

NATIONAL CHILD CARE SURVEY

April 2020



Save the Children
Action Network™

METHODOLOGY



1,200 interviews
Nationwide among
registered voters
Survey conducted in
conjunction with GQR



Live interviews on
both landlines and
cell phones with 40%
of all interviews
conducted on cell
phones



April 11-15, 2020

KEY FINDINGS

1. Voters make clear the vital role child care plays in the lives of Americans and demonstrate their anxiety over the pandemic's effect on the industry.
2. Voters overwhelmingly support broad, industry specific federal financial assistance for the child care industry – eight in ten support financial assistance.
3. Support is also strong for many specific proposed federal actions – notably 87% of voters support the idea of providing enough support during the crisis so that current child care providers are able to make payroll and pay other expenses such as rent and utilities.
4. This levels of support cross partisan, racial, generational and economic boundaries.

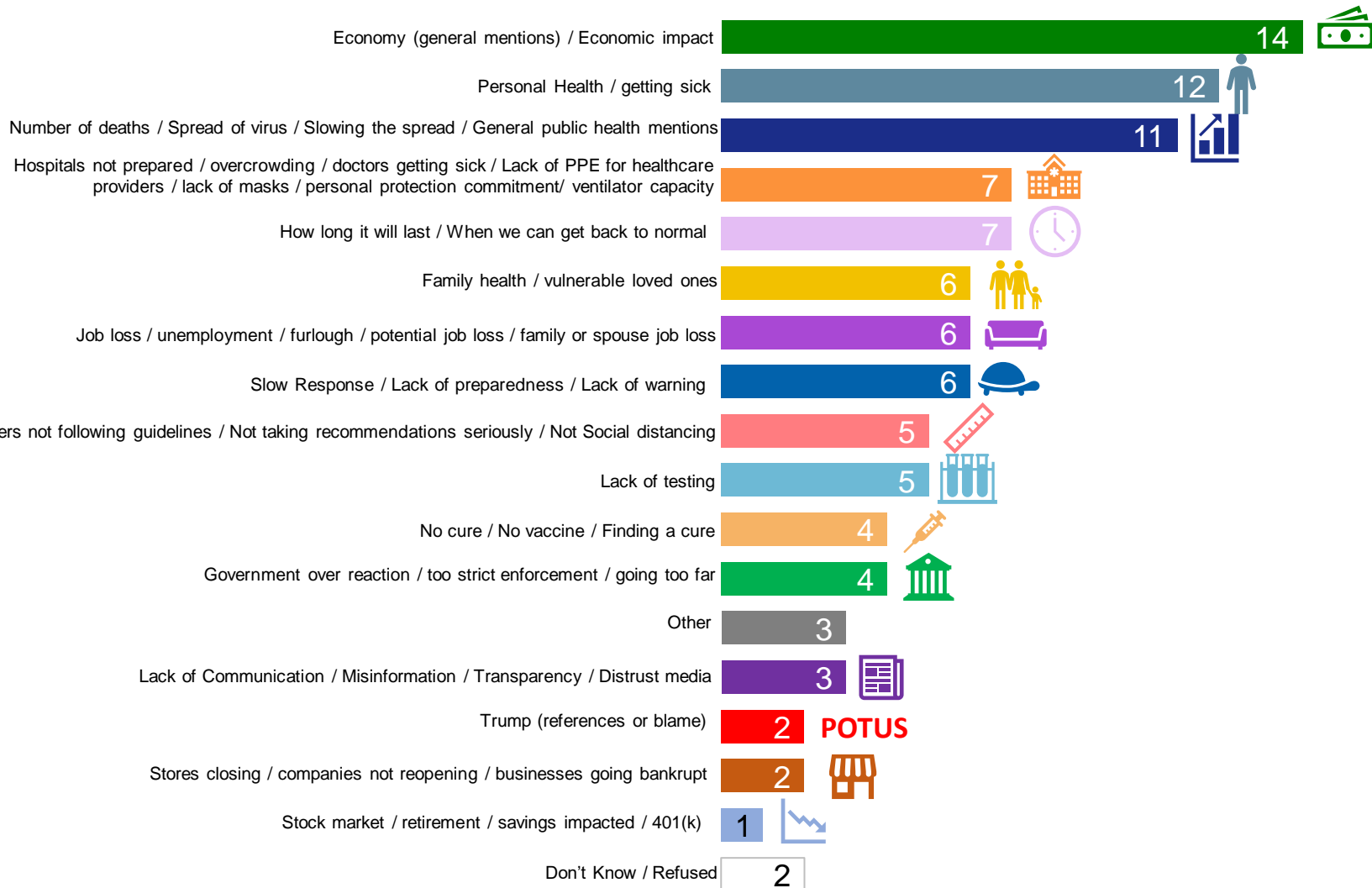
INITIAL VIEWS ON CORONAVIRUS



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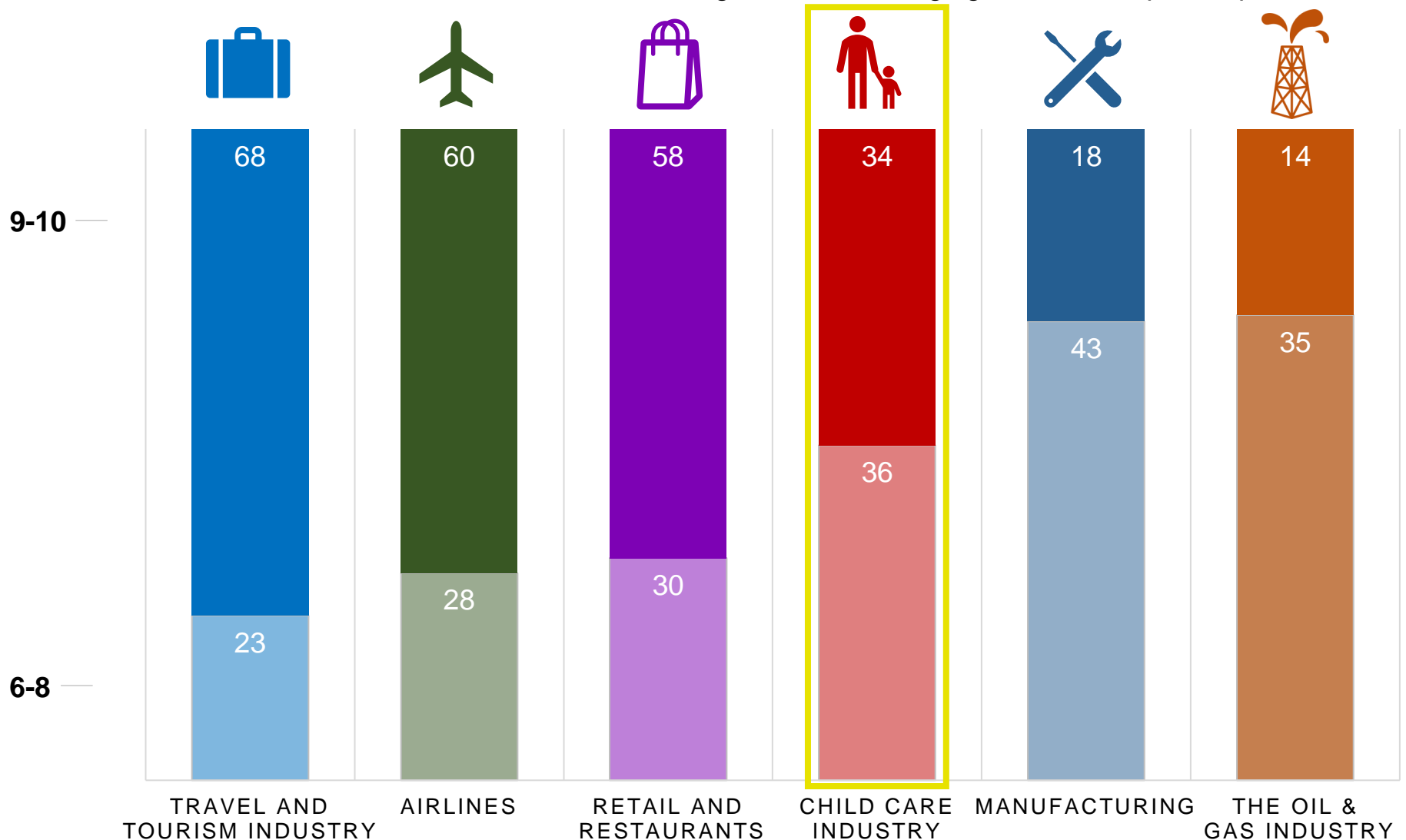
Biggest Concerns Regarding the Coronavirus

