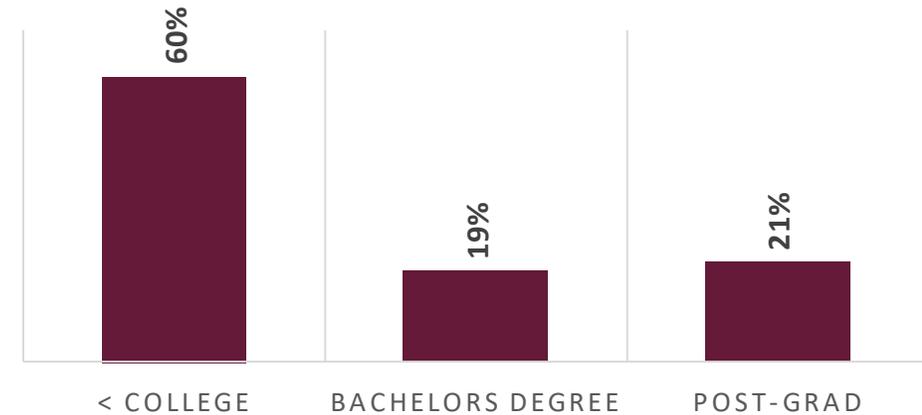
COMMUNITY TYPE



ETHNICITY

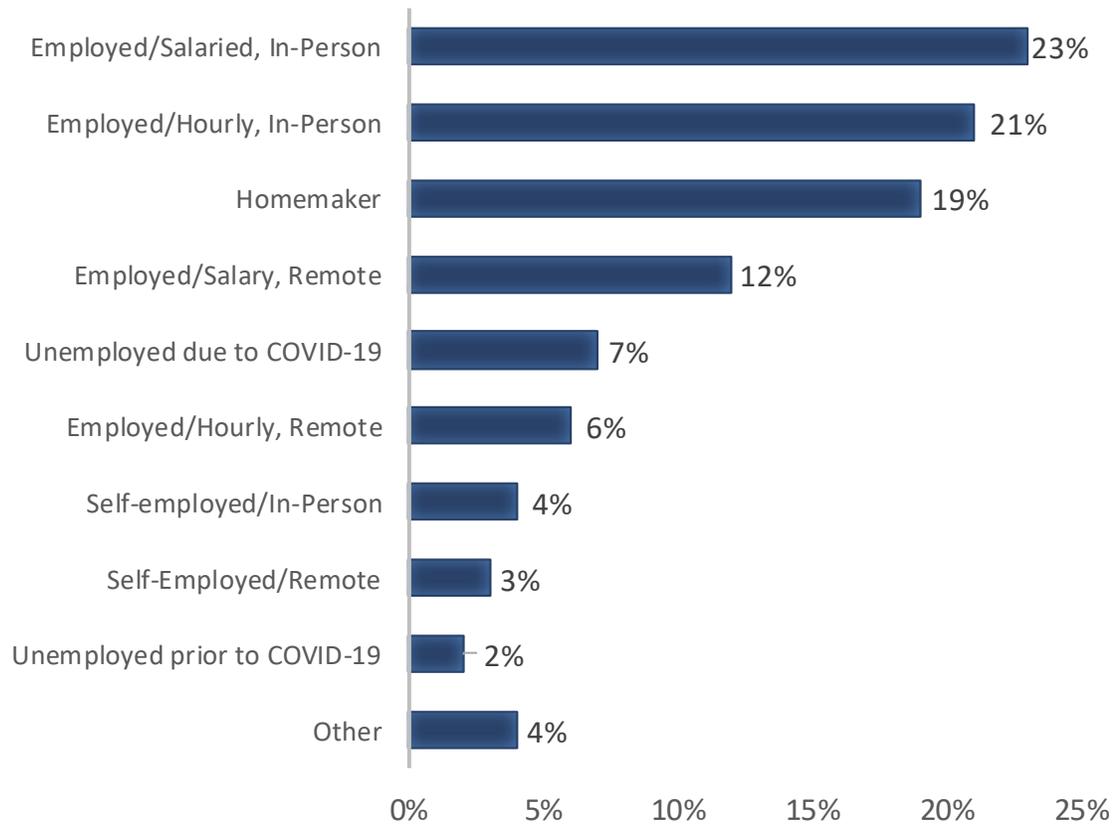


EDUCATION



Employment Demographics

EMPLOYMENT STATUS (DECEMBER 2020)



ESSENTIAL WORKERS

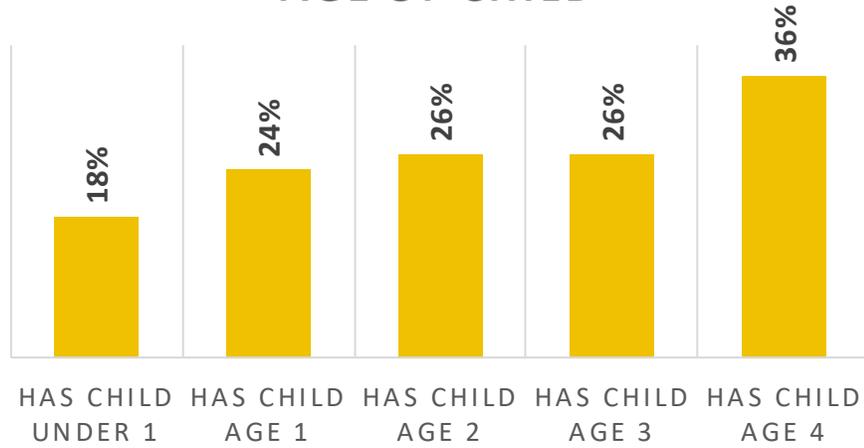


Among all survey respondents, 69% are in households with a single parent or two working parents.

