

KinderCare 2025 Parent Confidence Index



Background

- KinderCare partnered with The Harris Poll to identify factors impacting parent confidence today.
- We surveyed more than 2,000 U.S. parents with children under age 12.
- Six years in, our survey continues to shine a light on how parents are feeling today and on the important role access to high-quality early childhood education and care plays in improving parent confidence and mental health.

Key Insights

1.

Parents Fear Benefits Cuts as Childcare Crisis Deepens

Many working parents fear cost-cutting measures will lead to reductions in employer-sponsored child care benefits.

54% worry their company will scale back child care benefits in the future to cut costs.

2.

Unsupported Child Care System Threatens Parents' Future

Rising child care costs leave many families turning to government assistance, yet they face barriers to accessing it, leaving them feeling unsupported.

80% believe child care is a national issue that should be federally addressed and funded in 2025 by our political leaders.

3.

The Parent Mental Health Crisis Needs One Solution: Quality Care

Consistent, high-quality child care stands out as the #1 resource to alleviate stress and provide much-needed support for families.

90% agree, "quality child care gives me confidence as a parent."



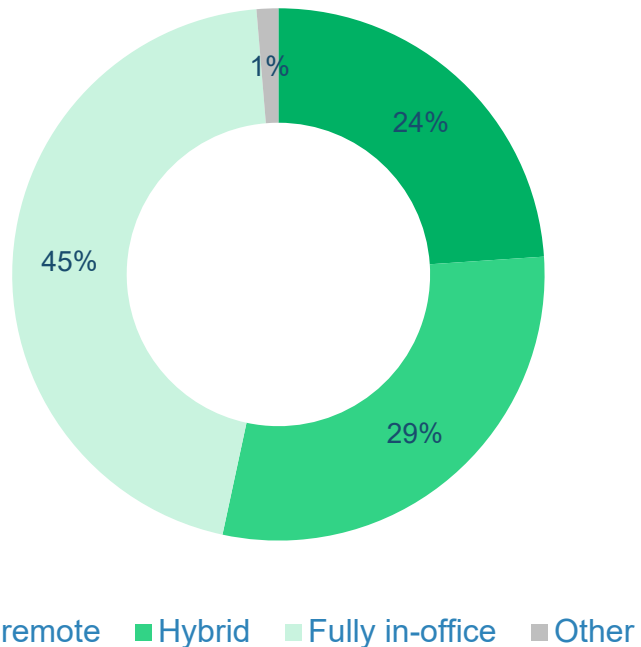
Working Parents & Child Care Needs



*Percentages in this section refer to the **employed sample** specifically unless otherwise noted

Most parents are back in the office in some capacity, and it's changing parent child care needs

Current working environments



74% of working parents are back **in the office** full-time or in a **hybrid** capacity

38% of parents say **all remote** is their **ideal** environment

49% agree, "I feel like I was **forced** to return to the office"

