MAVEN CLINIC: QUANTITATIVE SURVEY OF PARENTS

QUANTITATIVE RESEARCH REPORT OF FINDINGS

AUGUST 2020

TABLE OF CONTENTS

RESEARCH OBJECTIVES

Maven partnered with Wakefield Research to understand the following key research objectives:

- Identify how certain parents are of their plans for their children's daycare and schooling in the Fall.
- Assess the factors driving parents' decision-making process for their children.
- Determine how challenging parents find the decisions for the Fall compared to other key decisions related to their children.

RESEARCH METHODOLOGY

Wakefield Research conducted a quantitative opinion research study between July 27th and July 31st, 2020 using an email invitation and an online survey instrument.

In total, Wakefield surveyed 1,000 US parents ages 18+ with a child or children currently in their care. The margin of error for this study is +/- 3.1 percentage points at the 95% confidence level. Margins are slightly larger for sub-groups.

KEY FINDINGS

KEY FINDINGS

Most parents do not have a 100% clear plan about their children's childcare and education in the Fall.

More than 3 in 5 (63%) parents do not have a totally clear plan. This is the case for a larger share of parents with children under 5 years old (72%), while parents with older children between 11 and 17 feel more certain about their Fall arrangements, with just over 2 in 5 (44%) half having a totally clear plan.

Neary 2 in 5 (38%) parents say they will definitely keep their children at home in the Fall, while only 12% will definitely send their children out to childcare or school. 15% of parents have no idea at all.

KEY FINDINGS

The majority of working parents do not feel they are receiving high levels of support from their employer as they navigate childcare decisions for the Fall.

Most parents (57%) indicate that their employer could be doing more as they rate the support from their employer as 7 or less on a 0-10 scale. Nearly a quarter (24%) rate the support as 4 or less.

When faced with the choice of flexible working hours or free mental health support from their employer, parents overwhelmingly believe that flexible working hours would be more helpful, indicating that the challenges of navigating home-bound children are the priority for parents rather than support their own mental health.

KEY FINDINGS

The uncertainty surrounding childcare plans for the Fall is reflected in elevated levels of anxiety among parents.

Nearly two-thirds (64%) report feeling anxious (between 6 and 10 on a 0-10 scale), while 42% are very anxious (8-10). More parents in the Northeast report being very anxious (53%), compared to 38% of parents in the Midwest.

Spouses and significant others are the key influencers of parents' decisions about their children's arrangements for the Fall, outweighing government, school and daycare authorities.

The influence of spouses and significant others indicates that families are making decisions based on their own interpretation of conditions rather than solely following guidance from government and education officials. "Other parents" are the least influential group when it comes to the decision-making.

KEY FINDINGS

Factors related to children's well-being are the biggest concern when it comes to decisions about childcare/schooling in the Fall.

The risk of COVID-19 infection is the biggest concern (45%), followed by children's education (25%) and mental health (11%), while factors directly related to parents' ability to work (6%) and parents' own mental health (5%) rate lowest.

Deciding whether to keep children home or not in the Fall is a much bigger challenge than making decisions about the appropriate amount of screen time for children or whether to visit family and friends in person.

The decisions about keeping children home or not are more challenging for around 6 in 10 parents, compared to the decisions about screen time and visiting family and friends.

DETAILED RESEARCH FINDINGS

PLANS FOR THE FALL

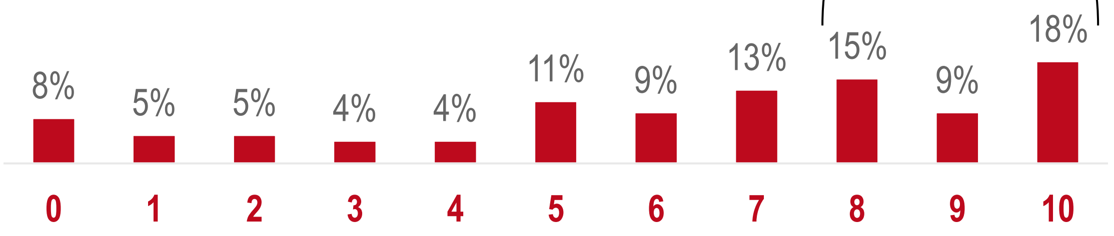
MAVEN

MOST PARENTS ARE ANXIOUS ABOUT PLANS FOR THE FALL

Uncertainty surrounding Fall plans is also reflected in anxiety levels. Nearly two-thirds (64%) report feeling anxious (between 6 and 10 on a 0-10 scale), while 42% are very anxious (8-10). Anxiety levels also vary by region and the age of parents' youngest child.

