



# WISCONSIN EMPLOYER PERCEPTIONS OF EARLY CARE AND EDUCATION

COMPREHENSIVE RESEARCH FINDINGS

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Wisconsin Department of  
Children and Families





This report encompasses all data from Project Growth’s 2021 Wisconsin Employer Perceptions of Early Care and Education survey. A brief summary of major findings can be downloaded at [projectgrowth.wi.gov](https://projectgrowth.wi.gov).

Contents

All Survey Findings .....3

    Awareness of Parenting Needs ..... 3

    Impact of COVID-19 ..... 5

    Attitudes about the Organization’s Role in Supporting  
    Employees’ Parenting and Child Care Needs..... 7

    Attitudes about ECE’s Role in the Wisconsin  
    Economy and Workforce ..... 11

    Perceived Benefits of Supporting Employees’  
    Child Care and Parenting Needs..... 13

    Perceived Barriers to Supporting Employees’  
    Child Care and Parenting Needs..... 15

    Current Supports Offered ..... 18

    Factors that Would Increase Likelihood of Investment..... 23

Research Audience .....24

    Participant Totals..... 24

    Industry ..... 25

    Organization Size..... 26

    Region..... 26

    Roles..... 27



# All Survey Findings



In the fall of 2021, DCF surveyed nearly 1,000 Wisconsin employers<sup>1</sup> from every county in the state, across a wide range of industries. The goal was to better understand their perceptions about early care and education for children between birth and age 5, as well as what barriers businesses face in supporting employees' child care needs. Gaining insight into their perspectives can help us connect Wisconsin business owners with the child care information and community-based resources they—and their employees—need to thrive.

## Awareness of Parenting Needs

- The majority of participants said **they are very aware of their employees' parenting and child care needs** (62%). Another 35% said they are somewhat aware, and 3% said they are not aware.
- Respondents from **smaller organizations reported higher awareness levels** than those working at larger organizations:
  - ▶ 5-9 employees: 77% very aware
  - ▶ 10-19 employees: 70% very aware
  - ▶ 20-49 employees: 64% very aware
  - ▶ 50-99 employees: 52% very aware
  - ▶ 100-249 employees: 47% very aware
  - ▶ 250-499: 53% very aware
  - ▶ 500-999: 29% very aware
  - ▶ 1,000 or more: 28% very aware

<sup>1</sup> Research conducted by KW2 was fielded in November-December 2021 and included 979 responses.

- Certain industry sectors also had higher or lower reported levels of awareness than average:
  - ▶ **Education and Health Services** (71% very aware) participants reported significantly higher levels of awareness. Note: Many child care providers selected “Other” as their industry sector, though some child care providers may have also selected “Education and Health Services.”
  - ▶ **Manufacturing** (39% very aware) and **Financial Activities** (54%) participants had significantly lower levels of reported awareness.
  
- Role also makes a difference in reported levels of awareness about employees’ parenting needs:
  - ▶ 71% of those who said they were the **ultimate decision-maker** for employee benefits also said they are very aware of employees’ needs, statistically higher than average.
  - ▶ While human resources professionals (sole focus) were not more likely than average to report they are very aware of employees’ needs, those who said **HR is part of their responsibilities** were significantly more likely than average (65%) to say they are very aware.
  
- The majority of participants (58%) **gather information about their employees’ needs informally**, through conversations between employees and their managers and supervisors or human resources team. More formalized methods of collecting feedback include:
  - ▶ Formal feedback or listening sessions: 15%
  - ▶ Employee surveys: 11%
  - ▶ Participation levels in programs for parents: 11%
  - ▶ Formal documentation or forms: 4%
  
- Those **using formal methods were significantly more likely (68%) to say they’re very aware** of their employees’ parenting and child care needs than those using informal methods (61%).
  
- **Small businesses (5-99 employees) are significantly more likely to collect feedback informally (66%)**. Mid-size (54%) and large (65%) organizations are much more likely to rely on formal methods.