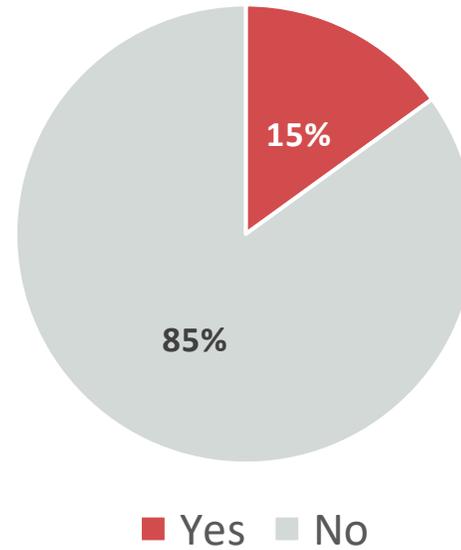


Family Demographics

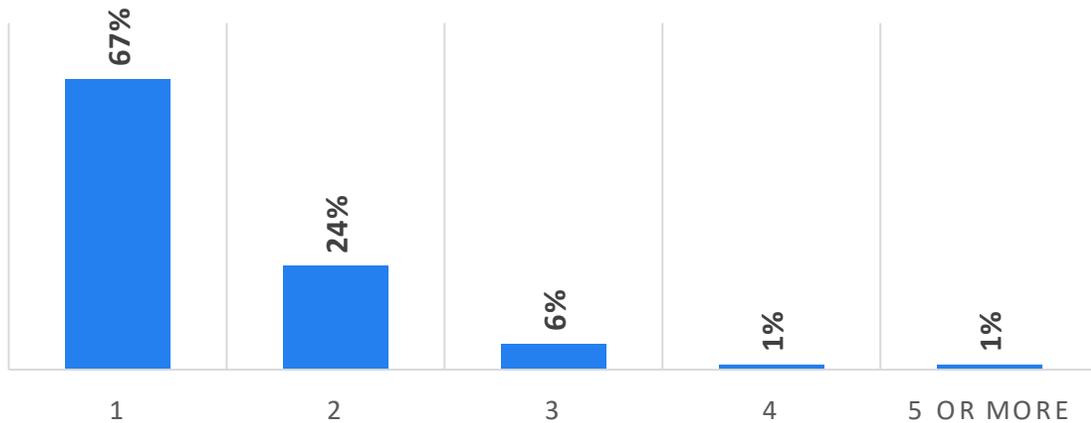
AGE OF CHILD



GRANDPARENT IN THE HOUSEHOLD



NUMBER OF CHILDREN UNDER AGE 5

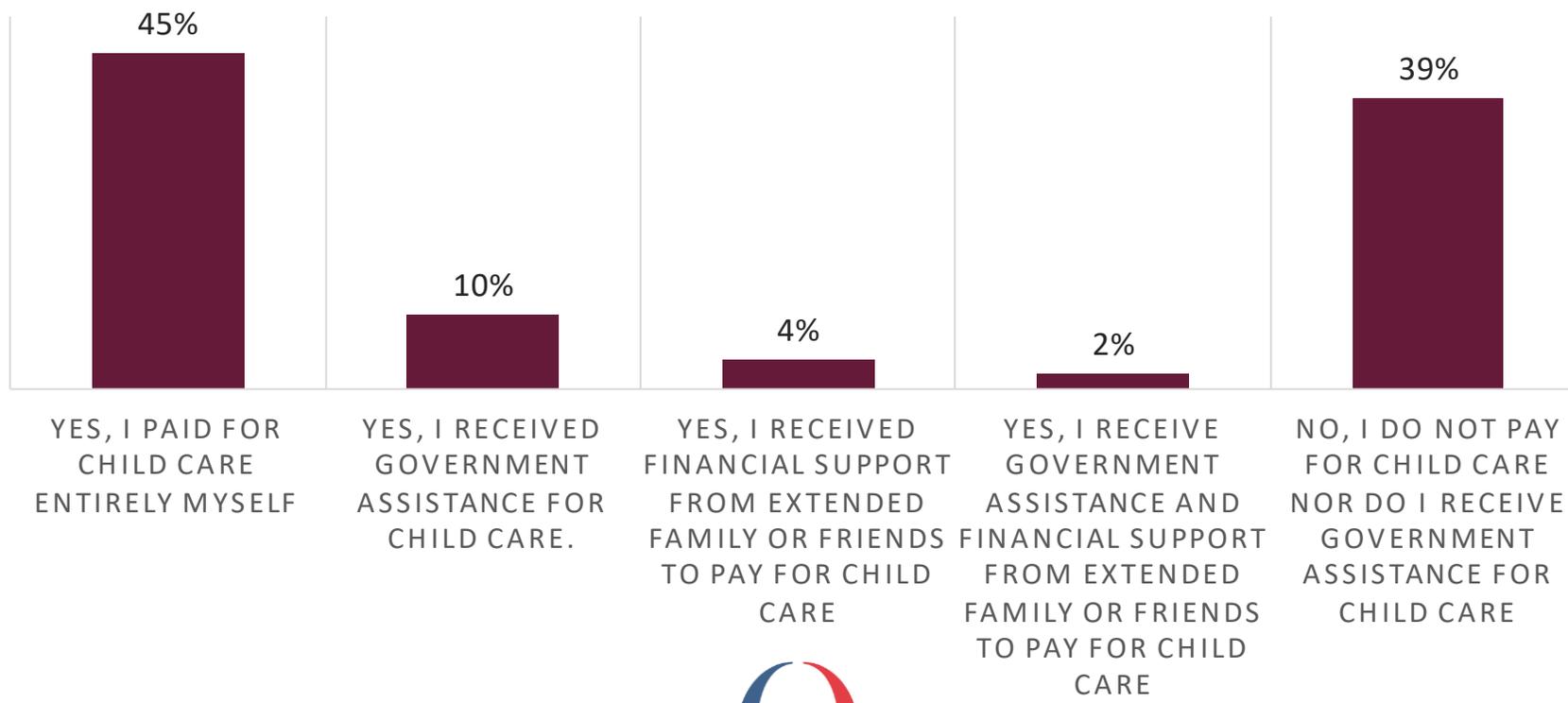


Paying for Child Care

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

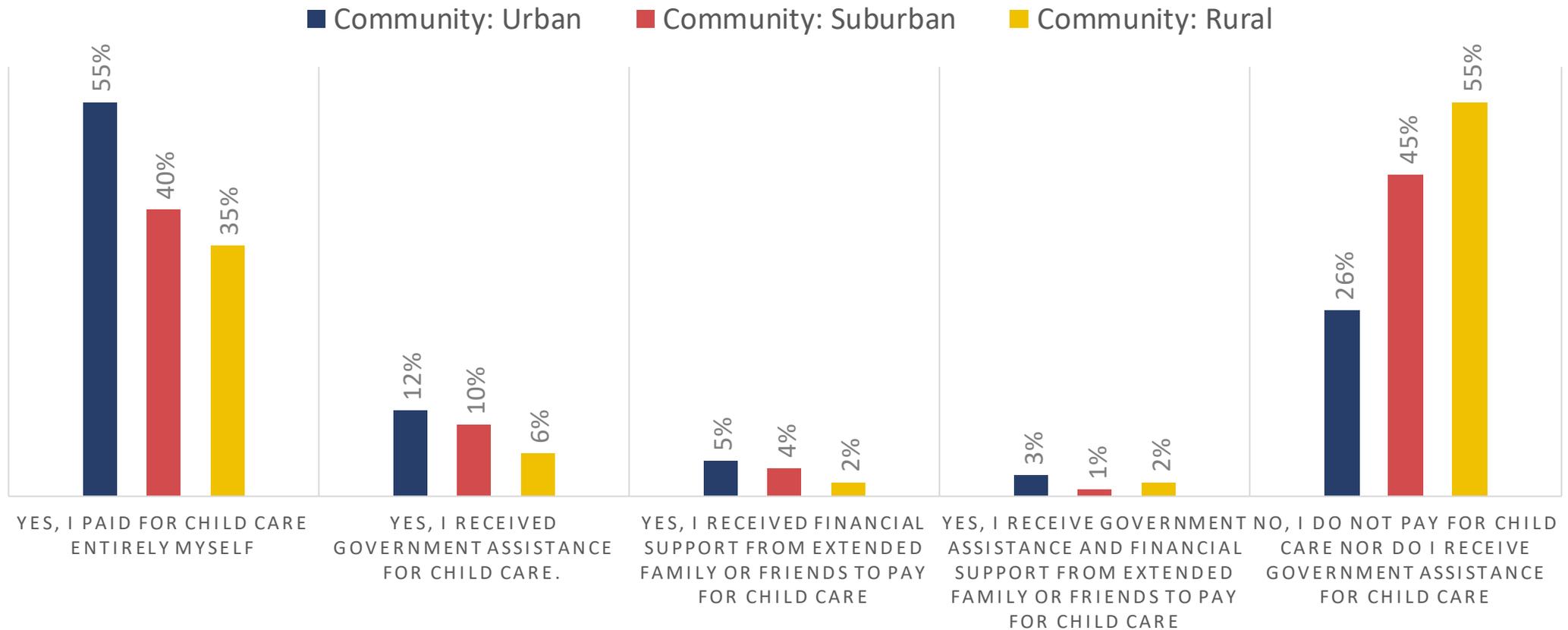
Of the households with a single parent or two working parents:

- 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/>

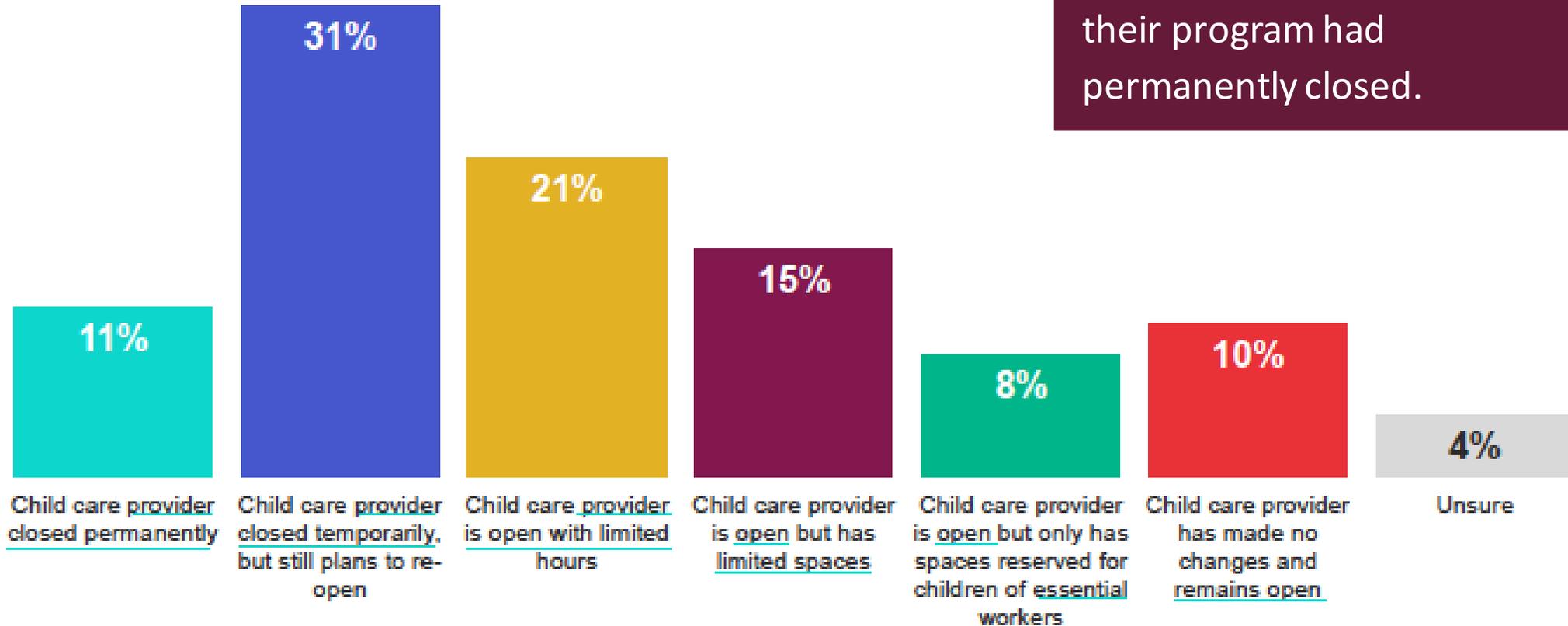


Overview of Key Findings



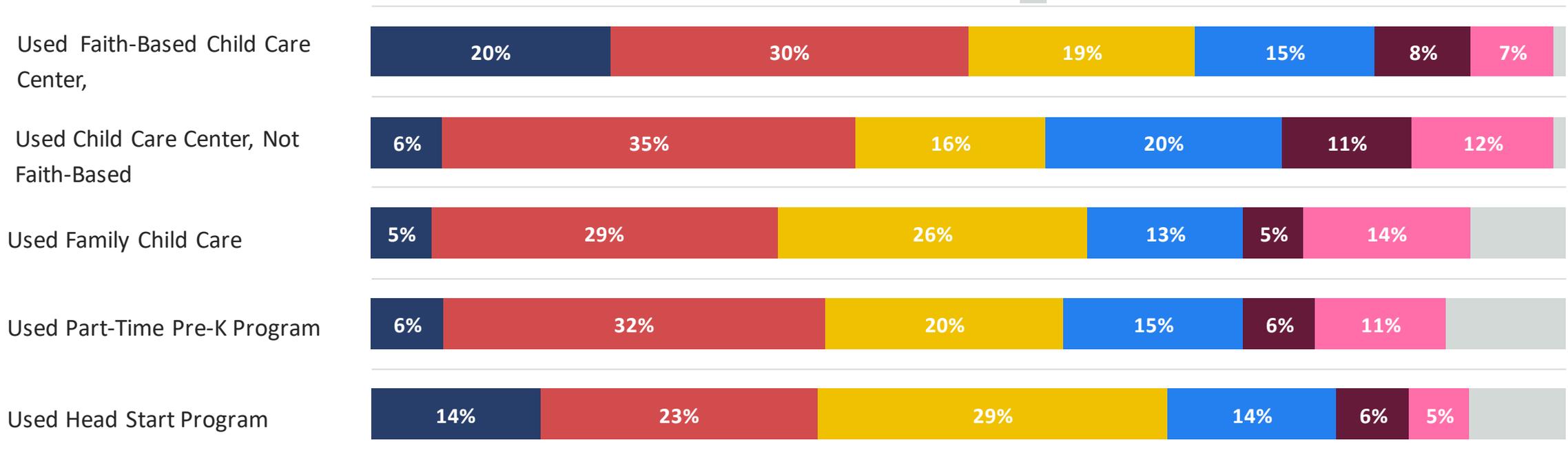
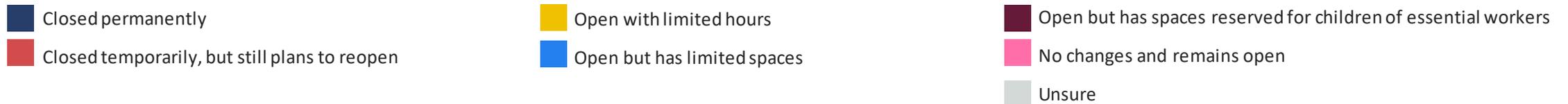
Current Operating Status as of December 2020