LEVEL OF ANXIETY REGARDING PLANS FOR CHILDCARE THIS FALL
N=1,000

42% of parents have high levels of anxiety, but those in the Northeast are highest with 53%.



LEVEL OF ANXIETY REGARDING PLANS FOR CHILDCARE THIS FALL	AGE OF YOUNGEST CHILD			REGION			
	LT 5 *n=325*	5-10 *n=368*	11-17 *n=306*	N'EAST *n=163*	SOUTH *n=379*	MID-WEST *n=213*	WEST *n=245*
Very Anxious (8-10)	37%	50%	37%	53%	41%	38%	40%
Not at all / not very anxious (0-3)	19%	18%	29%	17%	23%	27%	19%

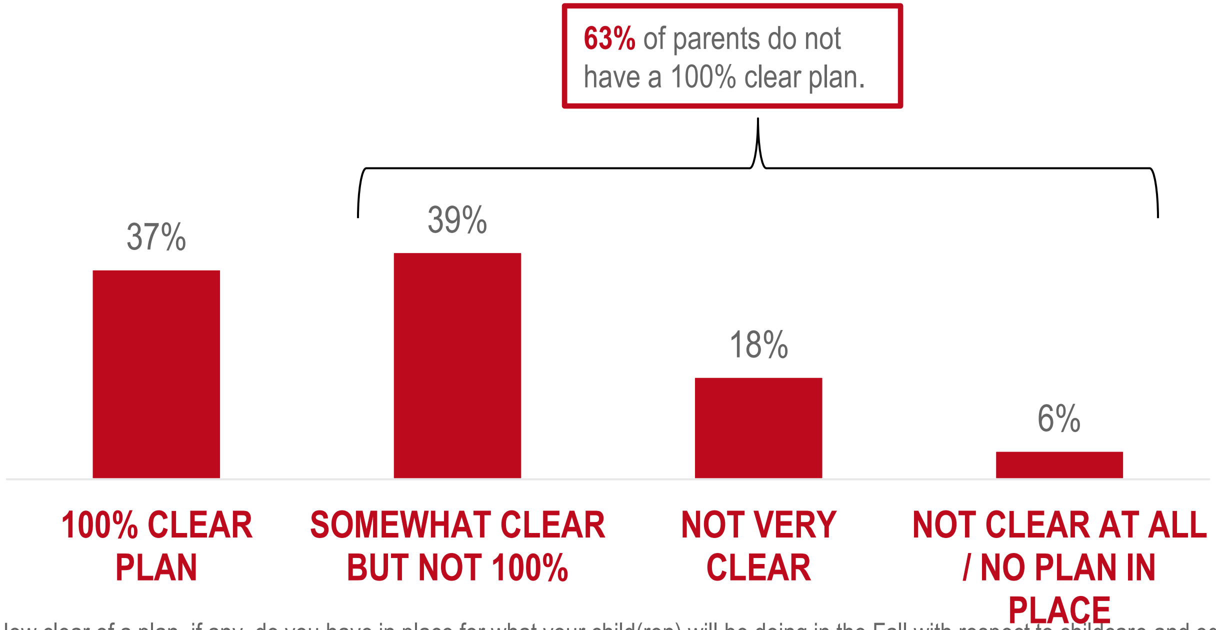
To begin with, how would you rate your own level of anxiety when it comes your plans for childcare this Fall? **Q1**

MANY PARENTS HAVE NO CLEAR PLAN FOR THE FALL

More than 3 in 5 (63%) parents do not have a totally clear plan for their children's arrangements in the Fall. Parents living in cities and those with older children between 11 and 17 feel more certain about their Fall plans.