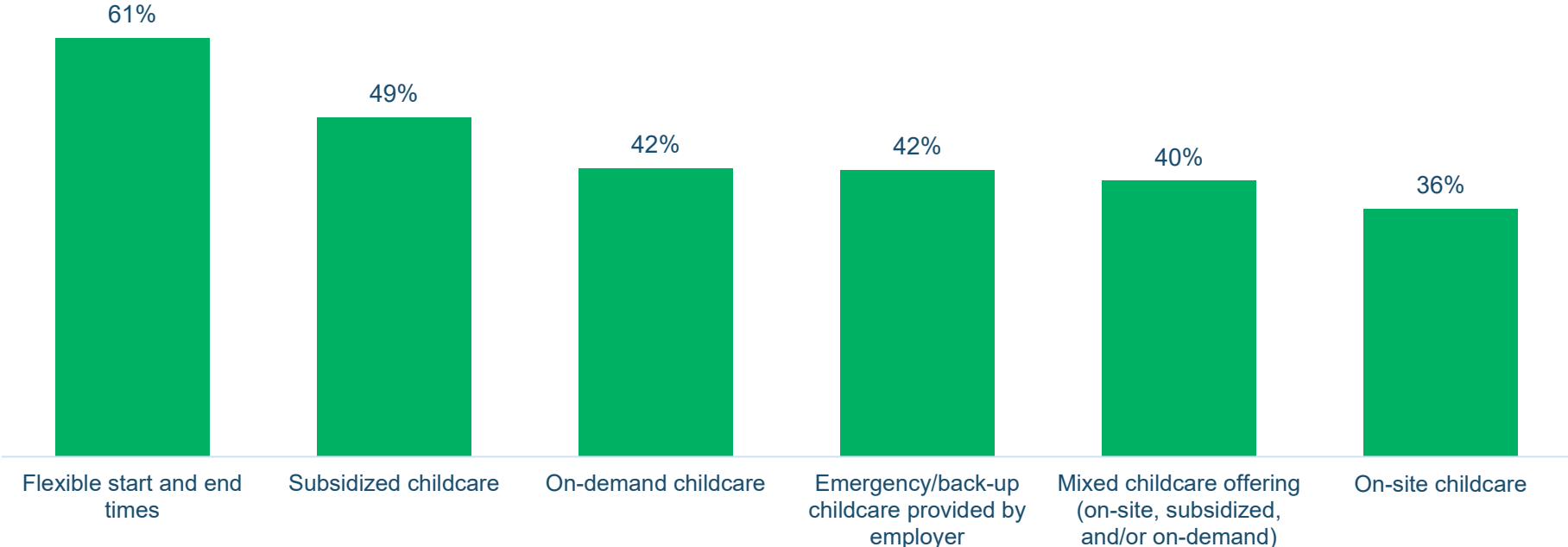
63% agree, "The return to in-person work has impacted my child care needs"

S4: Which of the following best describe your current, expected, and ideal work environments? (n=1,872 employed)
Q101: Please indicate how much you agree or disagree with each of the following statements. (T2B: Somewhat / Strongly Agree) (n= 2,504)



In 2024, parents wanted more flexibility, subsidies, and on-demand care upon a return to office

Percentage of parents who want benefits provided by employer upon RTO (2024)
(% Selected)