# Impact of COVID-19

- Most participants (58%) said that **COVID-19 has decreased their employees' access to quality child care**, with another 26% saying it is about the same as it was before the pandemic. Fewer than 1% of respondents said it is now more accessible.
  - ▶ Those in the **Education and Health Services** industry were more likely to report that access to quality child care is lower after the pandemic (65%), while those in the **Financial Activities** sector, who also had lower levels of awareness of employees' needs, were significantly more likely than average to report that access is the same as it was prior to the pandemic (36%).
  - ▶ Reported access to child care was relatively consistent across the state, with only the **western region** reporting that child care is significantly less accessible than it was before the pandemic (67%).
  - ▶ **Mid-size** (69%) and **large** (78%) businesses were more likely than small (55%) businesses to report that child care is less accessible than it was prior to the pandemic.
  - ▶ Those **using formal methods to gather feedback** about employees' parenting and child care needs were much more likely than average (65%) to say child care is less accessible than it was prior to COVID-19.
- In the last 12 months, employees' lack of access to child care has contributed to:
  - ▶ Employees changing or **reducing hours**: 45%
  - ▶ **Difficulty hiring** new employees: 43%
  - ▶ Employees taking more **paid leave**: 43%
  - ▶ Employees taking more **unpaid leave**: 42%
  - ▶ Employees **leaving the workforce** (temporarily or permanently): 34%
  - ▶ Employees **working remotely**: 31%
  - ▶ **Lost revenue** due to staffing shortages: 20%
  - ▶ Employees **changing roles** for greater flexibility: 19%
  - ▶ Reduced hours or business **closures** due to staffing shortages: 15%
  - ▶ Other impacts (primarily reduced productivity or bringing a child/children to work): 4%
- **Only 7% of participants said a lack of child care did not impact their business** in some way over the last 12 months.



- When grouped into categories from greatest to least disruption of the business, most participants experienced disruption to employees' schedules or roles rather than larger disruptions to their business:

Disruption to Business Financials or Operating Hours	Unable to Retain Employees	Unable to Attract Employees	Disruption to Employees' Schedules or Roles
26% (255)	34% (332)	42% (419)	70% (684)

- Some impacts occurred across all industries (employees changing or reducing hours, employees changing roles for greater flexibility). Other impacts were greater in specific sectors:
  - ▶ **Difficulty hiring new employees:** Education and Health Services (54%)
  - ▶ **Employees taking more paid leave:** Education and Health Services (52%), Financial Activities (59%)
  - ▶ **Employees taking more unpaid leave:** Education and Health Services (47%), Manufacturing (56%)
  - ▶ **Employees leaving the workforce:** Education and Health Services (45%)
  - ▶ **Employees working remotely:** Financial Activities (47%), Information, Data, and Technology (61%), Professional Business Services (51%), Real Estate and Rental and Leasing (64%)
  - ▶ **Lost revenue due to staffing shortages:** Leisure and Hospitality (29%)
  - ▶ **Reduced hours or business closures due to staffing shortages:** Education and Health Services (19%), Leisure and Hospitality (30%)
- There were no significant impact differences between regions.
- A little fewer than half (47%) of respondents **agreed or completely agreed that the pandemic has changed how their organization approaches employees' parenting and child care needs.**
  - ▶ An additional third (34%) were neutral and 19% disagreed.
- Perceived changes were relatively consistent across industry sectors, though those in the **Education and Health Services** sector were more likely than average to say COVID-19 changed how their organization approaches parenting needs (53%), and those in the **Leisure and Hospitality** (47%) and **Retail Trade** (50%) sectors were more likely to respond neutrally to this statement.
- Small businesses were less likely to agree** that their organization's approach to child care has changed due to the pandemic, with only 44% agreeing (compared to 53% for mid-size organizations and 59% for large organizations).

# Attitudes about the Organization's Role in Supporting Employees' Parenting and Child Care Needs

## Supportive Statements

A LITTLE OVER HALF OF PARTICIPANTS (54%) AGREED OR COMPLETELY AGREED THAT THEIR ORGANIZATION ADEQUATELY SUPPORTS EMPLOYEES WITH THEIR CHILD CARE AND PARENTING NEEDS AT PRESENT.

- 28% were neutral and the remaining 18% disagreed.
- Members of the **Financial Activities** (71%) and **Professional Business Services** (69%) sectors were significantly more likely to agree that their organization adequately supports employees at present.
  - ▶ **Education and Health Services** participants were significantly more likely than average (27%) to disagree/say their organization does not adequately support employees at present.
- **Small organizations** were much more likely than average to agree that their organizations are currently supportive (59%) than mid-size (40%) or large (25%) organizations.
- **Business owners/proprietors** were much less likely than average (12%) to say their organization is not currently supportive of its employees' parenting and child care needs.
  - ▶ Similarly, **those who ultimately decide what benefits employees receive** were much more likely than average to say their organization adequately supports employees (60%).
- There were no significant differences across regions.

ABOUT THE SAME NUMBER (54%) ALSO AGREED OR COMPLETELY AGREED THAT THE SUCCESS OF THEIR ORGANIZATION IS DIRECTLY IMPACTED BY THEIR EMPLOYEES' ACCESS TO CHILD CARE.