And what would you say is your biggest concern regarding the coronavirus?



Coronavirus Damage to Industries

All industries in the country have been impacted by the coronavirus to some degree. I am going to read you several industries, for each one please indicate how damaging you think the effects of the pandemic have been and will be on a scale from 0 to 10, with 10 being the most damaging and catastrophic impact...



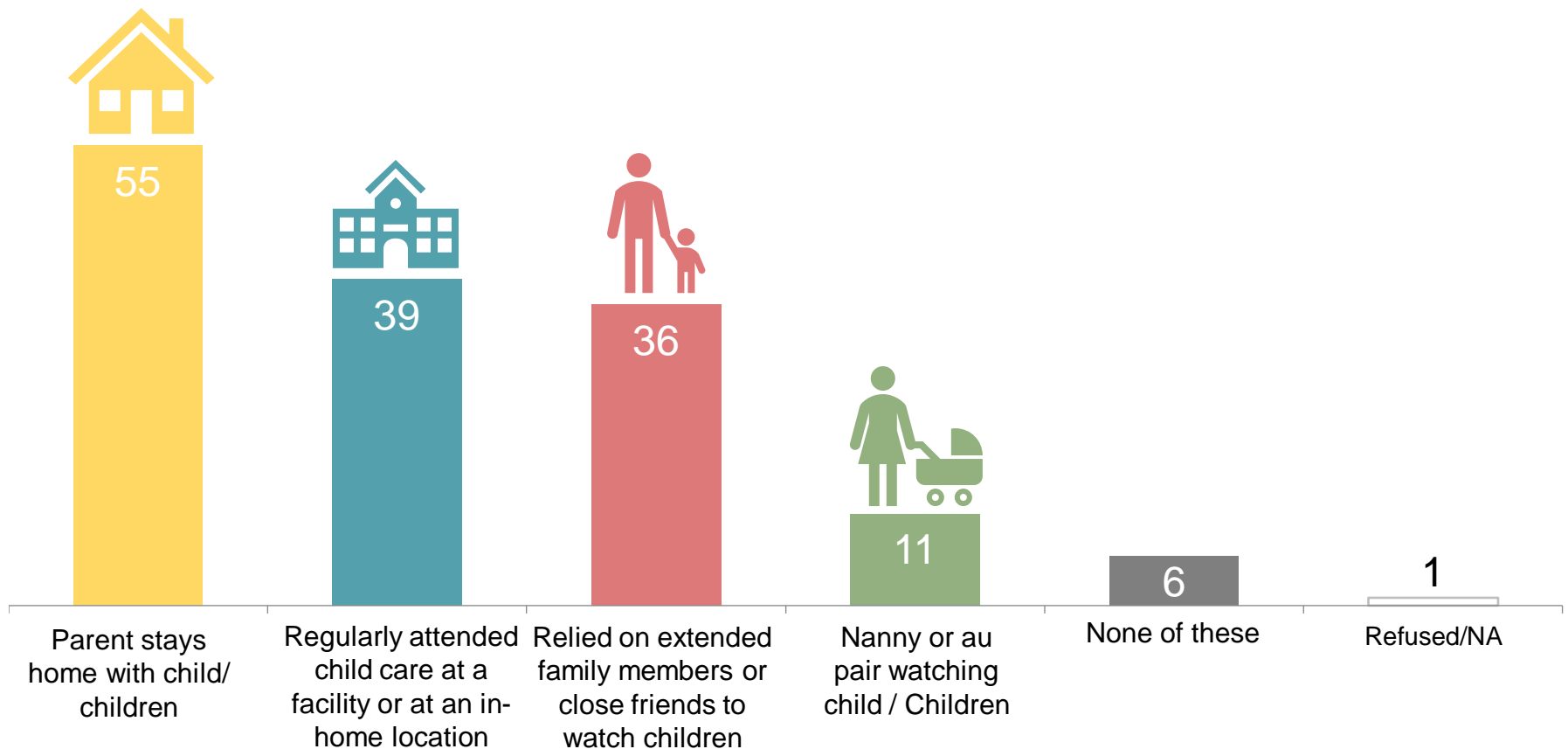
CORONAVIRUS & CHILD CARE



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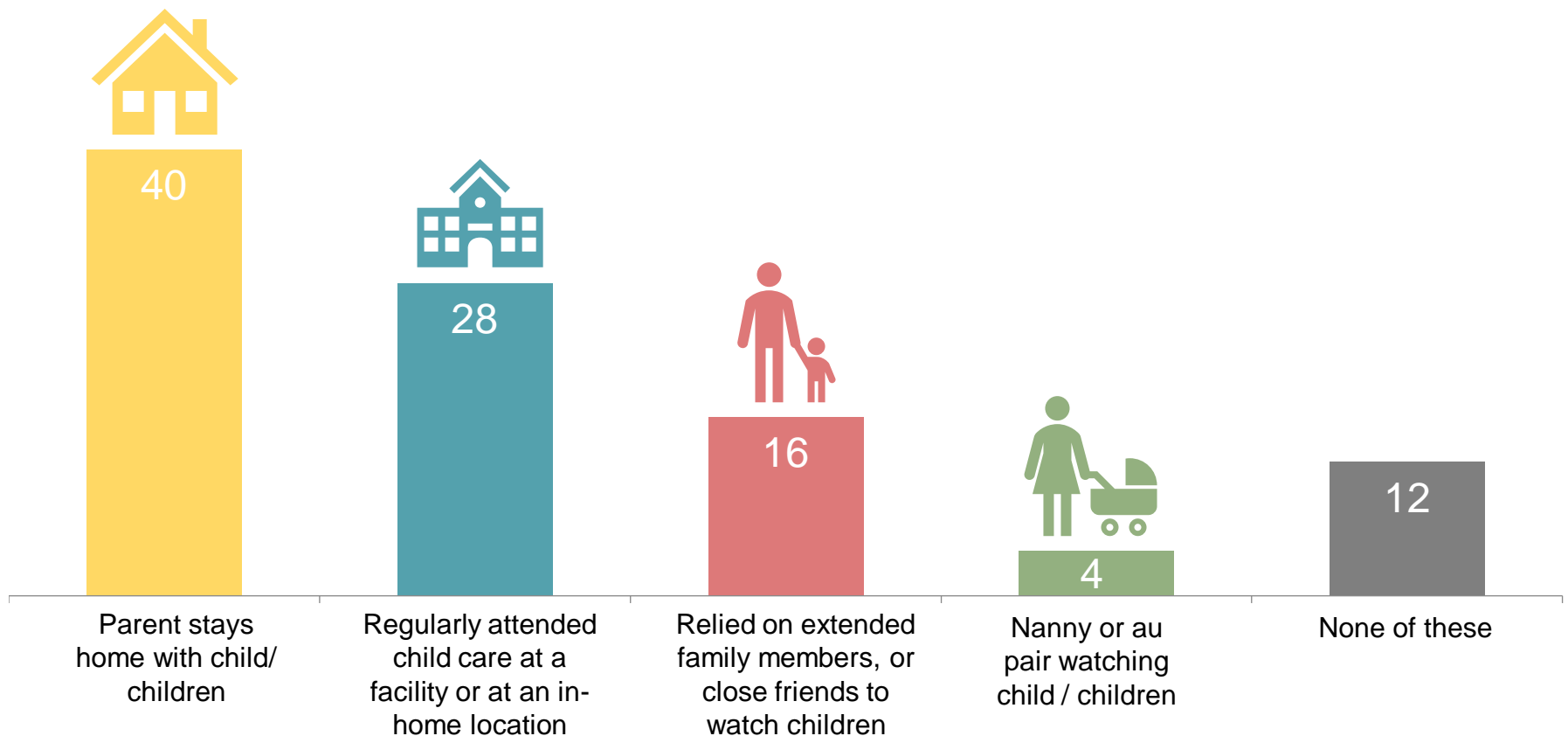
Experience with Child Care