PLAN IN PLACE FOR WHAT CHILD(REN) WILL BE DOING IN THE FALL WITH RESPECT TO CHILDCARE AND EDUCATION

N=1,000



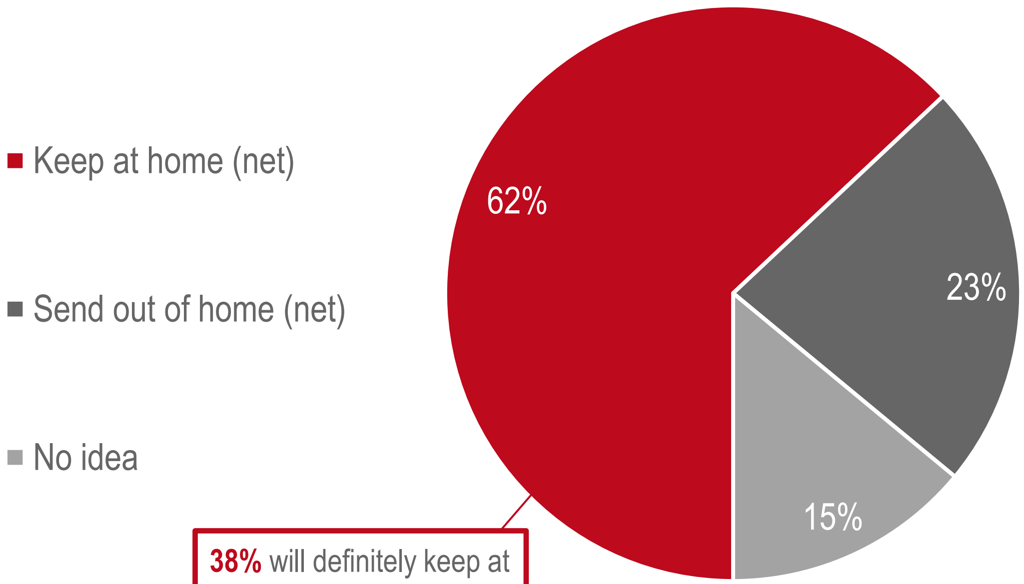
PLAN IN PLACE FOR WHAT CHILD(REN) WILL BE DOING IN THE FALL WITH RESPECT TO CHILDCARE AND EDUCATION	AGE OF YOUNGEST CHILD			AREA		
	LT 5 *n=325*	5-10 *n=368*	11-17 *n=306*	CITY *n=453*	SUB-URBAN *n=359*	RURAL *n=188*
Plan (100% clear or somewhat clear)	72%	80%	78%	85%	68%	73%
No plan (not very clear or not clear at all)	28%	20%	22%	15%	32%	27%

How clear of a plan, if any, do you have in place for what your child(ren) will be doing in the Fall with respect to childcare and education? **Q2**

MOST PARENTS PLAN ON KEEPING CHILDREN AT HOME

The majority of parents (62%) plan on keeping their children home, although only 38% are definite about this. Fifteen percent of parents still have no idea at all.

WHERE PARENTS WILL KEEP THEIR CHILD(REN)
N=1,000



38% will definitely keep at home, while **24%** will probably keep at home

WHERE PARENTS WILL KEEP THEIR CHILD(REN)	AREA		
	CITY *n=453*	SUBURBAN *n=359*	RURAL *n=188*
Keep at home (net)	79%	50%	42%
Send out of home (net)	12%	31%	36%

Only **12%** of city parents plan on sending their children out of home.

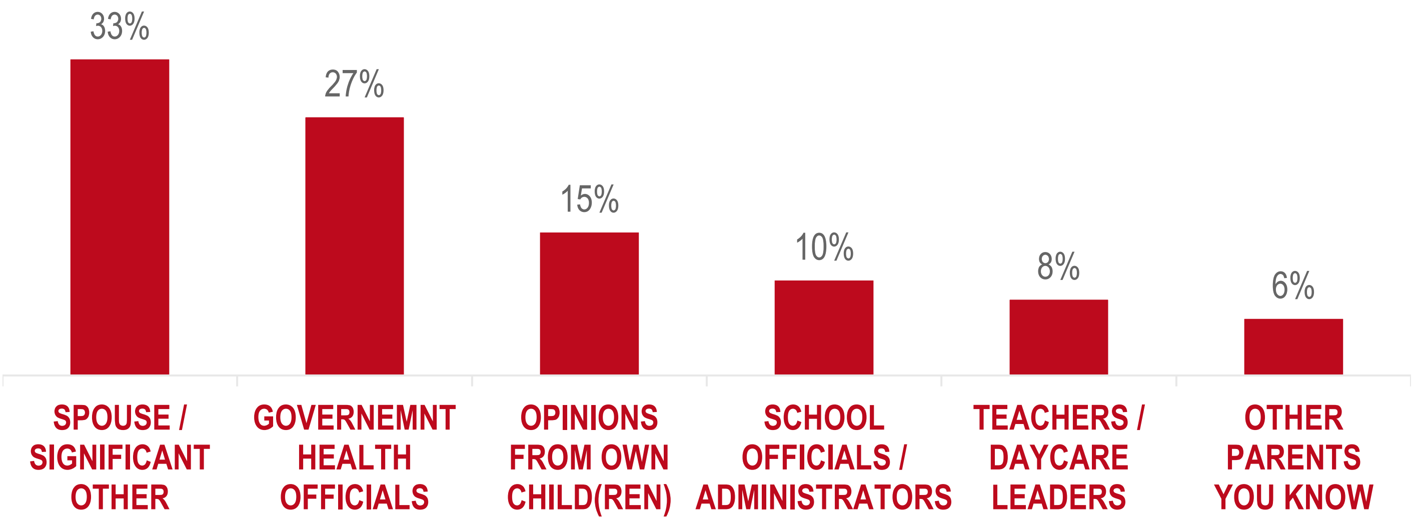
This Fall, if schools and daycares are open in your area, will you likely keep your child(ren) at home or will you send them out of your home to school, daycare, or other such arrangements? **Q3**