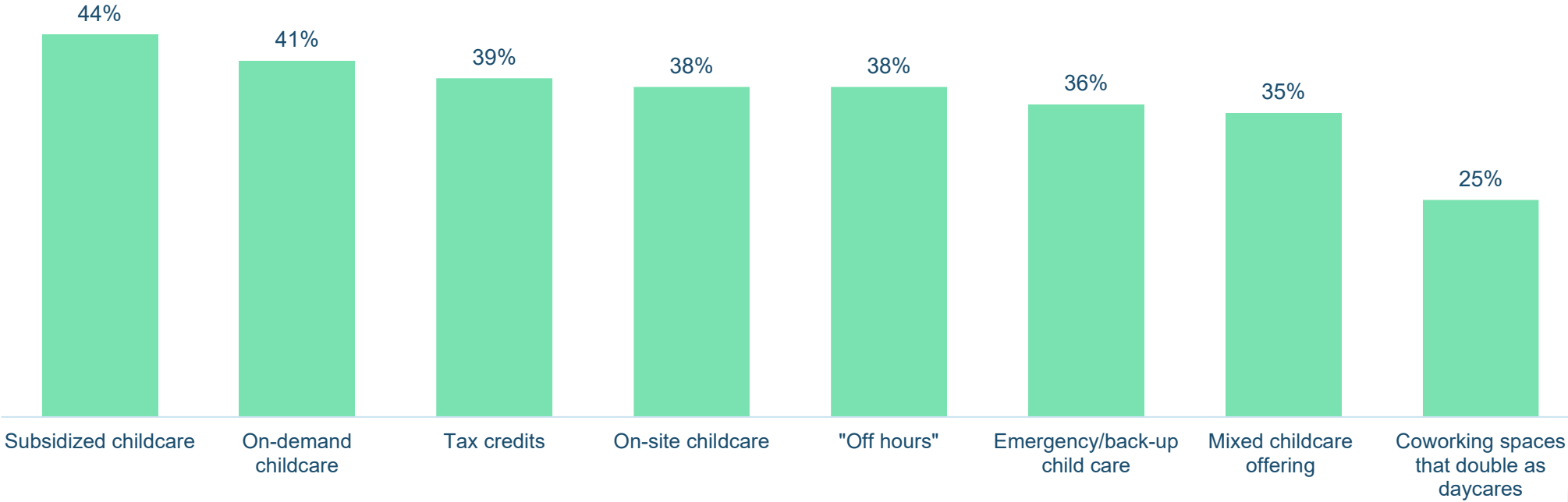


Q29a: What should employers offer more for employees as they roll out RTO (return to office) mandates? Please select all that apply. (n=1,475 employed)



This year, subsidized and on-demand child care remain top priorities for working parents as they return to office

Benefits that families want employers to offer as they roll out RTO mandates

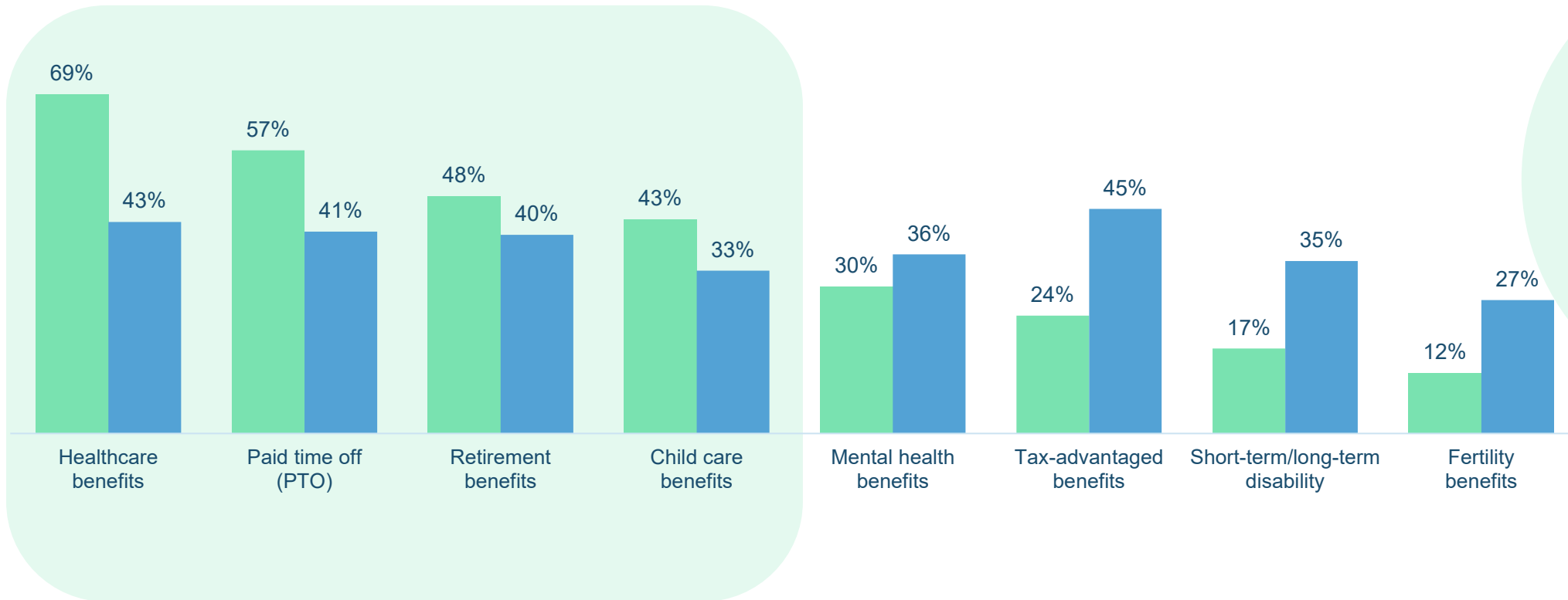


76% agree, "I believe employers should offset the cost of childcare for their employees"