[Only among those who have children in the household or at one point had children living in their household]
Which of the following child care options have you used, either currently or in the past? ?



Pre-Pandemic Child Care Use

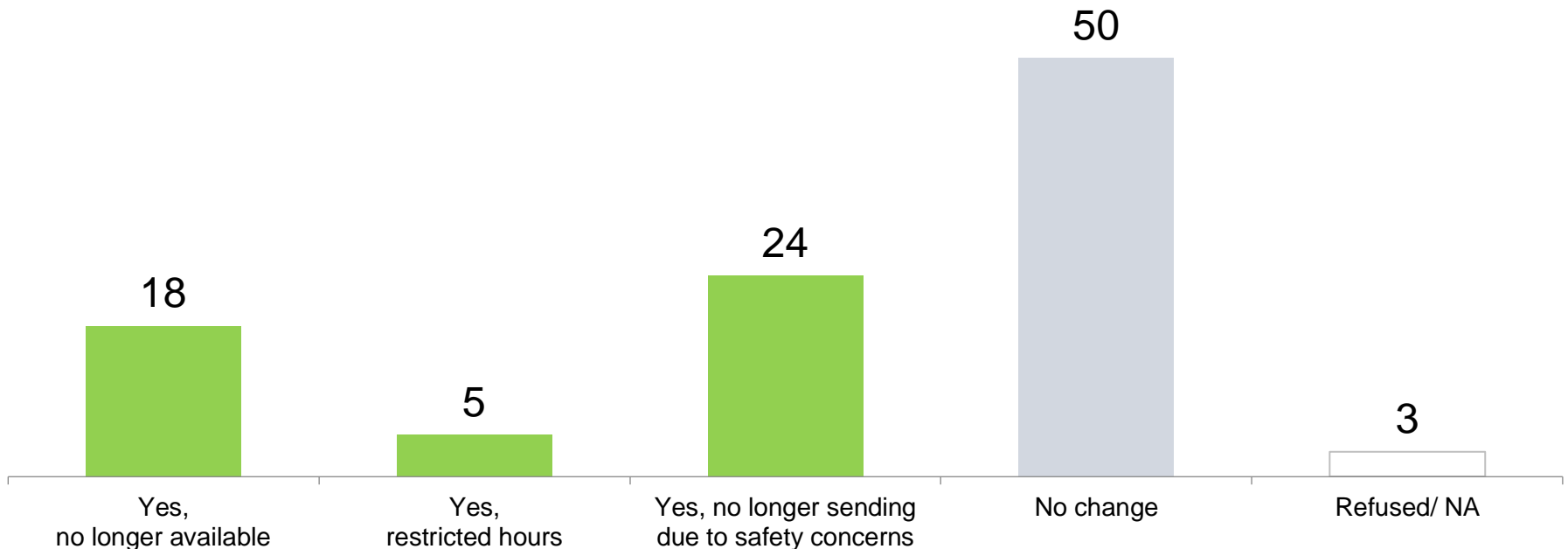
[Only among those who have children in the household currently]
Before the coronavirus pandemic, which of the following was your primary child care option?



Impact on Child Care

Regardless of which of the above child care options you use, have you had to make changes to your child care routine because of the coronavirus?

Nearly half (47%) of parents of children 18 and younger have had to make changes to their child care routine