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

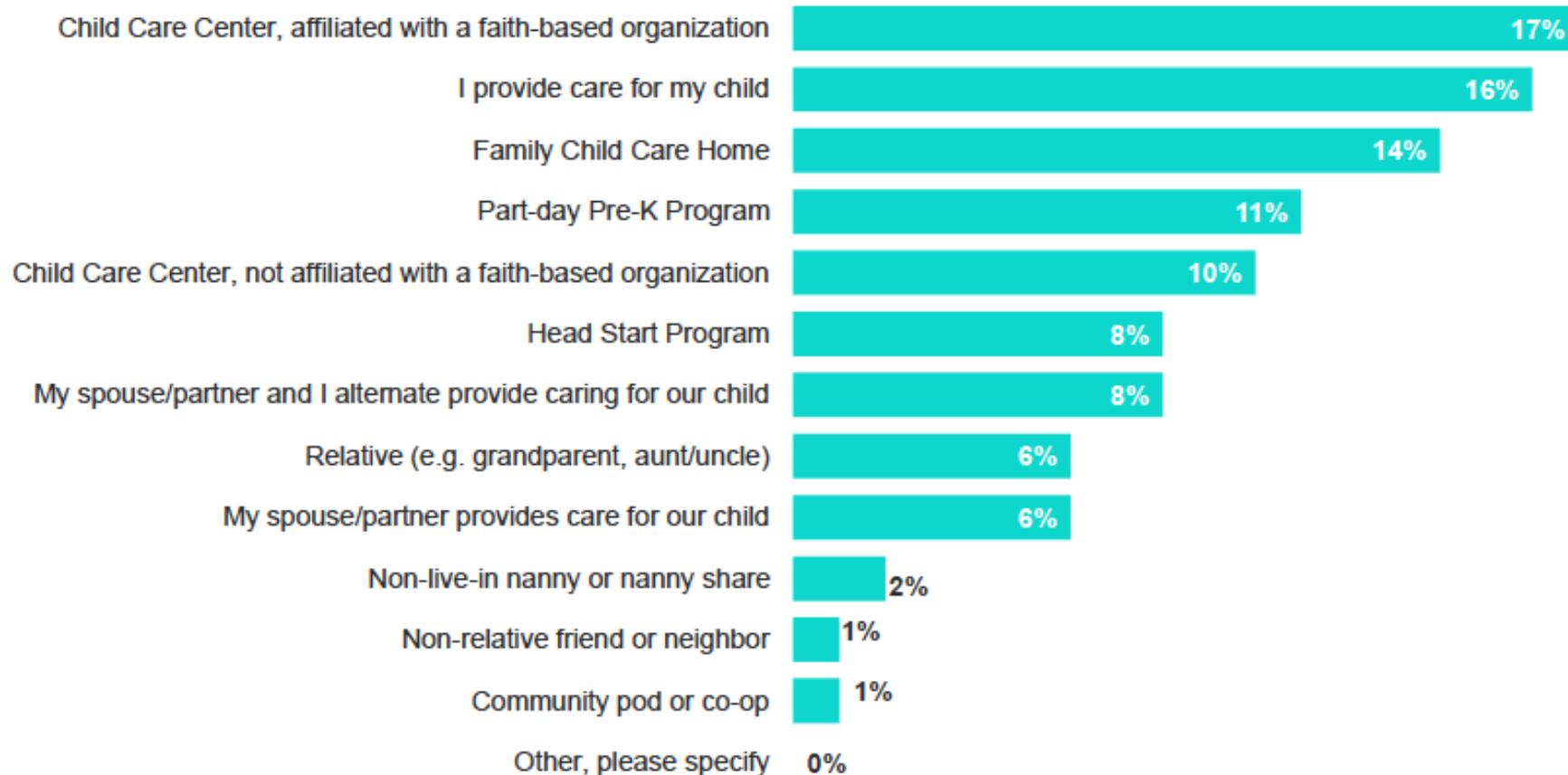
- Prioritizing vaccines for child care workers would significantly change parent child care decisions during the pandemic.
- This is particularly important to male respondents, parents with higher levels of education and income, and parents in urban communities.

| Child Care Choices Differ Based on Who Receives the Vaccine | |
|--|------------|
| Will consider a different child care arrangement due to a vaccine | 52% |
| 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% |



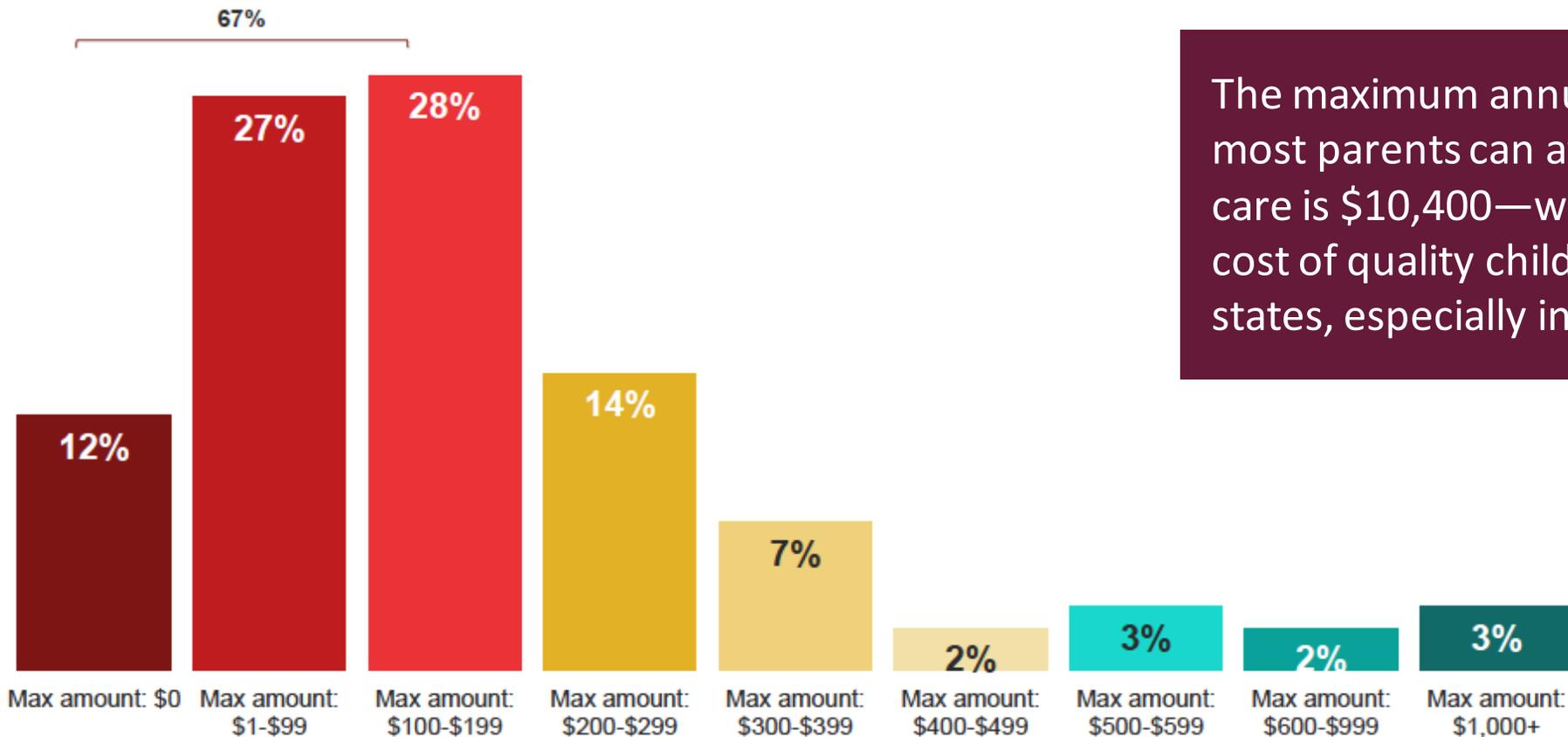
Implications of Vaccine Availability

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.