DECISION INFLUENCERS

SPOUSES/PARTNERS ARE MORE INFLUENTIAL THAN OFFICIALS WHEN IT COMES TO DECISIONS ABOUT CHILDREN

Parents' decisions about their children during COVID-19 are most influenced by spouses/significant others, indicating that choices are made at the family level rather than solely taking guidance from school or government officials. However, the influence of spouses declines as the age of the youngest child rises.

INFLUENCE OF GROUPS ON DECISIONS MADE REGULARLY FOR CHILD(REN) DURING COVID-19 OUTBREAK
TOP RANKED RESPONSE, N=1,000



	AGE OF YOUNGEST CHILD		
INFLUENCE OF GROUPS ON DECISIONS MADE REGULARLY FOR CHILD(REN) DURING COVID-19 OUTBREAK *TOP RANKED RESPONSE*	**LT 5** *n=325*	**5-10** *n=368*	**11-17** *n=306*
A spouse / significant other	40%	31%	29%
Opinions from your own child(ren)	11%	16%	17%
School officials & administrators	7%	11%	12%

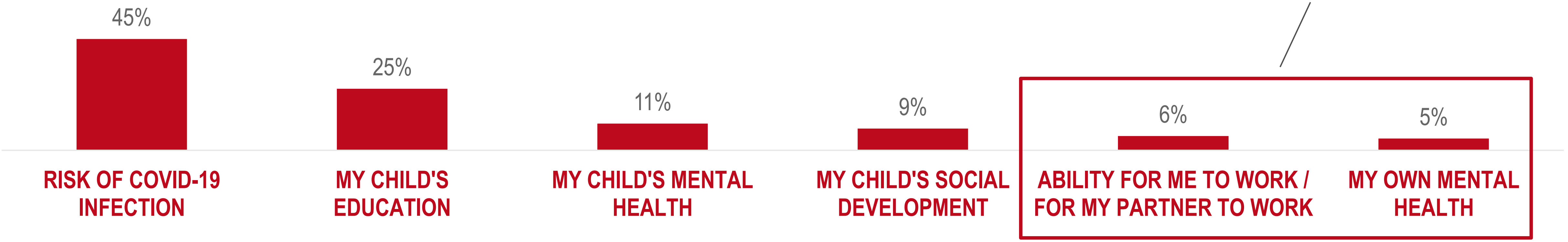
How influential are each of the following groups on the decisions you make regarding your child(ren) during this COVID-19 outbreak? **Q4**

CHILDREN'S HEALTH COMES FIRST

Factors related to children's well-being are the biggest concern when it comes to making decisions about childcare/schooling in the Fall, with the risk of COVID-19 infection and children's education the top two concerns.

#1 CONCERN INFLUENCING DECISIONS MADE ABOUT CHILDCARE AND SCHOOLING THIS FALL
N=1,000

Parents put their children's well-being ahead of their own, with parents' ability to work (6%) and their own mental health (5%) ranking lowest.