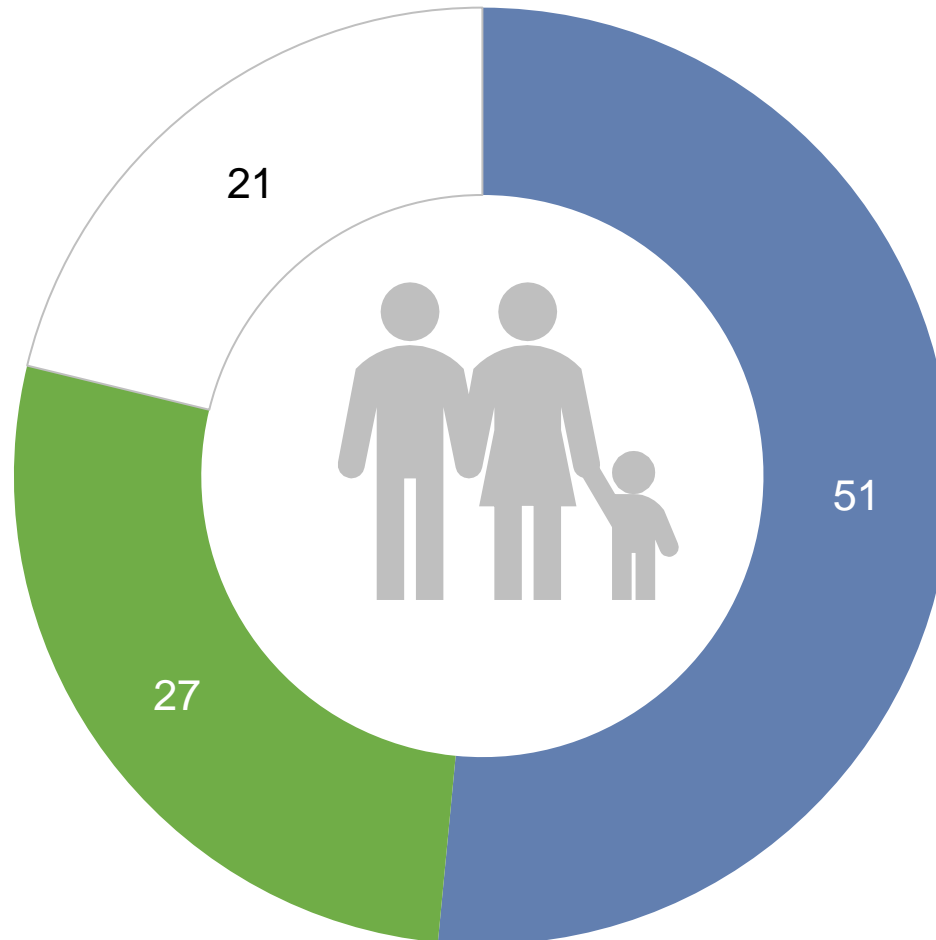


Greater Concern for Parents Not Returning to Work

And thinking more broadly about the impact of the pandemic on child care in the US, which of the following is a greater concern to you?

Children may not have access to quality child care after the coronavirus pandemic is over

Parents may not be able to find child care and it could prohibit them from returning to work



Both equally concerning
/ Neither / Don't Know

Concern that parents may not be able to find child care and could prohibit them from returning to work is even stronger among **millennials (61%)**.

FINANCIAL ASSISTANCE TO THE INDUSTRY

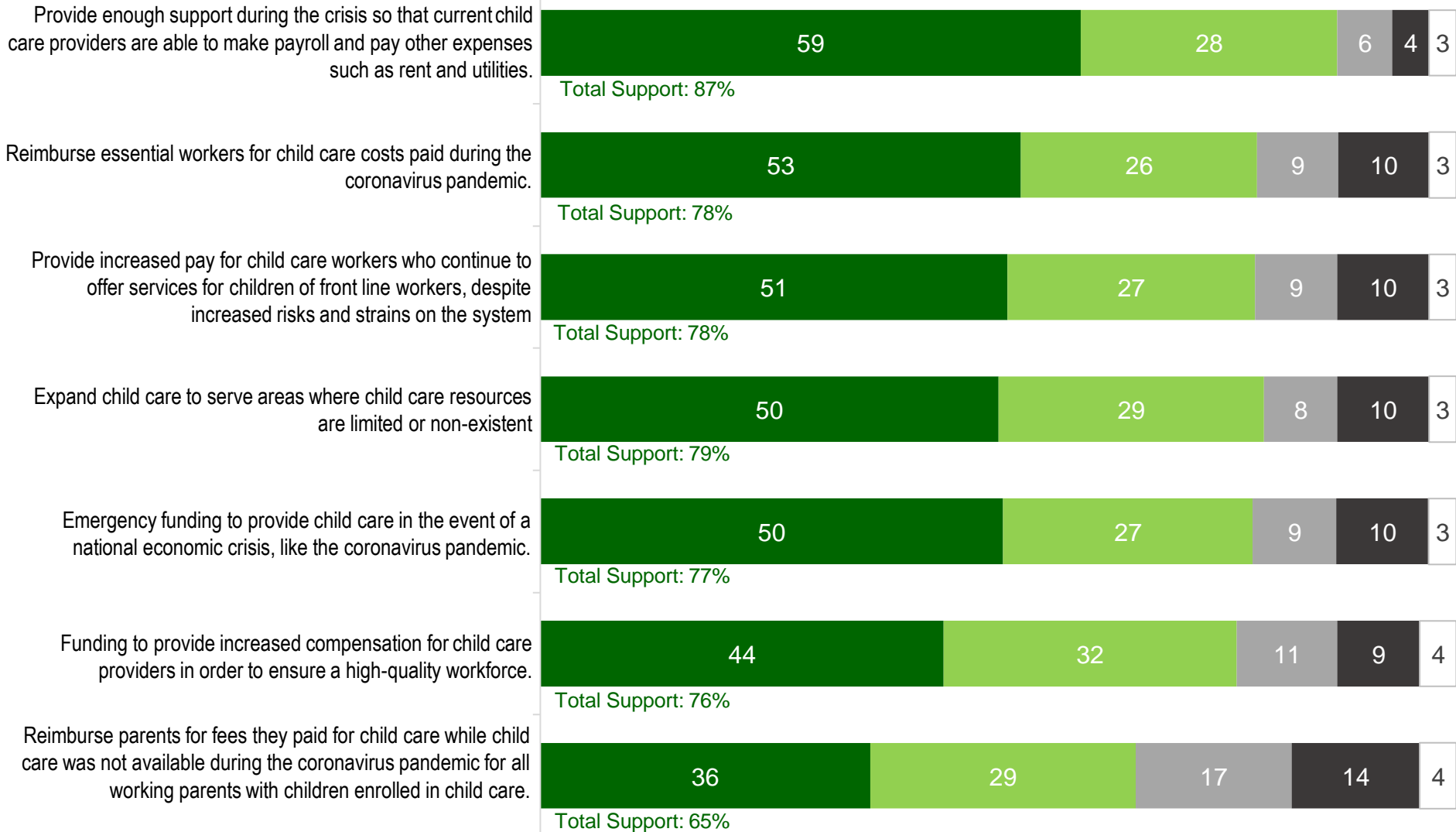


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Support for Specific Policy Actions

There are several ways that the federal government could provide aid and assistance to the child care industry in the US – For each of the following policies, please tell me if you would support or oppose. **policy actions sorted by strongly support**

Strongly Support Somewhat Support Somewhat Oppose Strongly Oppose Don't Know / Refused



Policy Actions Matrix Key

POLICY	ABBREVIATION
Provide enough support during the crisis so that current child care providers are able to make payroll and pay other expenses such as rent and utilities.	Payroll Support During Crisis
Reimburse essential workers for child care costs paid during the coronavirus pandemic.	Reimburse Essential Workers
Provide increased pay for child care workers who continue to offer services for children of front line workers, despite increased risks and strains on the system	Increased Pay to Front Line Workers
Expand child care to serve areas where child care resources are limited or non-existent	Expand Child Care to Areas in Need of it
Emergency funding to provide child care in the event of a national economic crisis, like the coronavirus pandemic.	Emergency Funding for Crises
Funding to provide increased compensation for child care providers in order to ensure a high-quality workforce.	Compensation for High Quality Workers
Reimburse parents for fees they paid for child care while child care was not available during the coronavirus pandemic for all working parents with children enrolled in child care.	Reimburse Parents for Unused Child Care

Policy Action Matrix

The below matrix indicates the most popular policies among key demographics – by total support.