Q105: What should employers offer more for employees as they roll out RTO (return to office) mandates? (n=1,872 employed)
Q19: "I believe employers should offset the cost of childcare for their employees." (T2B: Somewhat / Strongly Agree) (n=1,872 employed)

There's a gap between benefits employees want vs what execs think they want

■ Parents ■ CHROs



59% agree,
 “I would rather my employer subsidize my child care costs than give me a raise”
 +10% from 2024^
 +8% from 2023^

Q1: How important are the following categories of benefits to your company's competitive advantage in the market? (Top 3 Ranking: 1-3) (n=152)
 Q102: When considering staying at your current job, how important are the following benefits in your consideration process? (n=1,872 employed) (Top 3 Ranking: 1-3)
 Q25a: "I would rather my employer subsidize my childcare costs than give me a raise." (T2B: Somewhat / Strongly Agree) (n=1,872 employed)



Employees want more info on existing child care benefits and want them to be easier to understand and use

72% agree,

“HR constantly talks about employee benefits but **barely talks about child care benefits**”

63% agree,

“Current employer-provided child care benefits are **more difficult to use** than health benefits”

49% agree,

“It’s **difficult to understand** my current child care benefits”

Q16a: Please indicate how much you agree or disagree with the following statements. (T2B: Somewhat / Strongly Agree) (n=1,872 employed)



Parents are concerned child care benefits will be taken away

80% agree,

“When companies cut child care benefits, it feels like a slap in the face as a working parent”

54% agree,

“I’m worried my company will scale back child care benefits in the future to cut costs”

73% agree,

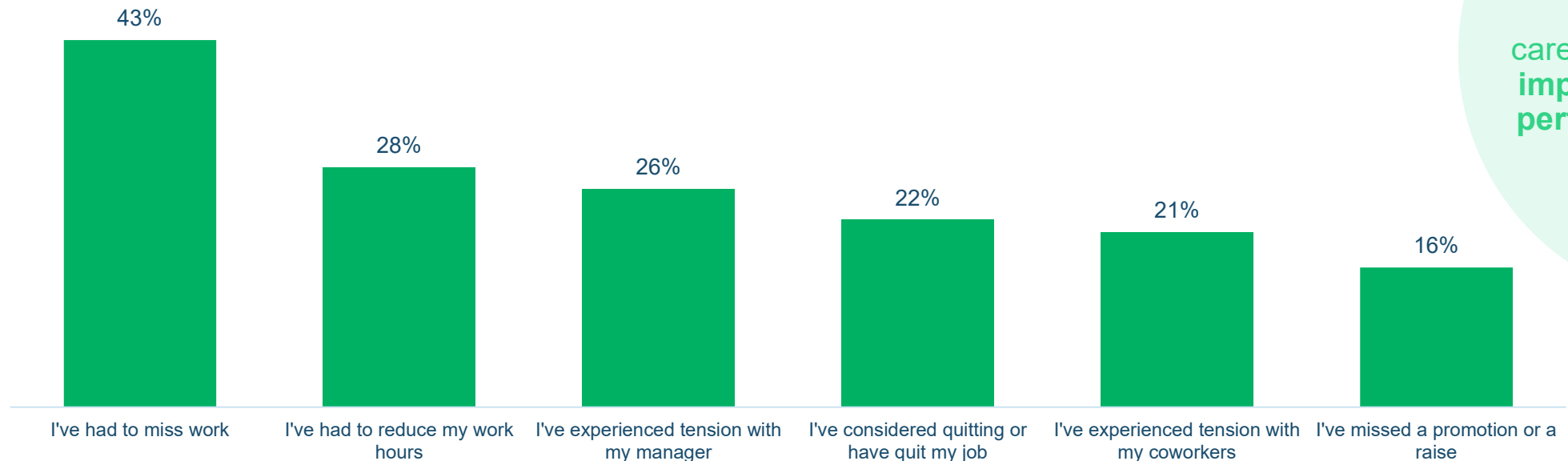
“It would be impossible to do my job without high-quality child care”

Q16a: Please indicate how much you agree or disagree with the following statements. (T2B: Somewhat / Strongly Agree) (n=1,872 employed)



Child care challenges negatively impact employee performance

Which of the following have you experienced due to a lack of reliable child care?