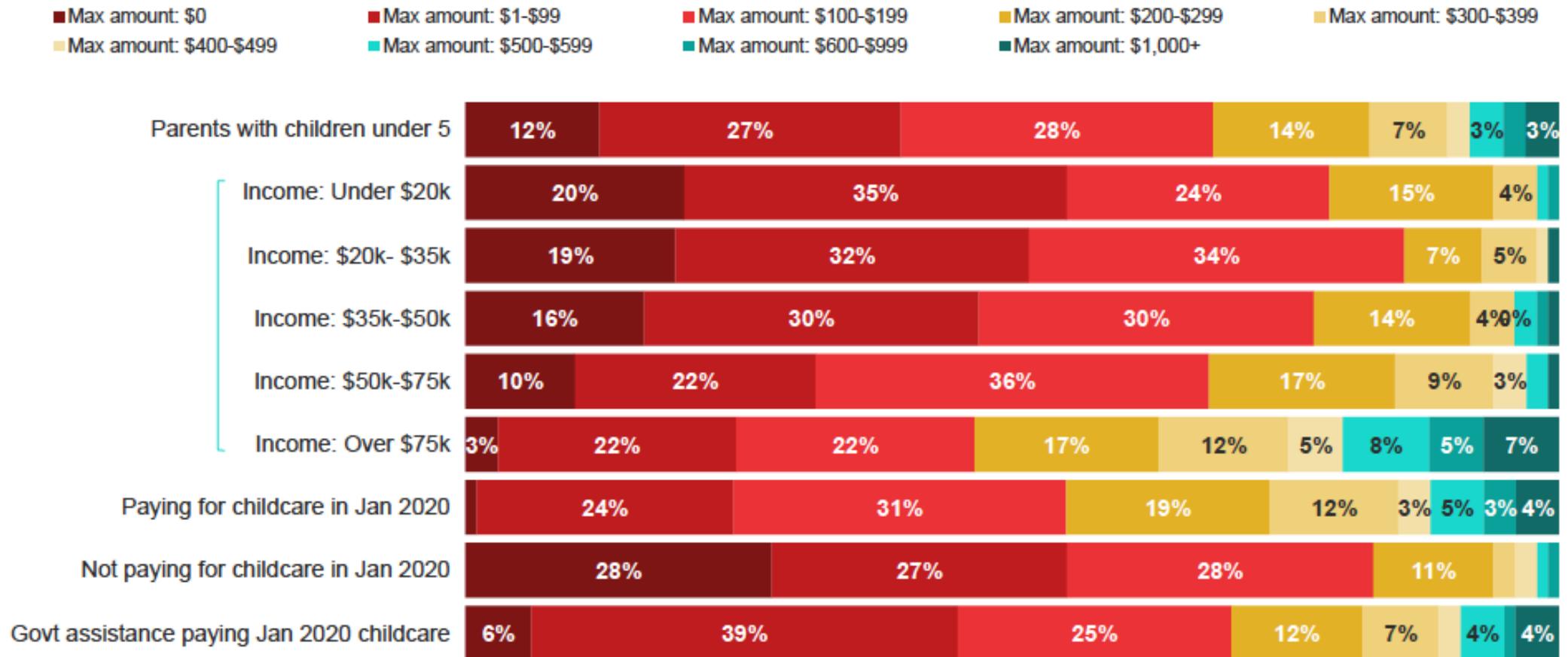


The maximum annual amount most parents can afford for child care is \$10,400—well below the cost of quality child care in many states, especially infant care.



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.

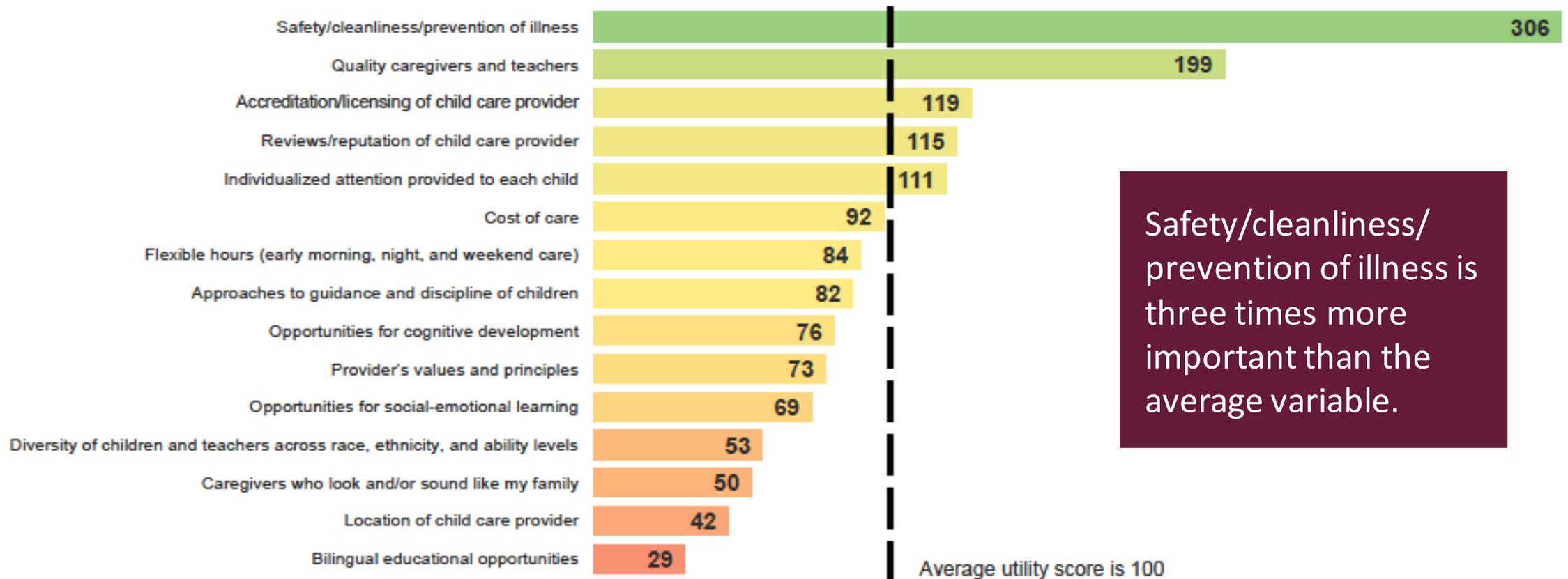
Parents considered 15 factors:

- 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.



Safety/cleanliness/
prevention of illness is
three times more
important than the
average variable.



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 |
|---|---------|------------------|---------------------|------------------|
| 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 | |
|---|---|------------------|---------------------|------------------------|-----|
| Average utility score | 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.



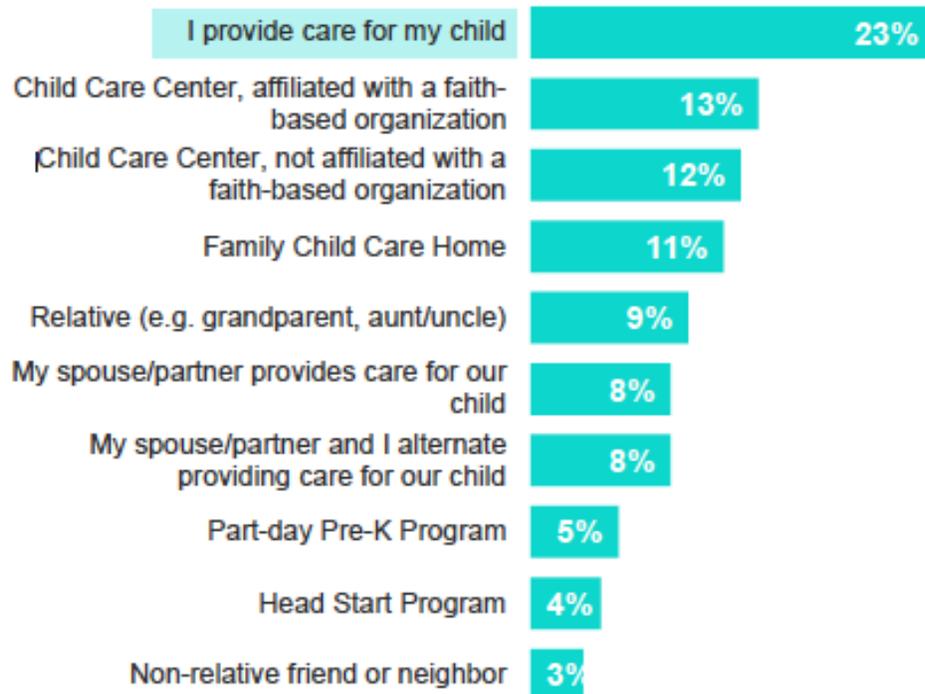
Child Care Arrangements During COVID-19



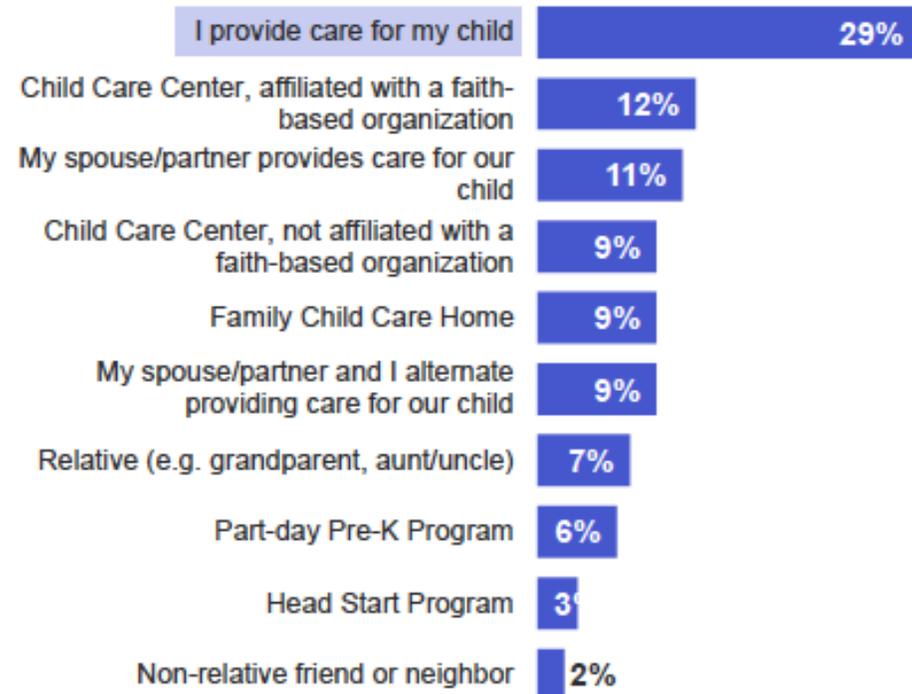
Child Care Arrangements During COVID-19

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?