POLICY	PARTY			AGE				GENDER		RACE		
	Rep	Ind	Dem	18-34	35-54	55-64	65+	Male	Female	White	Black	Hispanic
Payroll Support During Crisis	1	1	1	2	1	1	1	1	1	1	1	1
Expand Child Care to Areas in Need of it		2	2	1					2	2		2
Reimburse Essential Workers	2				2		2	2			2	2
Increased Pay to Front Line Workers						2						2
Emergency Funding for Crises							2					
Compensation for High Quality Worker												

Policy Action Matrix

The below matrix indicates the most popular policies among key demographics – by total support.

POLICY	EDUCATION			PARENTS		MARITAL STATUS		INCOME		
	HS or Less	Some coll / Voc	Coll Grad+	Child Under 18	Child Under 11	Single	Married	Under \$40K	\$40K-\$75K	\$75K+
Payroll Support During Crisis	2	1	1	1	1	1	1	1	1	1
Expand Child Care to Areas in Need of it			2			2				
Reimburse Essential Workers	1							2	2	
Increased Pay to Front Line Workers		2					2			2
Emergency Funding for Crises										
Compensation for High Quality Worker				2	2					

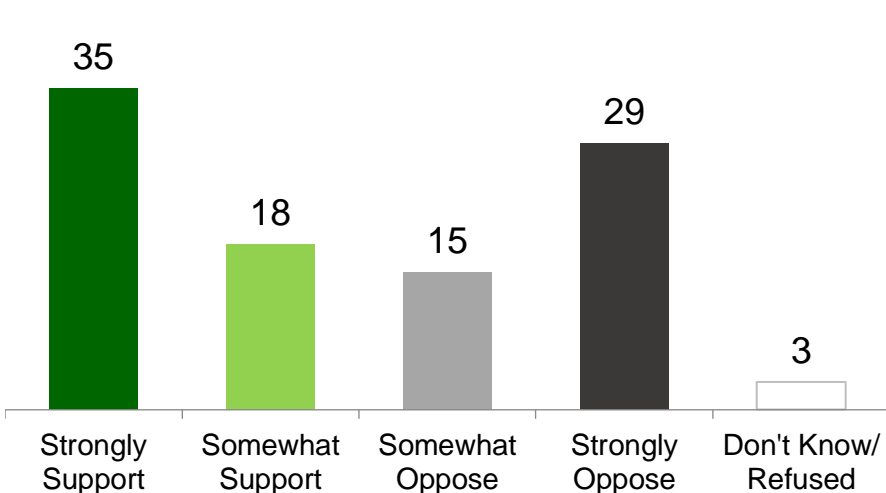
Universal Child Care Wording Test

Currently most child care services are paid for in part by parents. Some communities offer assistance to help parents pay for child care, and many low income parents receive assistance from the federal government...

We see a 10 point increase in support when the phrase “universal” is not used, but rather the funding is described as being “similar to public schools”

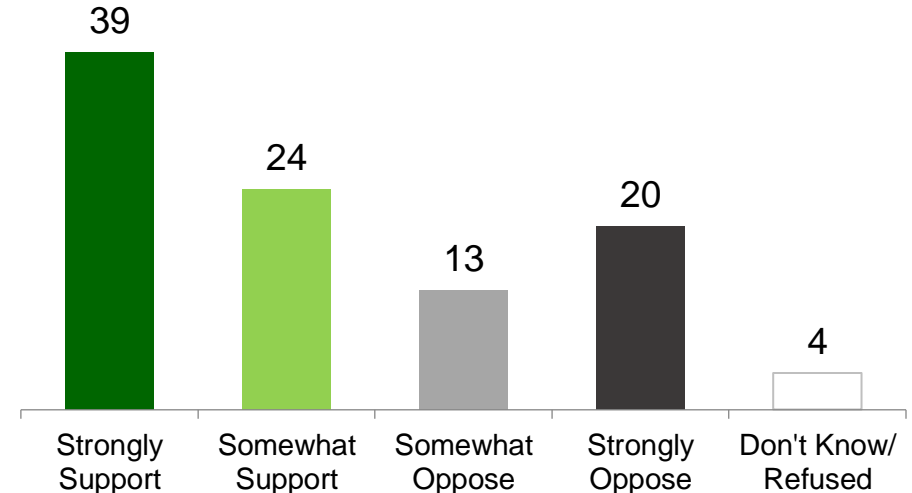
Would you support or oppose switching to a **universal child care system** – where child care is available to all parents who need it and choose to use it without needing to pay for it?

Total Support 53% | Total Oppose 43%



Would you support or oppose switching to a system **similar to public schools** – where child care is available to all parents who need it and choose to use it without needing to pay for it?

Total Support 63% | Total Oppose 33%



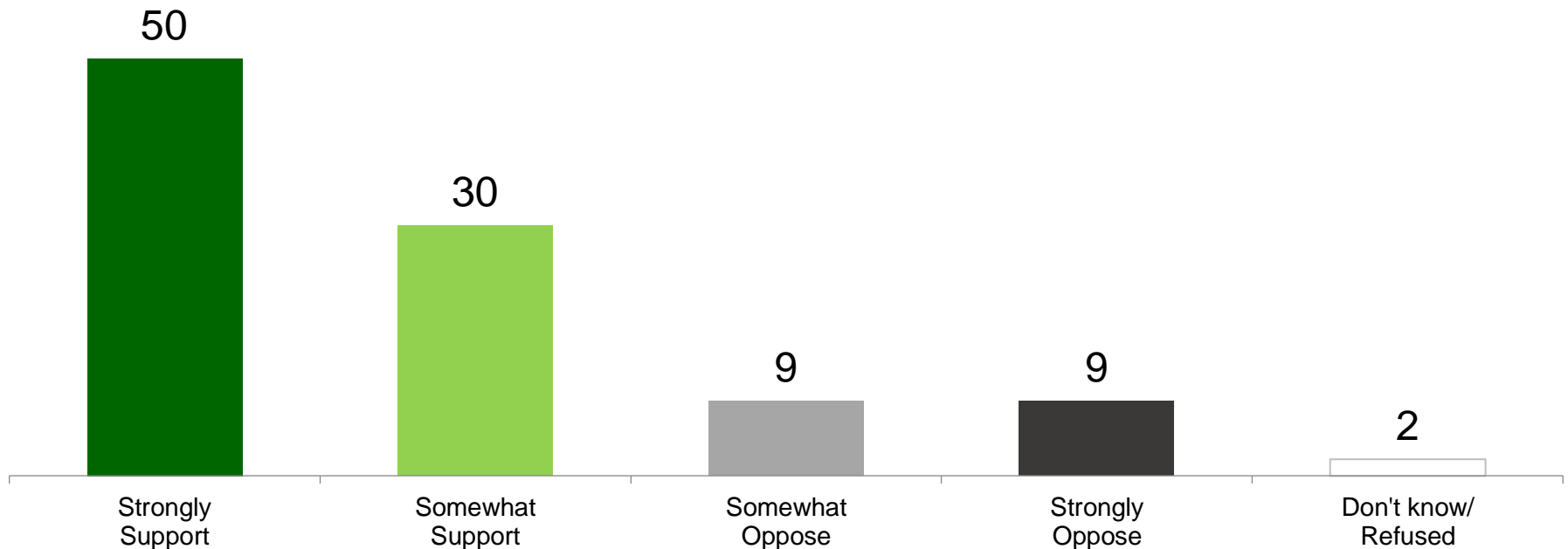
Support for Federal Financial Assistance to the Industry - Initial

One of the many steps that the federal government is taking to address the impacts of the coronavirus pandemic is providing financial assistance for industries directly impacted by the pandemic like the airlines. Many think that the child care industry should also receive federal financial assistance— without which many child care providers may not be able to reopen and parents will be left without child care.