57% agree, "Unreliable child care has **negatively impacted my work performance in the past.**"

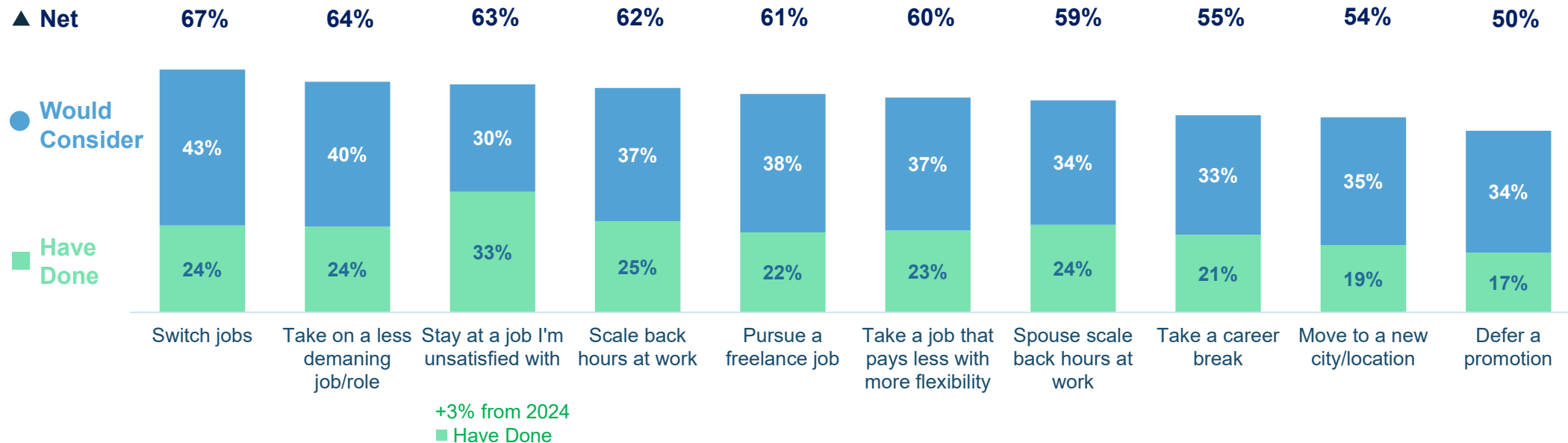
Q112: Which of the following have you experienced due to a lack of reliable child care, if any? (n=1,872 employed)

Q114: Please indicate how much you agree or disagree with each of the following statements. (T2B: Somewhat / Strongly Agree) (n=2,504)