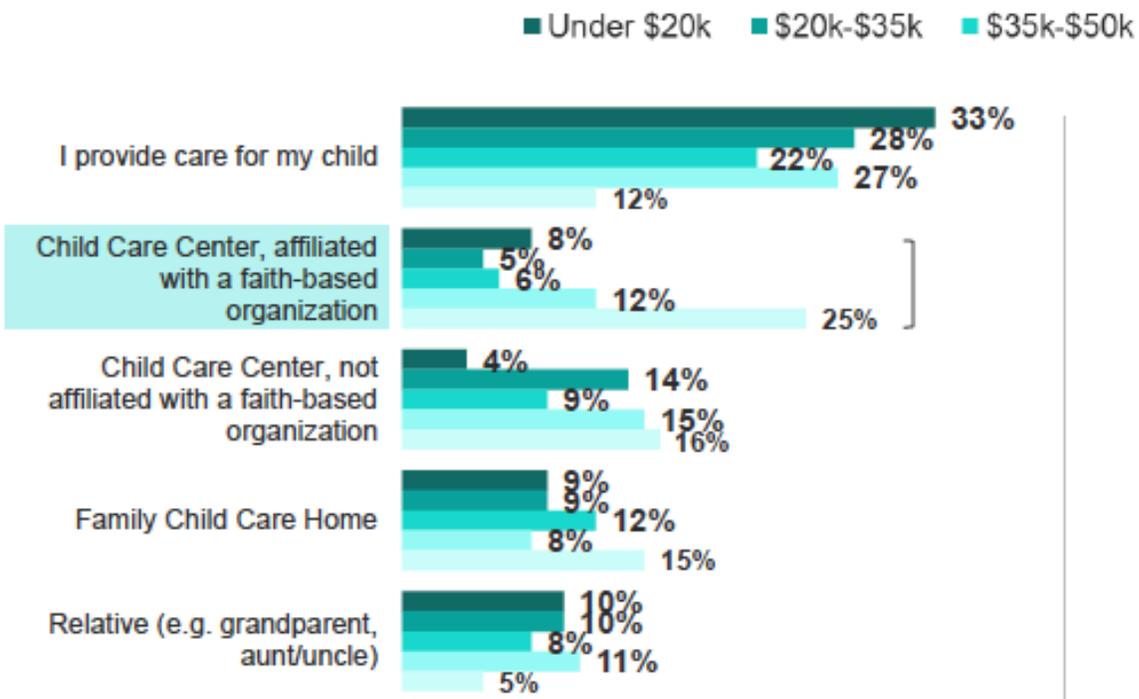
Which of the following best describe the **current primary** child care arrangement for your youngest child?



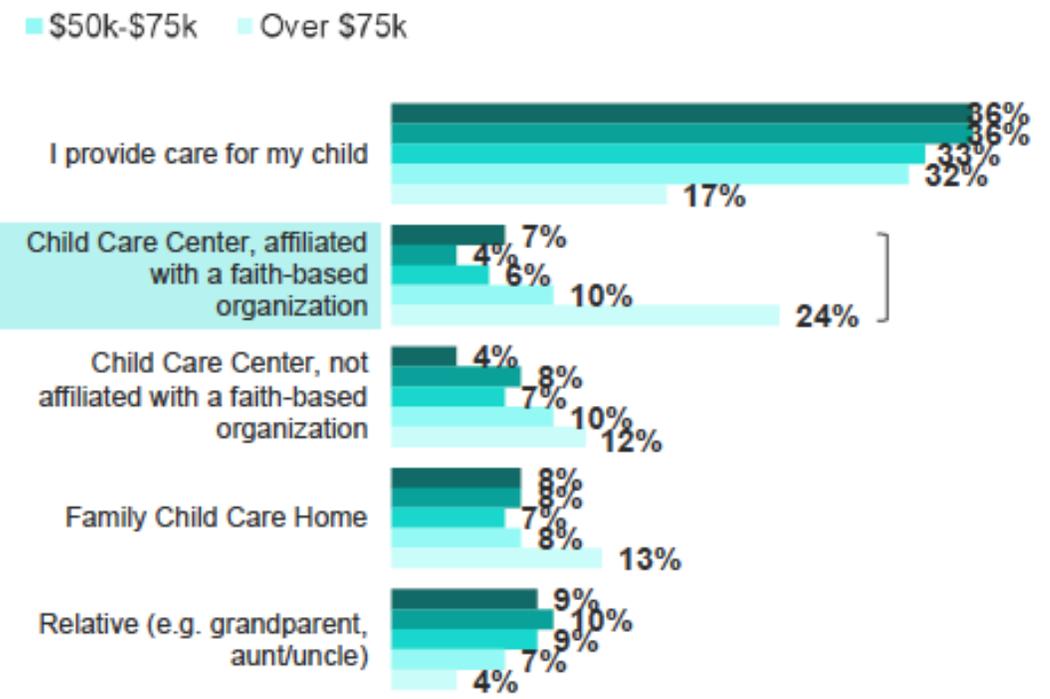
Child Care Arrangements During COVID-19

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?



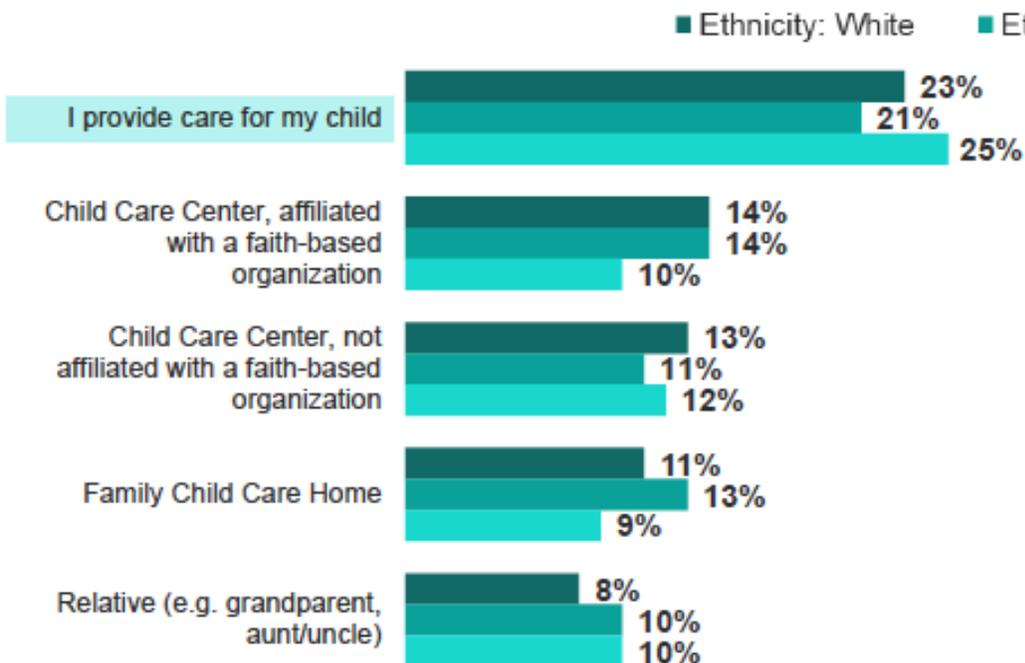
Which of the following best describe the **current primary** child care arrangement for your youngest child?



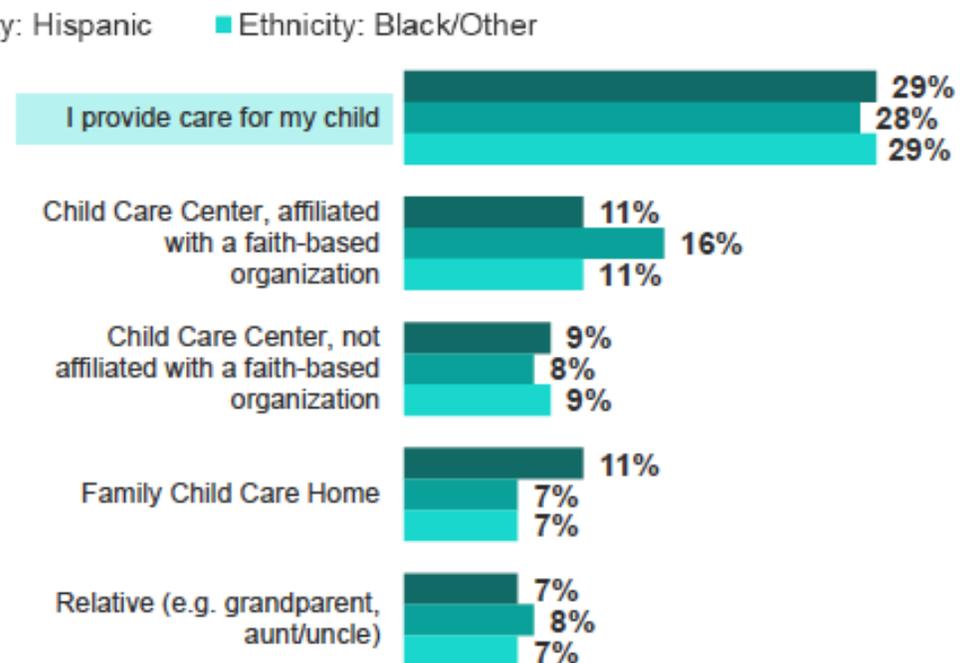
Child Care Arrangements During COVID-19

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?