Based on what you currently know, would you say that you support the child care industry receiving targeted financial assistance from the federal government, or would you oppose this use of federal funds?

Support is strongest among Minorities and Millennials with 94% of African American voters, 90% of Hispanic voters, and 91% of millennial voters supportive of financial assistance for the industry

Total Support 80% | Total Oppose 18%



Federal Financial Aid Support – Key Groups

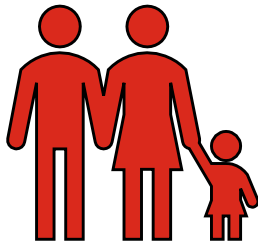
KEY GROUPS		
CHILD CARE ROUTINE IMPACTED	RECENT CHILD CARE USERS	PARENTS WITH CHILDREN UNDER 18
<i>TOTAL SUPPORT</i> 92%	<i>TOTAL SUPPORT</i> 90%	<i>TOTAL SUPPORT</i> 84%
<i>TOTAL OPPOSE</i> 7%	<i>TOTAL OPPOSE</i> 10%	<i>TOTAL OPPOSE</i> 15%

*Child Care Age Parents – Where Do They Stand?

CONCERNS WITH CORONAVIRUS?

“Opening things up too soon.”

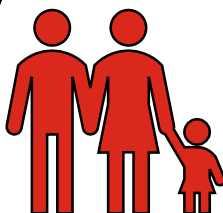
“Safety of family and friends and availability of testing.”



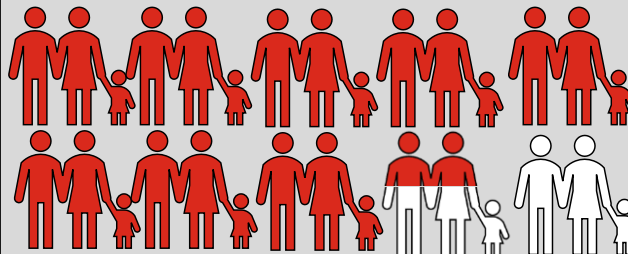
AFTER THE CRISIS IS OVER, HOW WOULD YOU BE IMPACTED IF THE CHILD CARE PROVIDERS IN YOUR COMMUNITY WERE NOT ABLE TO RE-OPEN, OR UNABLE TO HIRE SUFFICIENT STAFF?

“We would have to figure out if we had to stay home or what.”

“I would stay home for a few weeks until they pick back up.”



SUPPORT FOR FEDERAL ASSISTANCE



85%
TOTAL
SUPPORT

TOP POLICIES

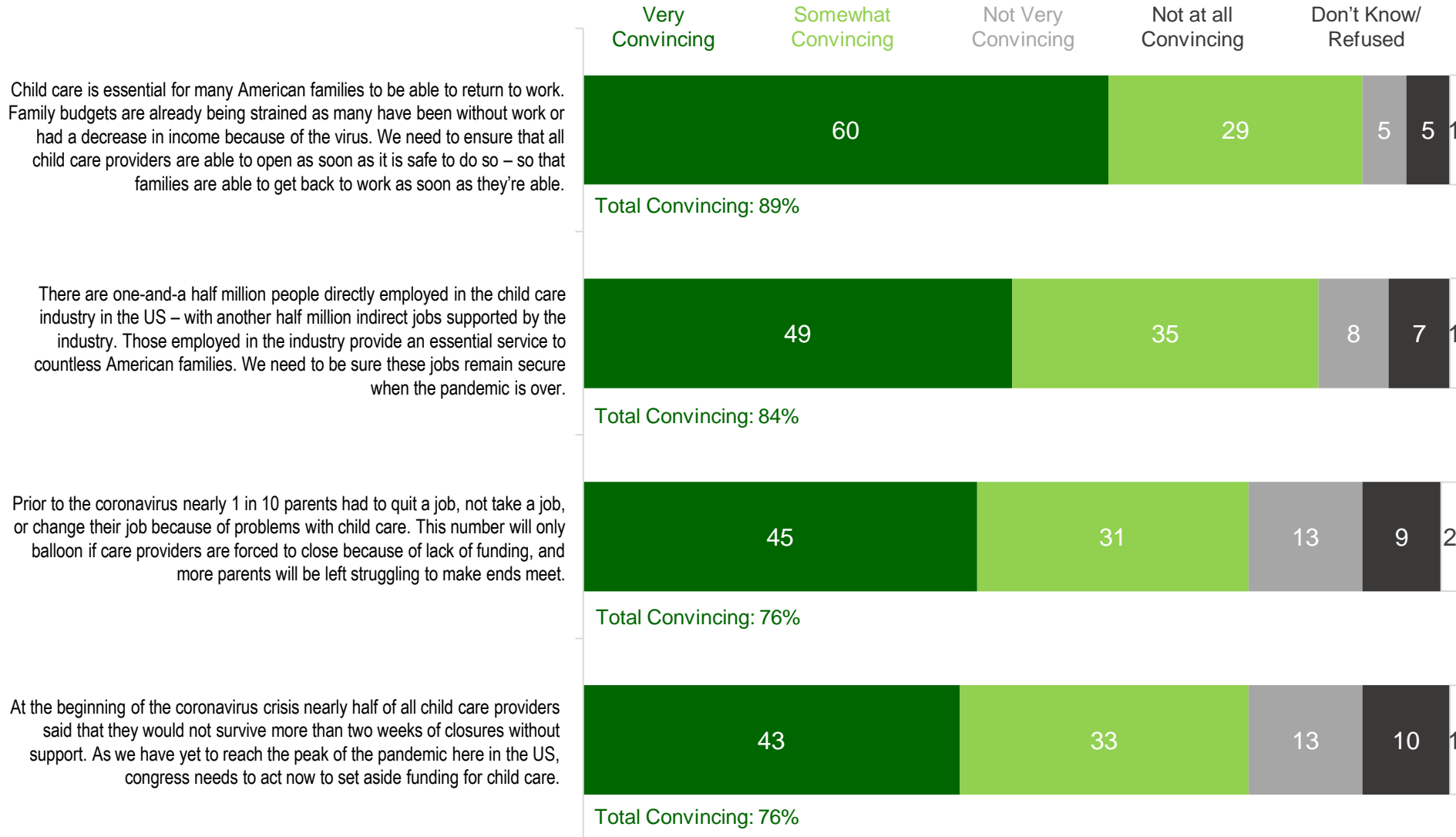
- Provide enough support during the crisis so that current child care providers are able to make payroll and pay other expenses such as rent and utilities
- Funding to provide increased compensation for child care providers in order to ensure a high-quality workforce.