Parents are prioritizing child care over their careers

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



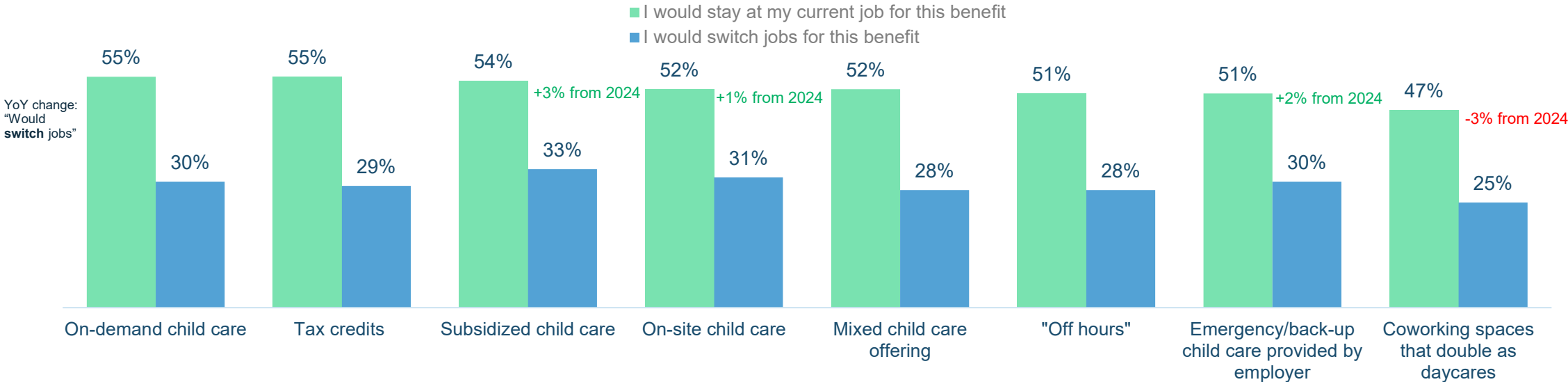
53% agree, "I am worried that I will have to **step back** from my career to take on my parenting responsibilities"

Q10a. Have you ever or would you consider doing any of the following because it is too difficult or expensive to find child care? (n=1,872 employed) YOY
Q19: Please indicate how much you agree or disagree with each of the following statements. (T2B: Somewhat / Strongly Agree) (n=1,872 employed)



Child care benefits remain key to attracting, retaining top talent

Child care benefits that would convince parents to stay or switch jobs



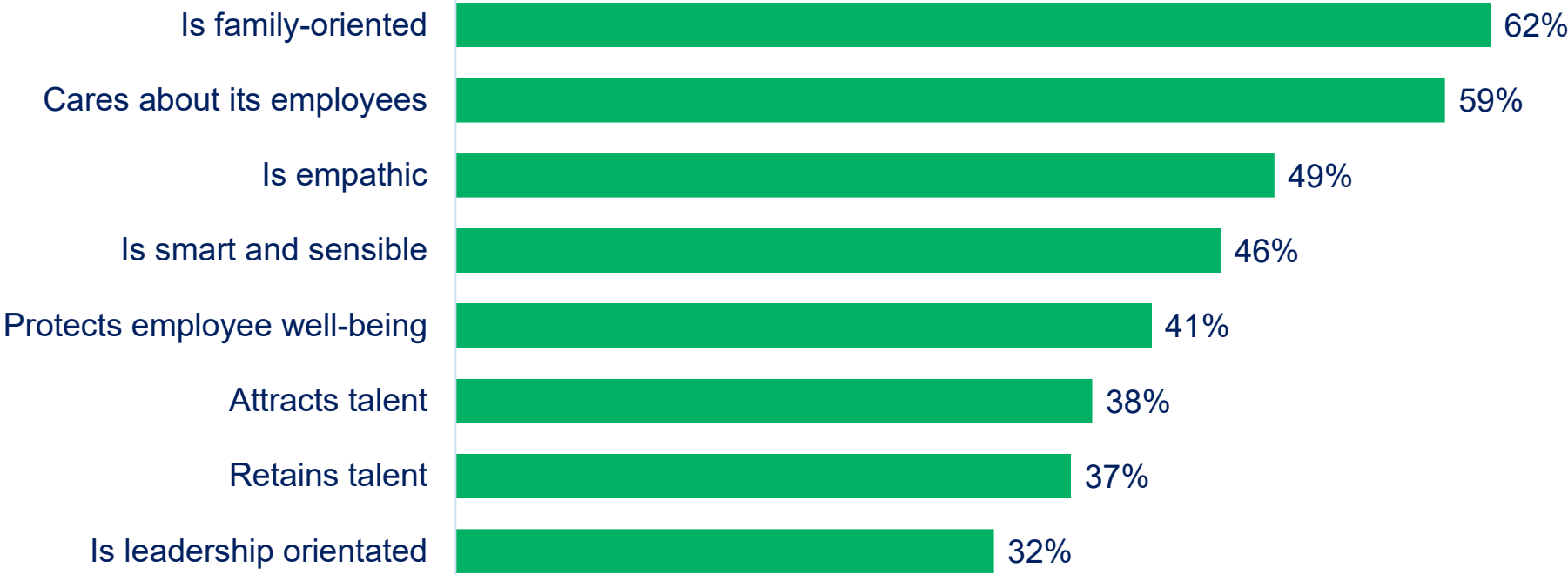
Q13: When thinking about child care and your job, which of the following benefits would convince you to stay or leave if provided by your current employer or potential employer? (n=1,872 employed)
 Q25b: Please indicate how much you agree or disagree with each of the following statements. (T2B: Somewhat / Strongly Agree) (n= 2,504)