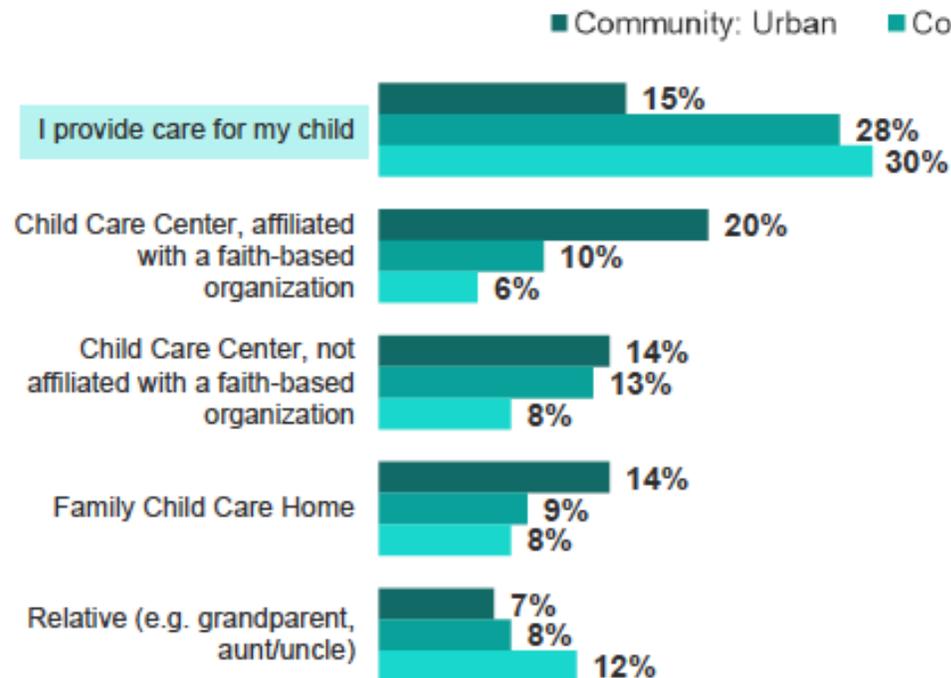
Which of the following best describe the **current primary** child care arrangement for your youngest child?



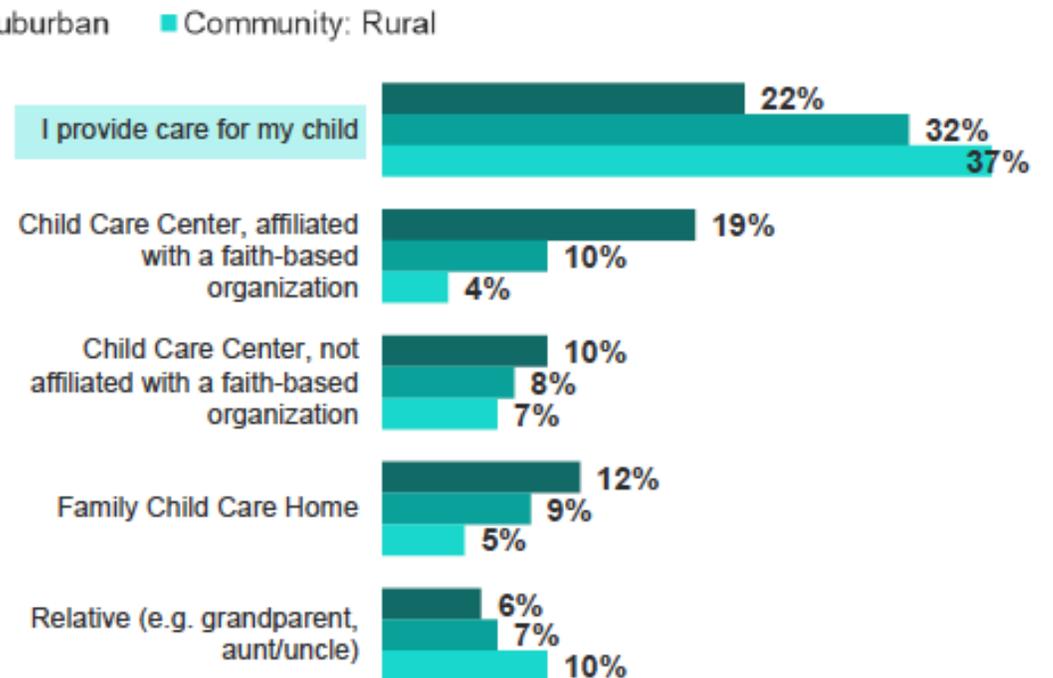
Child Care Arrangements During COVID-19

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?



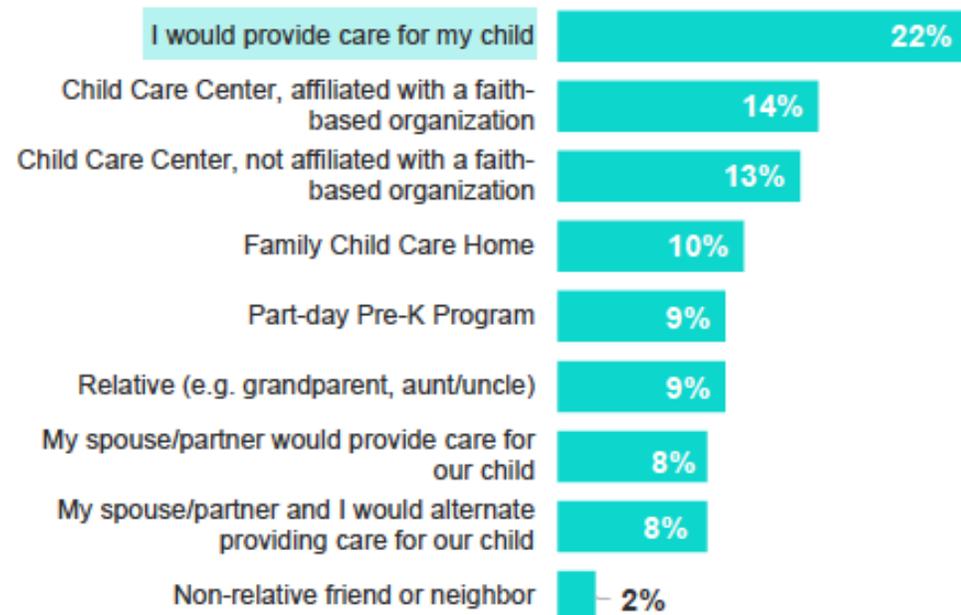
Which of the following best describe the **current primary** child care arrangement for your youngest child?



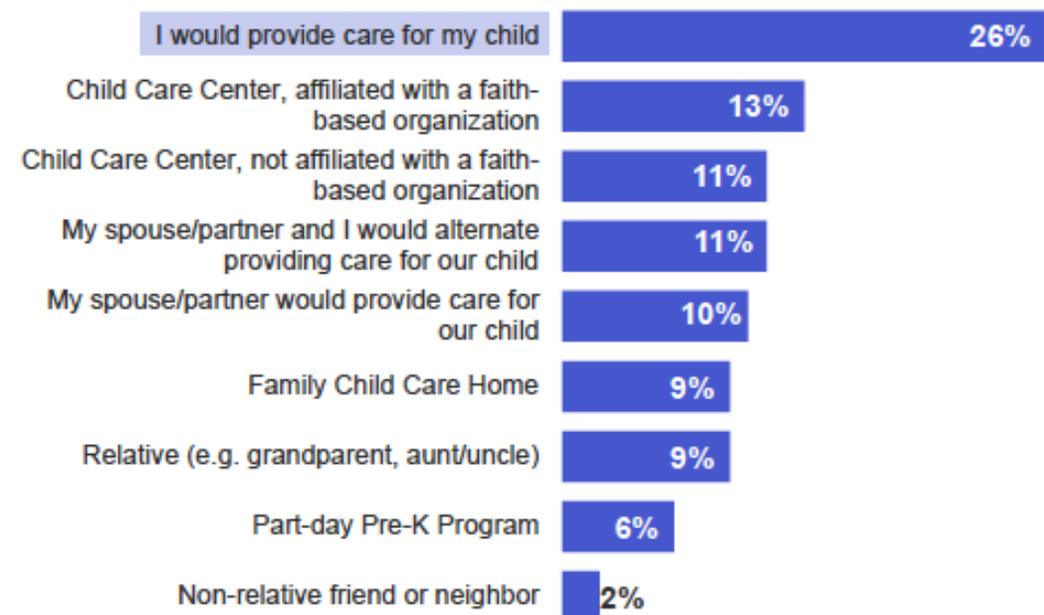
Ideal Child Care Arrangements

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?



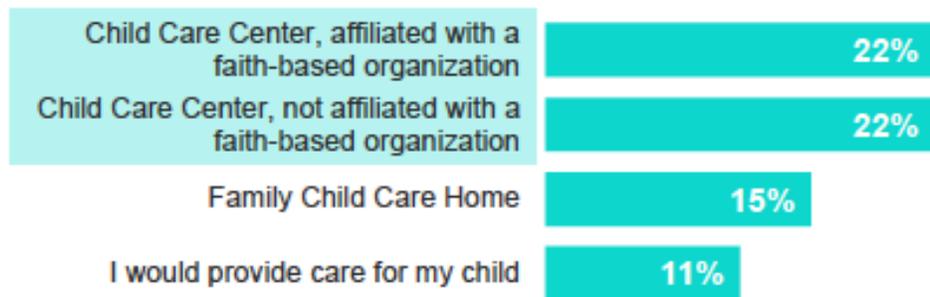
Right now, during COVID-19, if all types of arrangements were equally priced and equally accessible to your family, what would be your **ideal child care arrangement** for your youngest child?



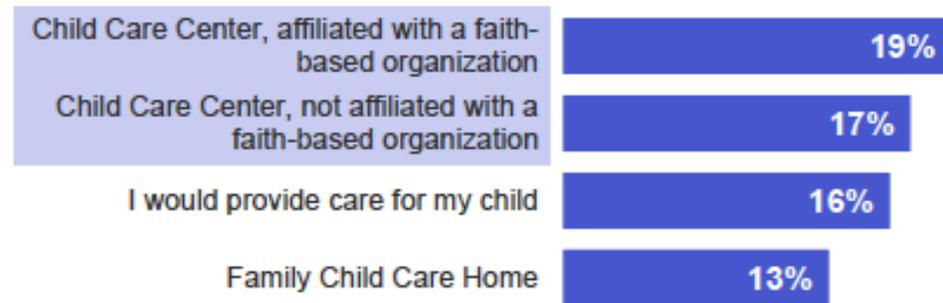
Ideal Child Care Arrangements

- 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?