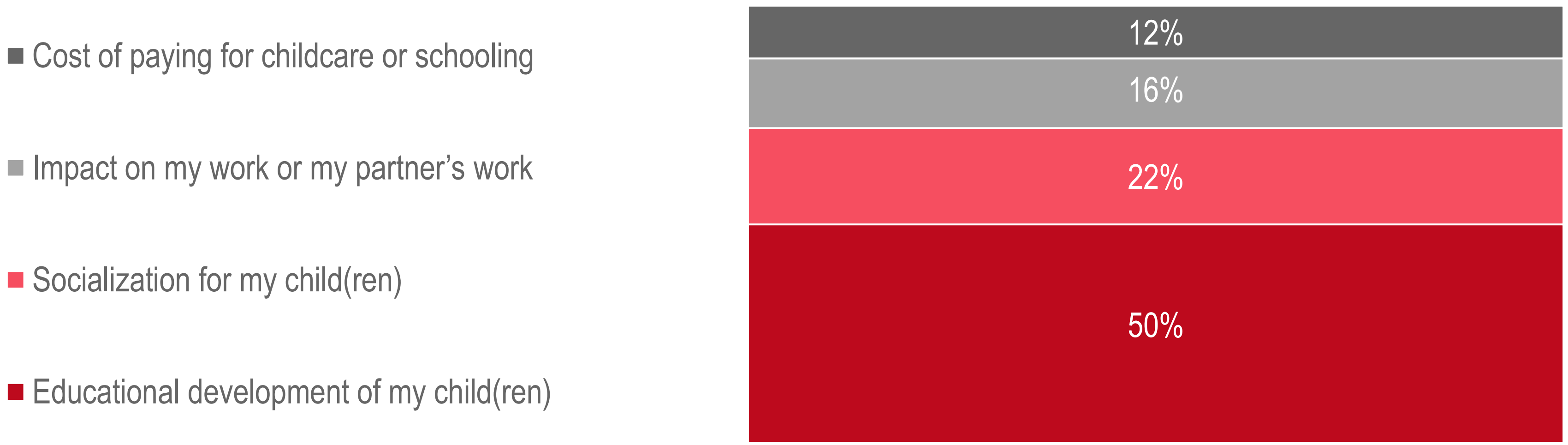


From the list below, what is the #1 concern that is influencing the decisions you make about childcare and schooling this Fall? **Q6**

FINANCIAL FACTORS NOT A MAJOR INFLUENCE ON DECISIONS FOR CHILDREN IN FALL

Aside from COVID-19 infection risk, the development of their children is the major factor guiding parents' decisions about plans for the Fall.

INFLUENCE OF FACTORS ON MAKING DECISIONS ABOUT CHILDCARE AND EDUCATION FOR THE FALL
TOP RANKED RESPONSE, N=1,000

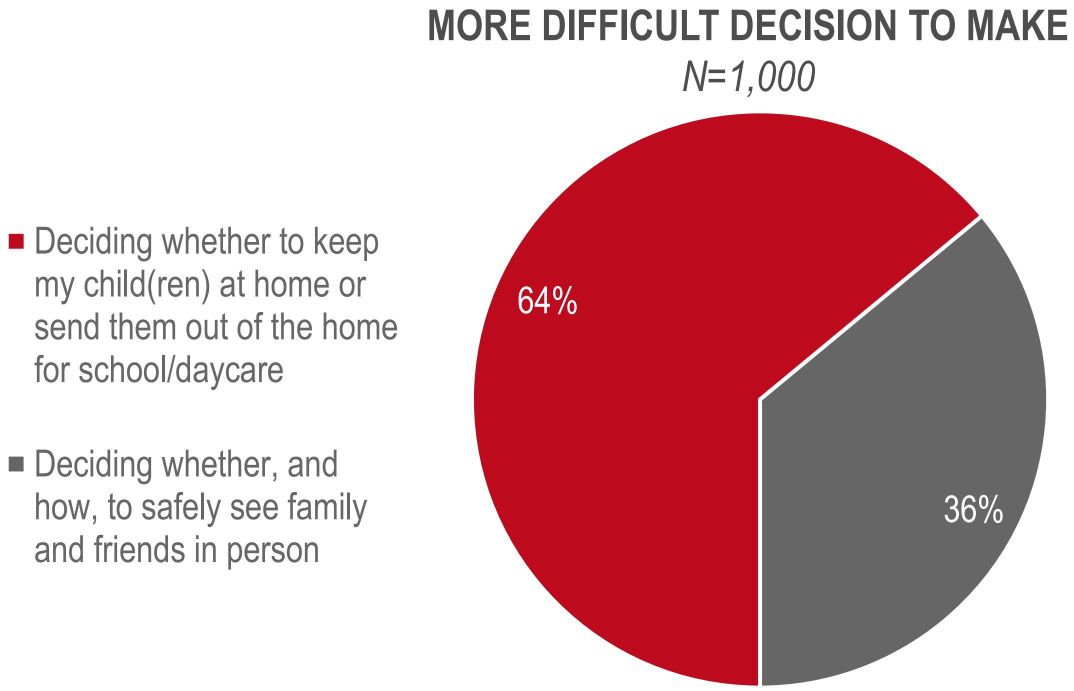


Parents' concerns about work and costs of school/childcare lag factors related to their children's development.