50% agree, "I'm actively looking for a new job with better child care benefits"

Child care benefits have a ripple effect on employer's reputation

An employer that offers on-demand childcare...

83% agree,
“How a company supports its employees who are parents reflects how it cares for its employees overall”



Q108: What is your perception of an employer that offers on-demand child care as a benefit (i.e., the ability to find and book child care last minute)? (n=1,872 employed)
Q16a: Please indicate how much you agree or disagree with the following statements. (T2B: Somewhat / Strongly Agree) (n=1,872 employed)



What Parents are Looking for when Choosing Child Care



Quality child care brings peace of mind

90% agree,

“Quality child care gives me **peace of mind** to get my job done”

82% agree,

“It’s **bittersweet** dropping my child off at a quality child care environment

85% agree,

“Even though I can’t control a lot of things in the world, choosing high-quality child care or education for my child relieves my anxiety”

Q25b: Please indicate how much you agree or disagree with each of the following statements. (T2B: Somewhat / Strongly Agree) (n=1,872 employed)

Q114/Q115: Please indicate how much you agree or disagree with each of the following statements. (T2B: Somewhat / Strongly Agree) (n=2,504)

Parents note the undeniable impact of quality child care

88% agree,

“I have **immense gratitude for the caregivers and educators** who take care of my child”

80% agree,

“My child has come home and **expressed loving sentiment** about a child care worker or teacher”