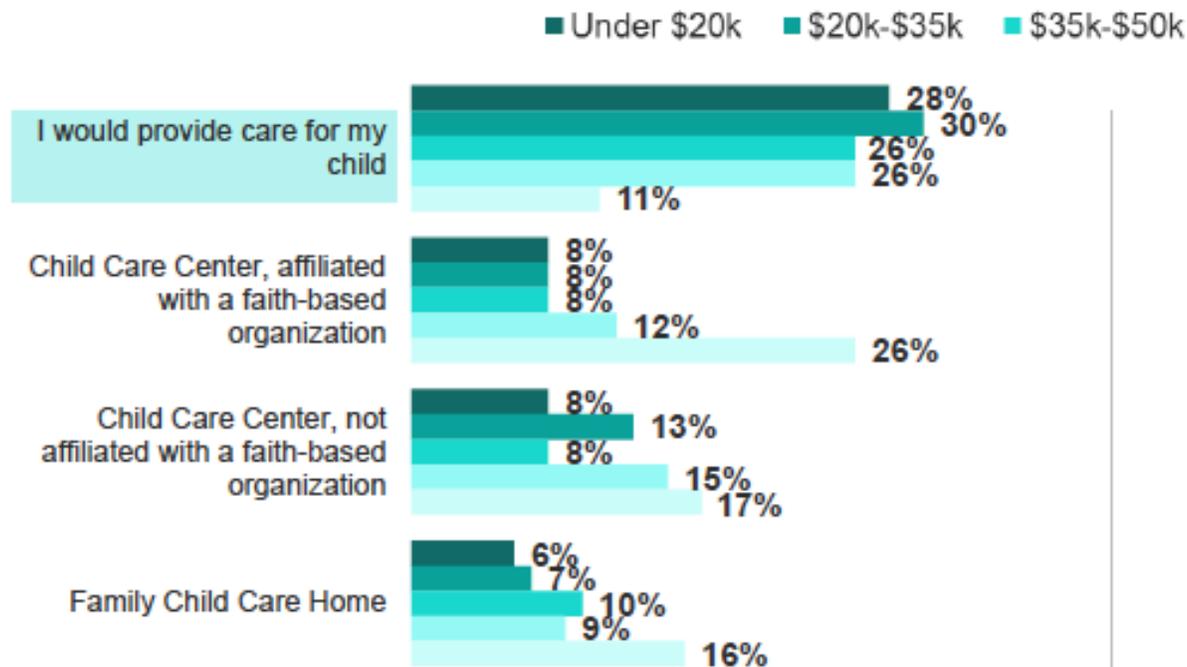
Right now, during COVID-19, if all types of arrangements were equally priced and equally accessible to your family, what would be your **ideal child care arrangement** for your youngest child?



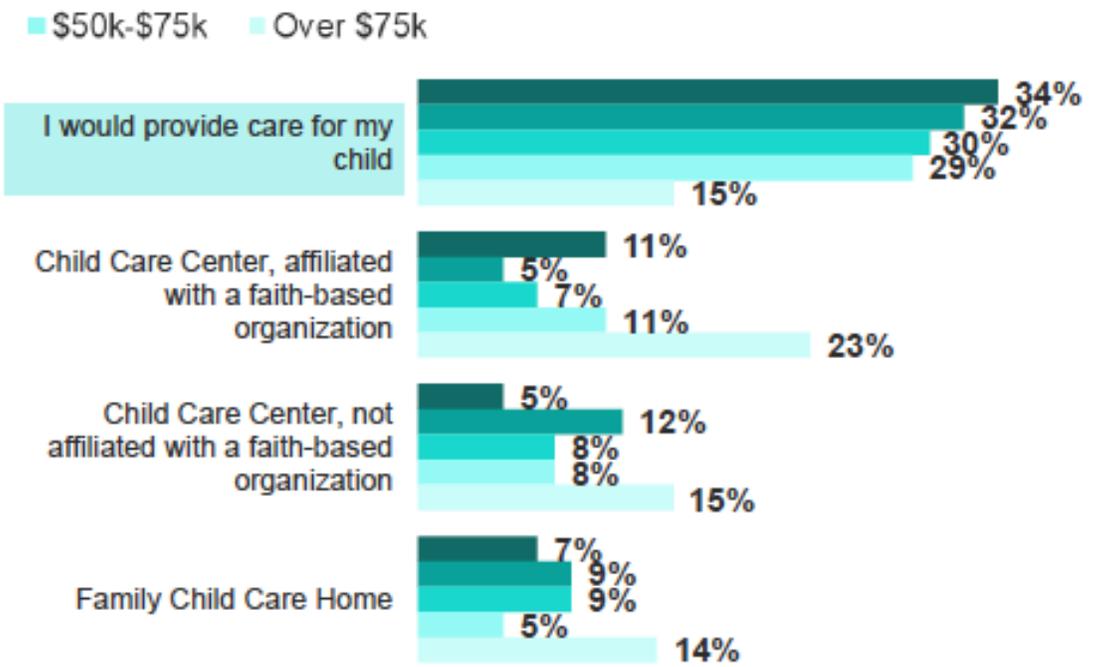
Ideal Child Care Arrangements

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?

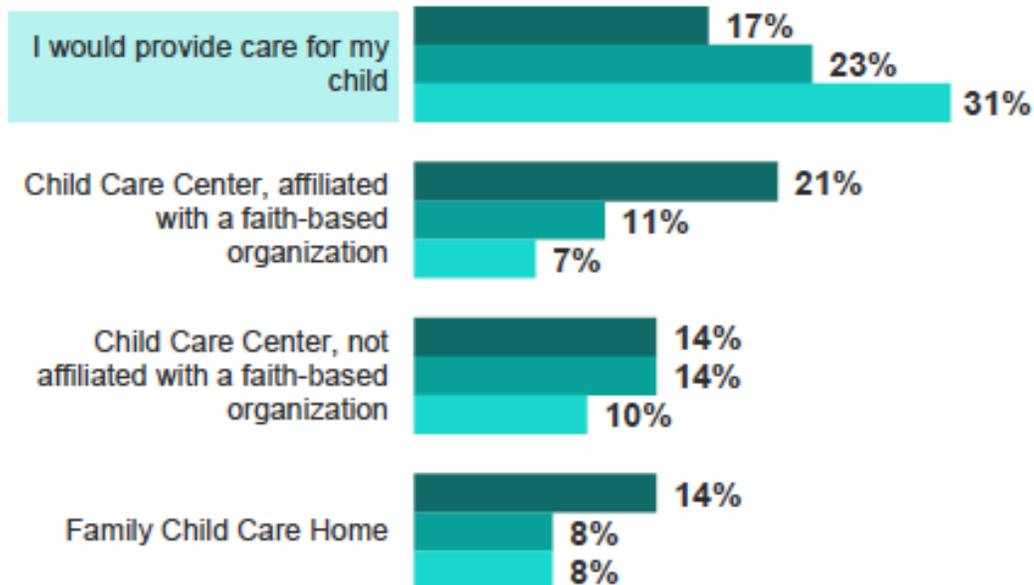


Ideal Child Care Arrangements

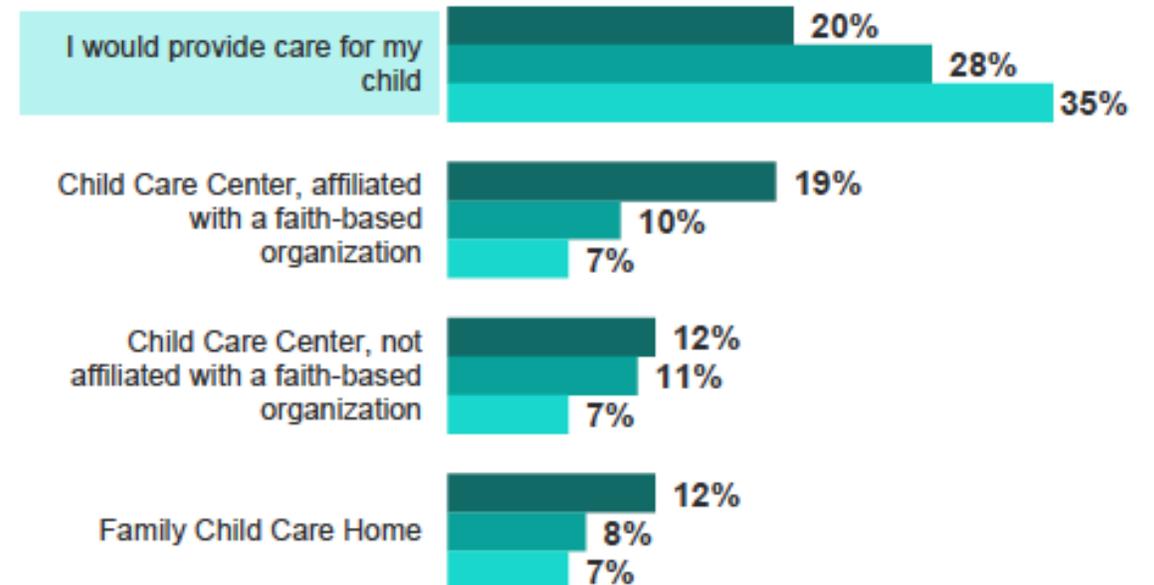
Rural parents are more likely than suburban and urban parents to indicate their ideal care arrangement in January and December 2020 is providing care themselves.