Other than the risk and impact of infection from COVID-19, how influential are these other factors when it comes to making decisions about childcare and education for the Fall? **Q5**

DECISION ABOUT CHILDREN'S SCHOOLING AND DAYCARE IS MORE CHALLENGING THAN MEETING FAMILY AND FRIENDS

More than 3 in 5 (64%) parents find deciding on whether to keep children home for schooling/daycare this year as more challenging than figuring out whether, and how, to meet family and friends in person.



MORE DIFFICULT DECISION TO MAKE	AREA			PARENT	
	CITY *n=453*	SUB-URBAN *n=359*	RURAL *n=188*	MOTHER *n=552*	FATHER *n=448*
Deciding whether to keep my child(ren) at home or send them out of the home for school/daycare	61%	64%	70%	68%	59%
Deciding whether, and how, to safely see family and friends in person	39%	36%	30%	32%	41%

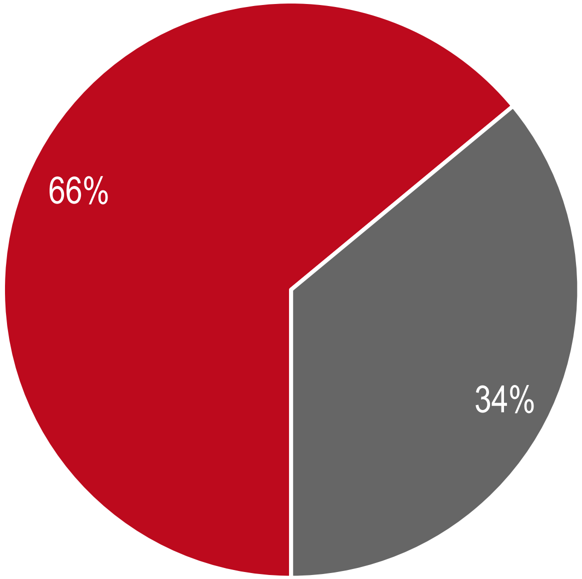
Rural parents find the decision particularly challenging, coinciding with them being less likely to have a plan for the Fall.

Thinking about this year, which of the following do you feel is a more difficult decision to make? **Q7**

DECISION ABOUT CHILDREN'S SCHOOLING AND DAYCARE IS ALSO MORE CHALLENGING THAN SCREEN TIME ALLOWANCE

Deciding on Fall's daycare and schooling arrangements is also more challenging for nearly 2 in 3 (66%) parents than figuring out the right amount of screen time for their children.

BIGGER CHALLENGE
N=1,000



	AGE OF YOUNGEST CHILD		
BIGGER CHALLENGE	**LT 5** *n=325*	**5-10** *n=368*	**11-17** *n=306*
Deciding whether to keep my child(ren) at home or send them out of the home for school/daycare	65%	62%	72%
Deciding how much screen time is appropriate for my child(ren)	35%	38%	28%

Again, thinking about this year, which of the following is a bigger challenge? **Q8**

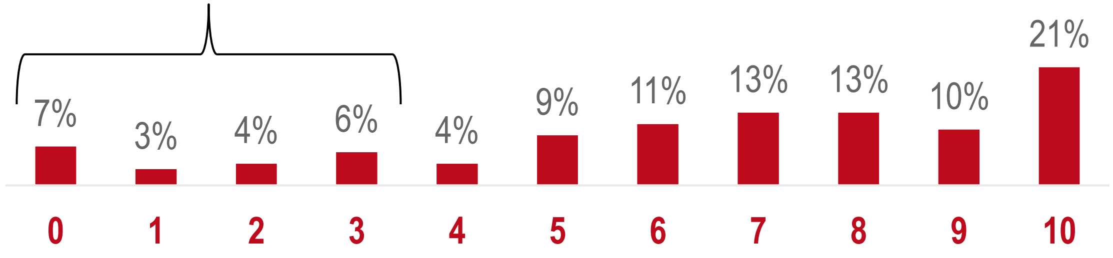
SUPPORT FROM EMPLOYERS

MOST PARENTS DO NOT FEEL FULLY SUPPORTED BY THEIR EMPLOYER

The majority (57%) of working parents do not feel fully supported by their employer as they navigate childcare decisions for the Fall, with most parents grading support as less than 8 on a 0-10 point scale. One in 5 parents feel they are receiving little support from their employer (0-3). Parents with children under 5 feel less supported than parents with older children.