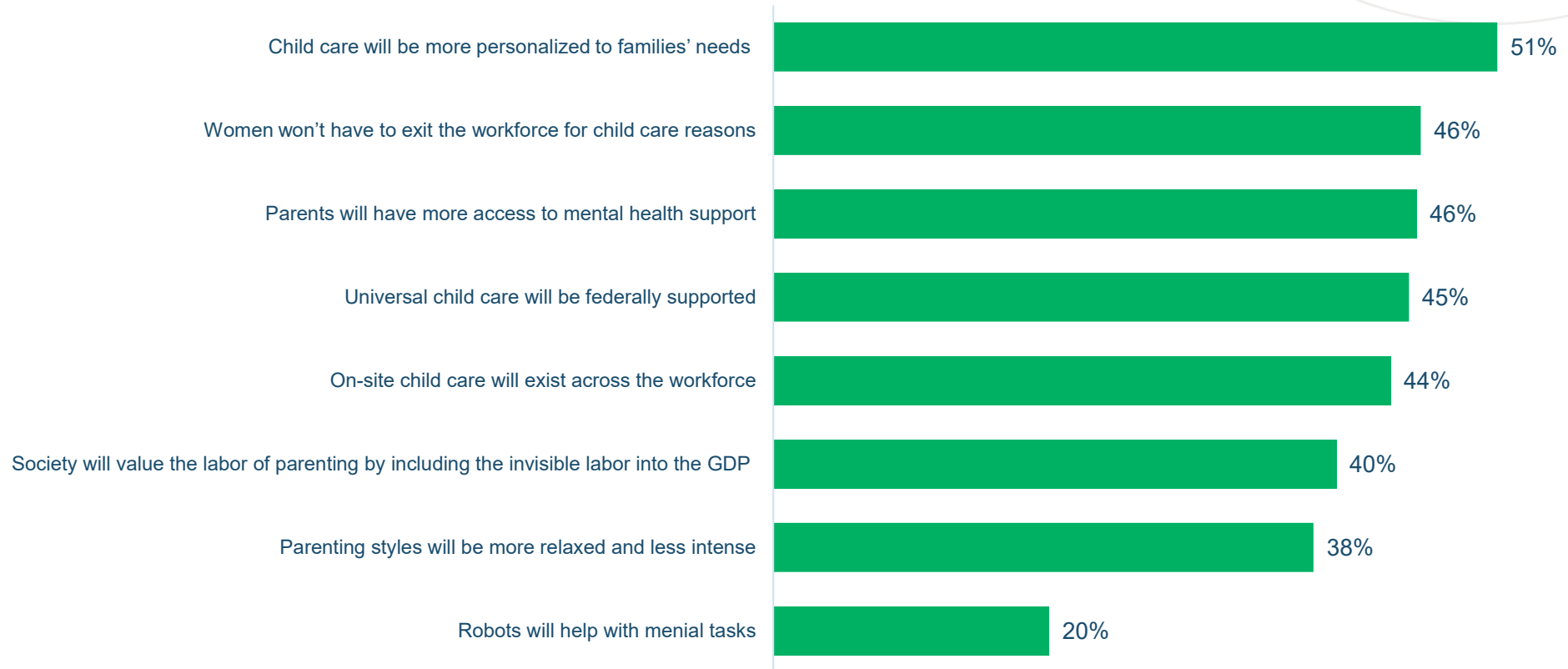
85% agree,

“Even though I can't control a lot of things in the world, choosing high-quality child care or education for my child **relieves my anxiety**”

Q115: Please indicate how much you agree or disagree with each of the following statements. (T2B: Somewhat / Strongly Agree) (n=2,504 | n=1,872 employed)

Parents hope improved, personalized child care will shape a brighter future

What gives parents hope for their children's future...



Q115: Please indicate how much you agree or disagree with each of the following statements. (T2B: Somewhat / Strongly Agree) (n=2,504)

Q116: When thinking about the world that your children will grow up in, what do you hope will be true when they have their own children? (n=2,504)



Appendix



Methodology

This survey was conducted online within the United States by The Harris Poll on behalf of KinderCare from November 21, 2024, to December 2, 2024, among 2,504 parents with children age 12 and younger. Within the sample we surveyed 1,053 parents with children age 5 and under, and 1,451 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

Who did we talk to?

Race/ethnicity

- Black (n=362)
- White (n=1,580)
- Hispanic (n=346)
- Asian (n=121)
- BIPOC (n=924)

Gender

- Women (n=1,479)
- Men (n=998)
- Other/prefer not to say (n=27)

Industry

- Education (n=180)
- Finance (n=132)
- Healthcare (n=302)
- Tech (n=200)
- Academia (n=20)
- Other industry (n=1,038)

Generation

- Gen Z (n=211)
- Millennial (n=1,479)
- Gen X (n=703)
- Boomer+ (n=111)

Work status

- Working parents (n=1,872)
- Not working parents (n=632)

Work environment

- Remote (n=422)
- Hybrid (n=541)
- Office (n=884)

Child(ren) Age

- Young Children (under 5) (n=1,053)
- Older Children (over 5) (n=1,451)

Primary child care

- Daycare/preschool (n=972)
- Nanny (n=648)
- Stay at home parent (n=1,325)
- Work from home parent (n=916)
- Family/friends (n=1,259)
- After school programs (n=984)

Income

- Low Income (<\$40K) (n=520)
- Middle Income (\$40K-\$99.99K) (n=1,020)
- High Income (\$100K+) (n=964)