TOP MESSAGES

- Child care is essential for many American families to be able to return to work. Family budgets are already being strained as many have been without work or had a decrease in income because of the virus. We need to ensure that all child care providers are able to open as soon as it is safe to do so – so that families are able to get back to work as soon as they're able.
- There are one-and-a-half million people directly employed in the child care industry in the US – with another half million indirect jobs supported by the industry. Those employed in the industry provide an essential service to countless American families. We need to be sure these jobs remain secure when the pandemic is over.

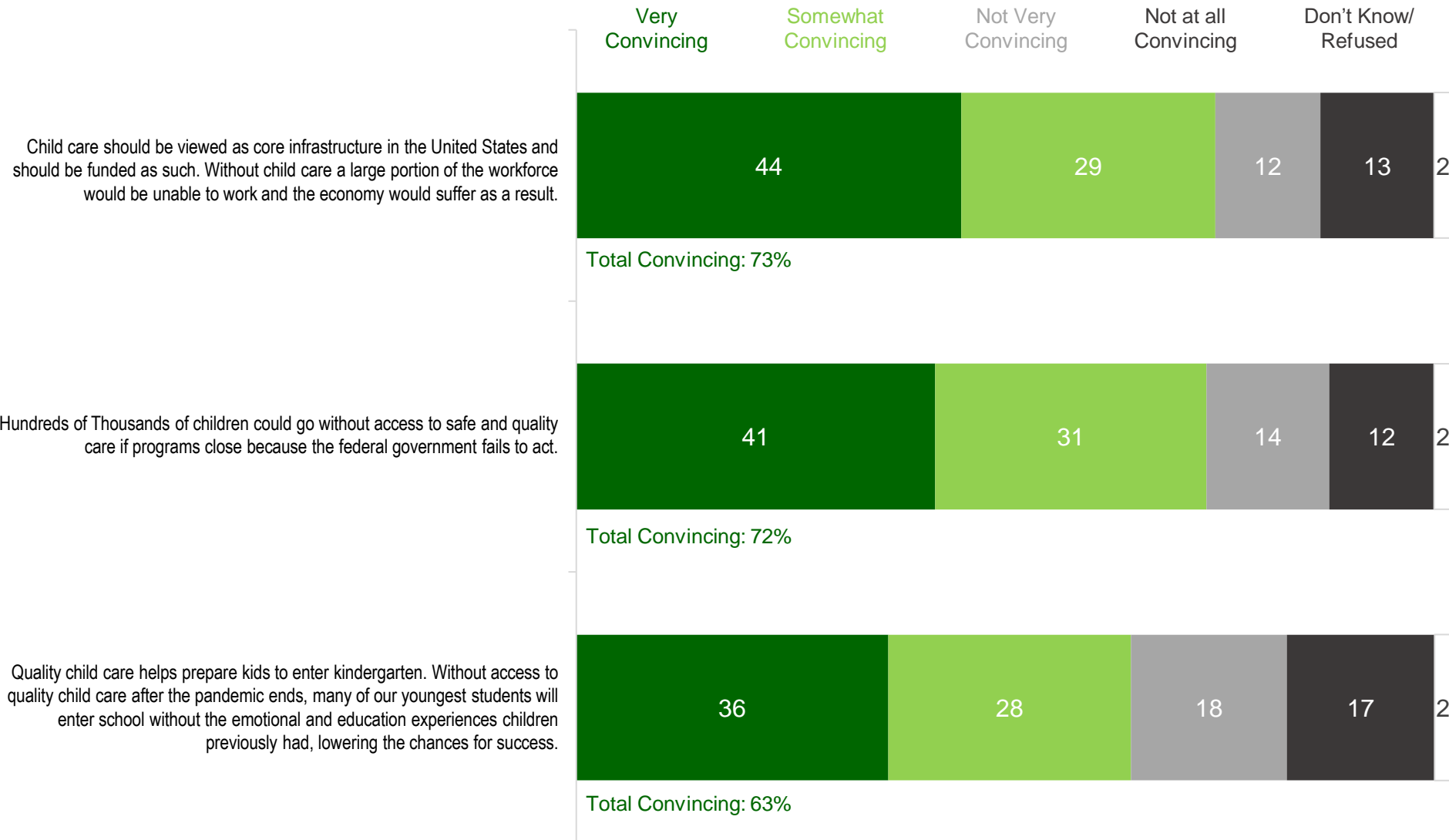
Messaging Statements on Industry Financial Assistance

Next I am going to read you several statements. These arguments have been made by people in favor of the child care industry receiving federal assistance to help combat the drastic effects of the coronavirus pandemic on child care services. For each one, please indicate if you find that argument very convincing, somewhat convincing, not very convincing or not at all convincing.



Messaging Statements on Industry Financial Assistance

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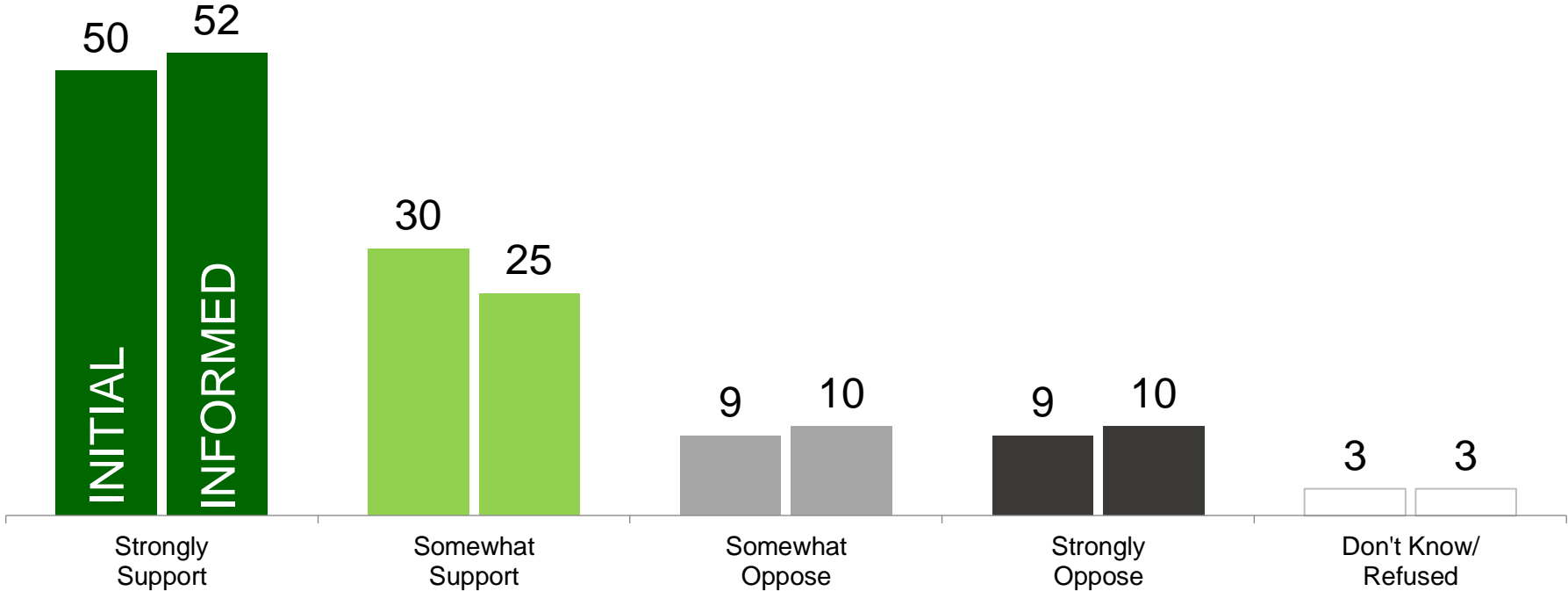