LEVEL OF EMPLOYER SUPPORT WHILE NAVIGATING CHILDCARE DECISIONS FOR THE FALL
AMONG THOSE WHO ARE EMPLOYED, n=752

20% of parents feel they are receiving little support from their employer.



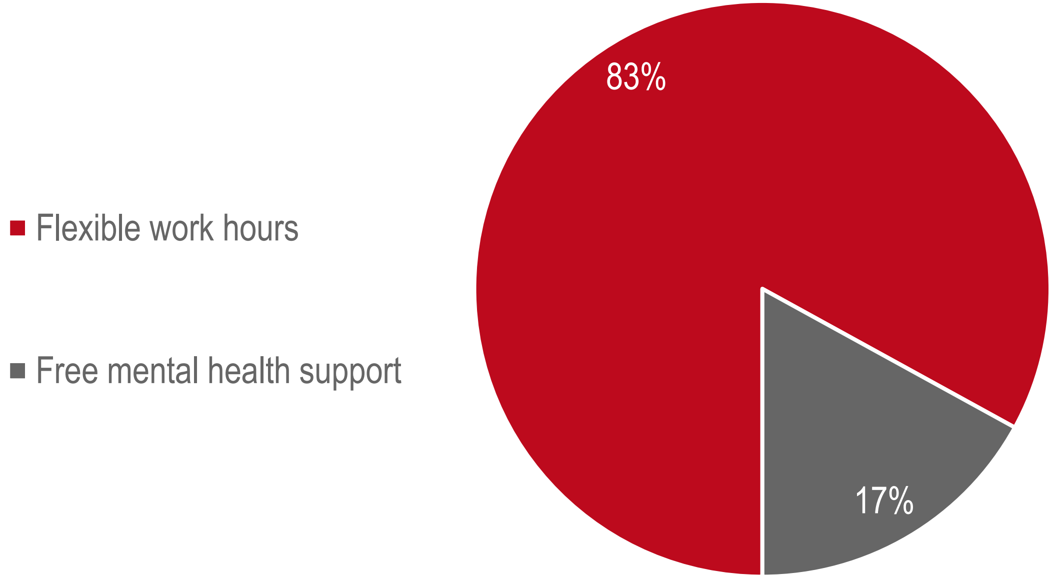
LEVEL OF EMPLOYER SUPPORT WHILE NAVIGATING CHILDCARE DECISIONS FOR THE FALL *AMONG THOSE EMPLOYED*	**AGE OF YOUNGEST CHILD**			**AREA**		
	LT 5 *n=218*	**5-10** *n=295*	**11-17** *n=239*	**CITY** *n=390*	**SUB-URBAN** *n=252*	**RURAL** *n=110*
Supported (8-10)	33%	47%	48%	51%	35%	34%
Not supported (0-3)	23%	16%	21%	14%	27%	26%

Among those who are employed: How supported, if at all, do you feel by your employer as you navigate childcare decisions for the Fall? **Q9**

FLEXIBLE WORKING HOURS SEEN AS MORE HELPFUL THAN MENTAL HEALTH SUPPORT

The vast majority of working parents would rather their employer provide flexible working hours than access to free mental health support. Similar to earlier findings, the result points to parents putting their children's needs ahead of their own mental health.

MOST HELPFUL TO RECEIVE FROM EMPLOYER TO FEEL SUPPORTED
AMONG THOSE WHO ARE EMPLOYED, n=752



MOST HELPFUL TO RECEIVE FROM EMPLOYER TO FEEL SUPPORTED *AMONG THOSE WHO ARE EMPLOYED*	**NUMBER OF CHILDREN AT HOME**		
	1 *n=248*	**2** *n=331*	**3 OR MORE** *n=173*
Flexible work hours	87%	81%	83%
Free mental health support	13%	19%	17%

Regardless of the number of children parents have at home, flexible work hours consistently receives over 80%.