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 |
| 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% |



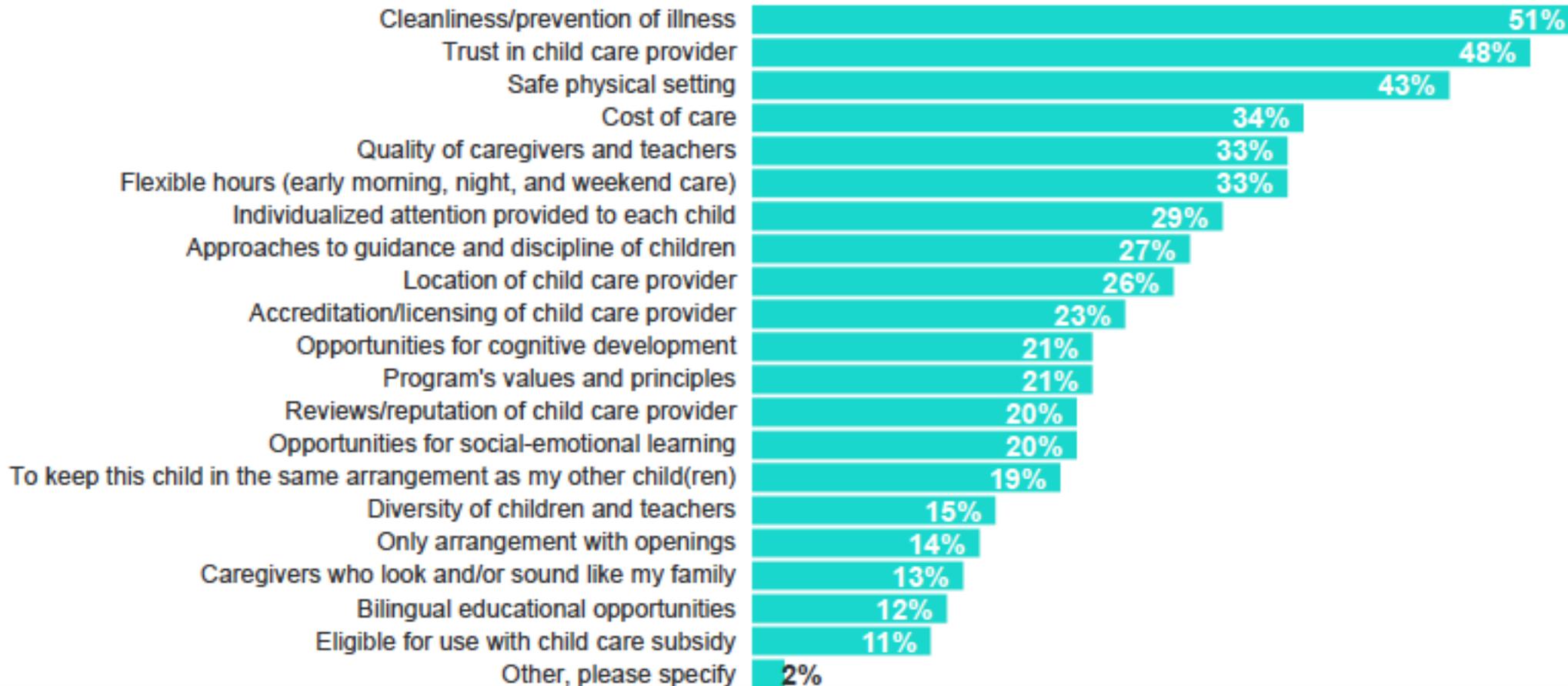


Parent Preferences: Important Factors for Selecting a Provider



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

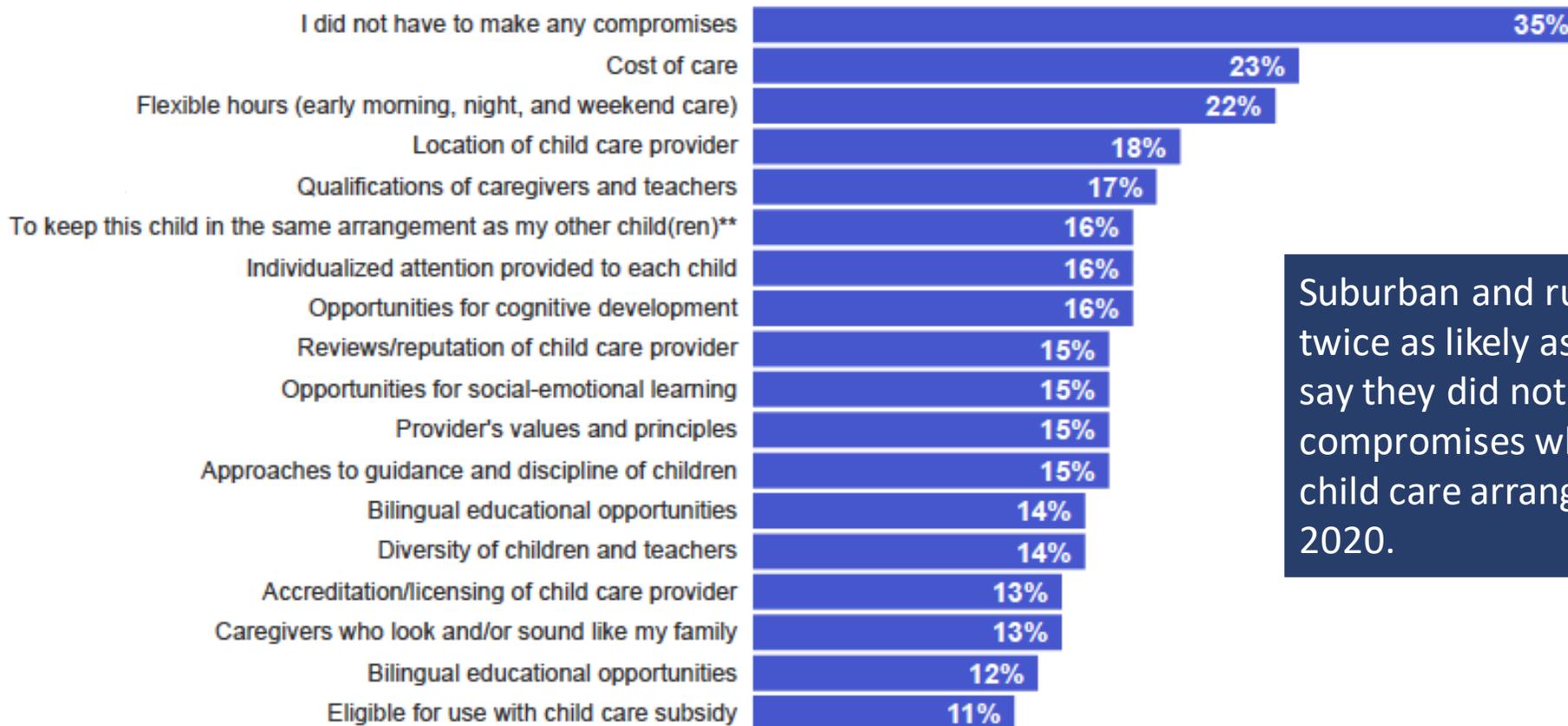
Half of parents in rural communities selected cost of care as an important factor when selecting their child care provider.

| 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.

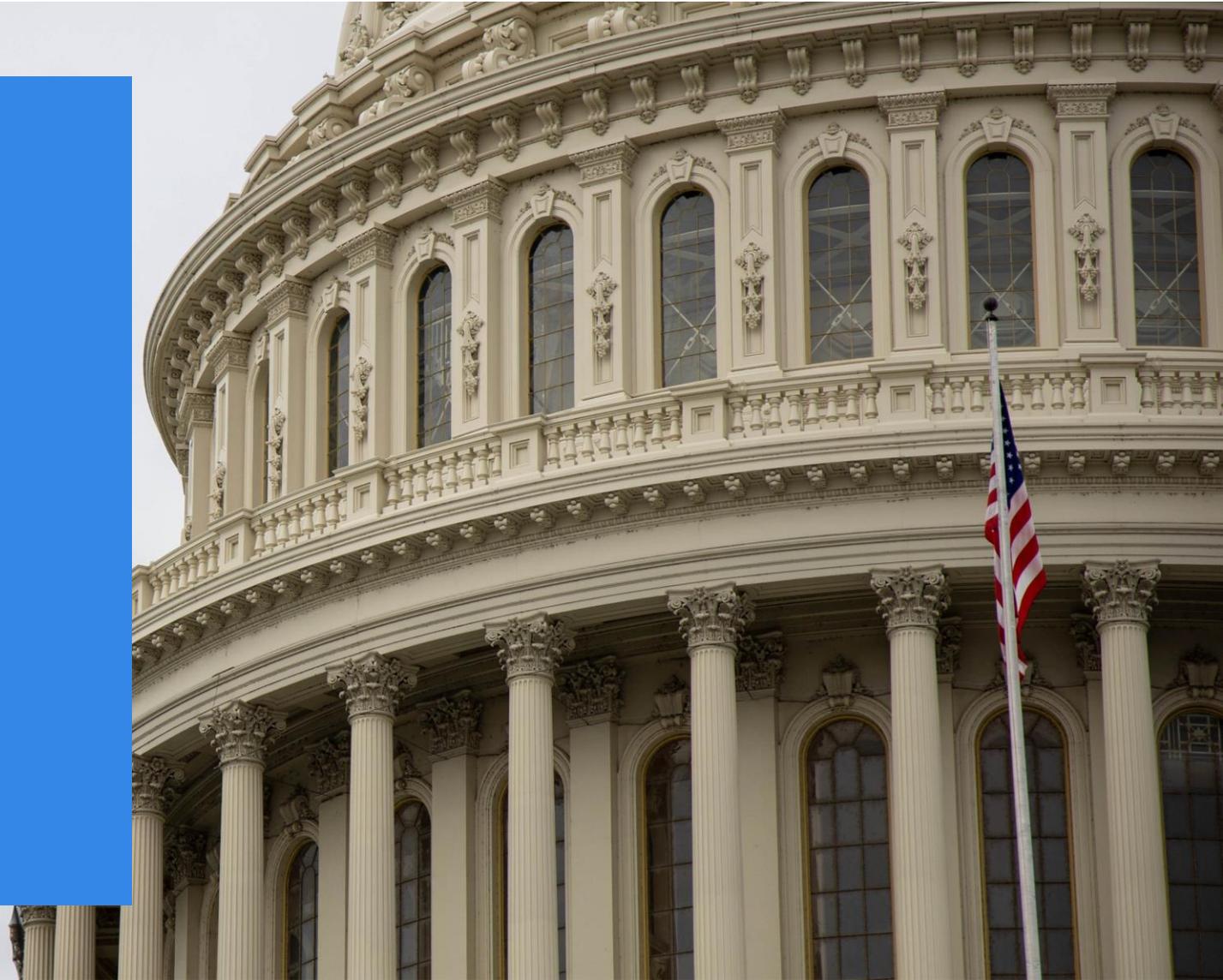




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Questions?

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 16 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.