Support for Federal Financial Assistance to the Industry - Informed

Now that you've heard a bit more, would you say that you support the child care industry receiving targeted financial assistance from the federal government, or would you oppose this use of federal funds?

Support remains high even among our strongest **Opposition** voters, with Republicans at 70% support alongside 93% of Democrats and 75% of Independents.

Initial: Total Support 80% | Total Opposed 18%
Informed: Total Support 77% | Total Opposed 20%
MOVEMENT: Toward Support 14% | Toward Opposed 14%



Top Messaging - Overall

Most Popular

➔ Child care is essential for many American families to be able to return to work. Family budgets are already being strained as many have been without work or had a decrease in income because of the virus. We need to ensure that all child care providers are able to open as soon as it is safe to do so – so that families are able to get back to work as soon as they're able.

➔ There are one-and-a half million people directly employed in the child care industry in the US – with another half million indirect jobs supported by the industry. Those employed in the industry provide an essential service to countless American families. We need to be sure these jobs remain secure when the pandemic is over.

Most Persuasive

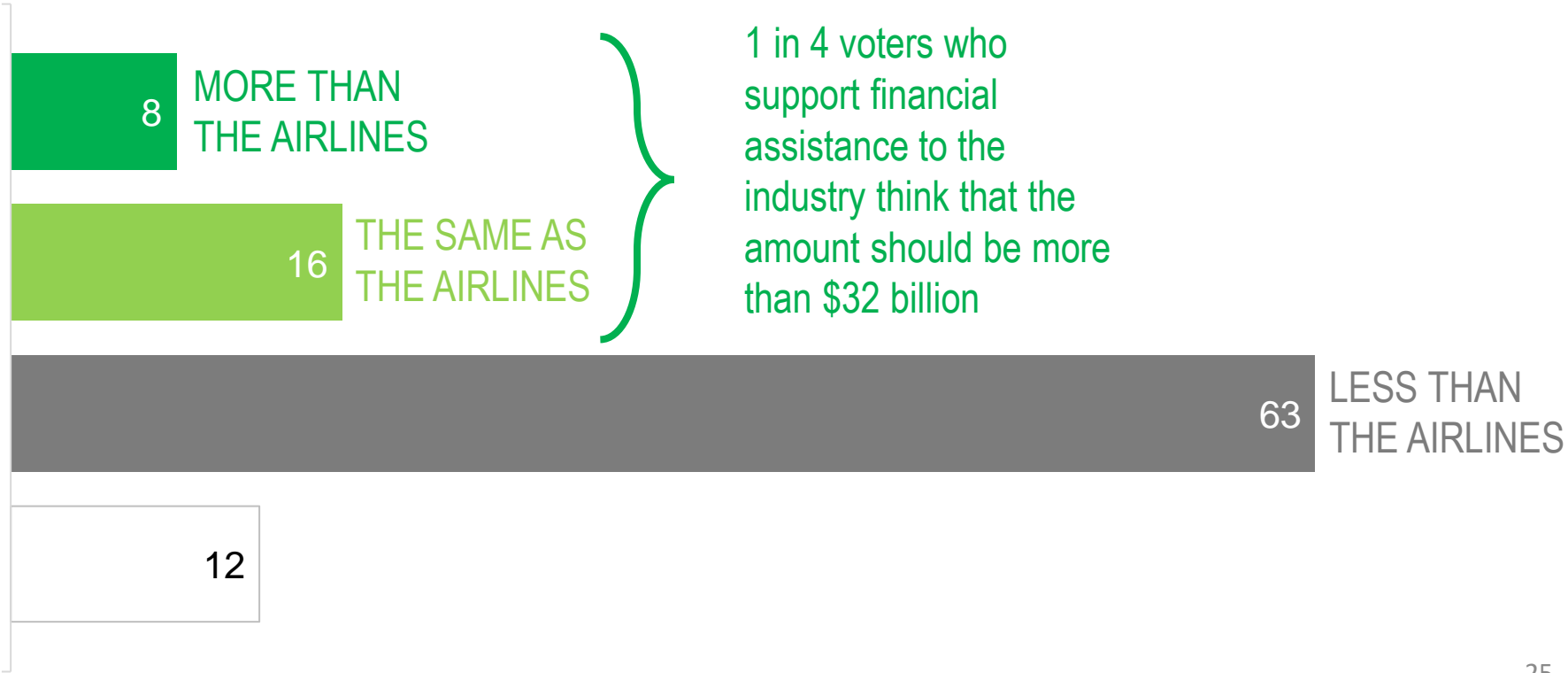
➔ At the beginning of the coronavirus crisis nearly half of all child care providers said that they would not survive more than two weeks of closures without support. As we have yet to reach the peak of the pandemic here in the US, congress needs to act now to set aside funding for child care.

➔ Child care should be viewed as core infrastructure in the United States and should be funded as such. Without child care a large portion of the workforce would be unable to work and the economy would suffer as a result.

Federal Financial Assistance – Among Supporters

[Among Post Ballot Supporters] And how much in federal financial assistance do you think the child care industry should receive? For reference, the airline industry has been given \$32 billion dollars so far in financial assistance to help with the effects from the coronavirus.

[among those who said they do not know how much...] Do you think that the child care industry should receive more than the airline industry, the same amount, or less than the airline industry?



Expanded Methodology

This survey was jointly commissioned by SCAN and CCAoA and was conducted from April 11th– 15th, 2020 by TargetPoint Consulting and GQR. 1,200 interviews were conducted from a national sample of registered voters. The margin of error is +/- 2.8%. Data were collected using a probability sample of 1 million voters. Post-data collection weighting was done using age within gender, race within region, education, and political party. Weighting parameters sourced from the probability sample of 1 million registered voters. Screening on the survey took place and terminated respondents if they self-identified as not being registered to vote. This survey had a 6.2% response rate using the AAPOR RR4 calculation. All interviews were collected using live-interviewer phone interviews, 40% of interviews conducted on cell phones and 60% with voters on landline phones. For additional questions and inquiries please contact Michael Meyers or Mckenna Erickson at TargetPoint Consulting at 703.535.8505, or via email at mmeyers@targetpointconsulting.com and merickson@targetpointconsulting.com

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insights & action

TargetPoint 