Among those who are employed: Which of the following would be most helpful for you to receive from your employer to feel supported as you navigate work and childcare? **Q10**

APPENDIX

GENDER, REGION, AGE, AND AREA

GENDER *N=1,000*	%
Male	45%
Female	55%

REGION *N=1,000*	%
Northeast	16%
South	38%
Midwest	21%
West	25%

AGE *N=1,000*	%
18-23	3%
24-39	49%
40-55	43%
56-74	5%
75+	-

AREA *N=1,000*	%
City / urban area	45%
Suburbs	36%
Rural area	19%

What is your gender please? / What is your age? / What state do you live in currently? / Do you live in the city, the suburbs, or in a rural area? **QA/QB/QC/QQ**

EDUCATION AND INCOME

EDUCATION *N=1,000*	**%**
Grade school	4%
Some high school	6%
Graduated from high school or equivalent	24%
Some college (No Assoc. or Bachelor's degree)	15%
Associate degree	11%
Bachelor's degree	24%
Graduate or post-graduate work	15%

INCOME *N=1,000*	**%**
Less than $35,000	16%
$35,000-$49,999	10%
$50,000-$74,999	17%
$75,000-$99,999	15%
$100,000-$149,999	25%
$150,000 or more	17%

What is the highest level of formal education you have completed? / What was your total household income for last year? **QD/QP**

EMPLOYMENT STATUS, MARITAL STATUS, AND RELATIONSHIP

EMPLOYMENT STATUS *N=1,000*	**%**
Work full-time	62%
Work part-time	13%
Unemployed	6%
Retired	3%
Stay-at-home / do not work	16%

MARITAL STATUS *N=1,000*	**%**
Married or living as married	79%
Widowed	3%
Divorced	6%
Separated	1%
Never married	11%

RELATIONSHIP *AMONG THOSE WHO ARE NOT MARRIED, n=208*	**%**
Yes	56%
No	44%

What is your employment status? / What is your current marital status? / Among those who are not married: Are you currently in a committed romantic relationship? **QO/QM/QN**

HISPANIC AND RACE

HISPANIC *N=1,000*	**%**
Yes	22%
No	78%

RACE *N=1,000*	**%**
Asian	8%
African American	12%
White or Caucasian	77%
Native American	1%
Other	2%

Are you of Hispanic, Latino, or Spanish descent? / What race or ethnic group are you a member of? **QK/QL**

CHILDREN, HOUSEHOLD SIZE, AND CHILDREN IN HOUSEHOLD

CHILDREN *N=1,000*	**%**
0	1%
1	22%
2	38%
3+	40%

HOUSEHOLD SIZE *N=1,000*	**%**
2	4%
3	22%
4+	74%

CHILDREN IN HOUSEHOLD *N=1,000*	**%**
1	32%
2	41%
3+	27%

How many children have you had? / Including yourself, how many people currently live in your household? / How many children under the age of 18 are currently living in your home? **QE/QF/QG**

AGES OF CHILDREN AND AGE OF YOUNGEST CHILD

AGES OF CHILDREN *N=1,000*	%
Less than 1 year old	5%
1 year old	6%
2 years old	10%
3 years old	10%
4 years old	11%
5 years old	12%
6 years old	11%
7 years old	13%
8 years old	12%
9 years old	11%
10 years old	17%
11 years old	13%
12 years old	14%
13 years old	11%
14 years old	10%
15 years old	11%
16 years old	10%
17 years old	11%

AGE OF YOUNGEST CHILD *N=1,000*	%
Less than 1 year old	5%
1 year old	6%
2 years old	9%
3 years old	7%
4 years old	6%
5 years old	6%
6 years old	6%
7 years old	6%
8 years old	5%
9 years old	5%
10 years old	9%
11 years old	5%
12 years old	6%
13 years old	5%
14 years old	4%
15 years old	4%
16 years old	3%
17 years old	3%

What are the ages of your children under 18 who live at home? / What is the age of your youngest child who lives at home? **QH/QI**

EDUCATION LEVELS OF CHILDREN

EDUCATION LEVELS OF CHILDREN *N=1,000*	**%**
Daycare/Not in school	27%
Pre-School	10%
Kindergarten	13%
Elementary School	32%
Middle School	12%
High School	29%

Which education level(s) are your children currently at? **QJ**

MAVEN

WAKEFIELD

WAKEFIELDRESEARCH.COM