- 28% were neutral and the remaining 18% disagreed.
- Those who had **faced a severe business impact of lost revenue or business closures** in the past year were significantly more likely (74%) to agree that the success of their business is tied to employees' access to child care.
- Participants in some industry sectors were more likely to tie the success of their business to employees' access to child care:
  - ▶ **Education and Health Services:** 71%
  - ▶ **Other** (largely government, other services, and child care organizations): 68%



- Other industry sectors were less likely than average to agree that their business' success relies on employees' access to care:
  - ▶ **Financial Activities:** 43%
  - ▶ **Leisure and Hospitality:** 41%
  - ▶ **Retail Trade:** 41%
  - ▶ **Information, Data, and Technology:** 28%
- **Small businesses** (50%) were much less likely than mid-size (65%) and large (75%) businesses to correlate their business' success with employees' access to child care.
- There were no significant differences based on role, decision-making ability, or region.

**HOWEVER, FEWER PARTICIPANTS EXPRESSED WILLINGNESS TO INCREASE THEIR ORGANIZATION'S INVESTMENT IN CHILD CARE NEEDS, WITH ONLY 38% AGREEING OR COMPLETELY AGREEING.**

- A larger percentage (43%) were neutral and 19% disagreed.
- Those **who see a correlation between their business' success and employees' access to child care** are significantly more likely to be willing to increase their investment in early care and education (51%).
  - ▶ **Only 16% of those that did not see a correlation between business success and employees' access to ECE** said they are willing to increase their investment.
  - ▶ Those who had **faced a business impact of lost revenue or business closures** in the past year were also significantly more likely (48%) to agree that they are willing to increase their investment.
- While 37% of those who said their organization already adequately supports their employees are willing to increase their investment, **50% of those who said their organization isn't currently supportive enough are willing to increase their investment.**
- **Education and Health Services** was the only industry sector where participants were significantly more willing than average to increase their organization's investment.
  - ▶ **Financial Activities** (25%), **Leisure and Hospitality** (23%), and **Transportation and Warehousing** (11%) participants were much less likely than average to be willing to increase their investment.
- **Small businesses** were much more likely than average (21%) to say they are not willing to increase their organization's investment.
- There were no significant differences based on role, decision-making ability, or region.



# Unsupportive Statements

## ABOUT ONE IN FIVE PARTICIPANTS (19%) AGREED OR COMPLETELY AGREED THAT IT IS NOT THEIR ORGANIZATION'S ROLE TO HELP PARENTS WITH THEIR CHILD CARE NEEDS.

- An additional 29% were neutral and the remaining 52% disagreed.
- While there was no industry sector that was more likely than average to agree with this statement, a few sectors had significantly lower than average numbers of participants disagreeing with it:
  - ▶ **Leisure and Hospitality:** 42% disagreed
  - ▶ **Manufacturing:** 44%
  - ▶ **Retail:** 32%
  - ▶ **Transportation and Warehousing:** 17%
- **Small businesses** were much more likely than average (21%) to say it's not an organization's role to help employees with their parenting needs.
- **Business owners/proprietors** were also much more likely than average (24%) to say it's not the organization's role, as were those who **hold the ultimate decision-making authority at their organization** (22%).
- Participant's responses were fairly consistent across the state, but those with businesses and/or employees located in the southeastern region of the state were much more likely than average (25%) to say it's not the organization's role.
- Those **who do not see a correlation between their business' success and employees' access to child care** were significantly more likely to agree that it's not the organization's role to help (37%).

## 16% OF PARTICIPANTS AGREED OR COMPLETELY AGREED THAT SUPPORTING EMPLOYEES' PARENTING AND CHILD CARE NEEDS IS NOT A PRIORITY FOR THEIR ORGANIZATION.

- An additional 22% were neutral, and the remaining 62% disagreed.
  - ▶ Of all the statements provided, this statement had the lowest level of agreement (for negative statements) and the highest level of disagreement (compared to agreement for positive statements).
- No industry sector had a higher-than-average level of agreement (indicating a low priority) than average. Two sectors were less likely to disagree than average, including:
  - ▶ **Information, Data, and Technology:** 28% disagreed
  - ▶ **Manufacturing:** 50%
- There was no significant relationship between region, business size, role, or decision-making ability.

- While there was a correlation between whether or not it is a priority of the organization to support employees, of those that placed a high priority on support (by disagreeing with this statement), **only 47% said they were willing to increase their investment, with an additional 41% being neutral towards increasing their investment.**
  - ▶ Of those that were neutral about this statement/whether or not supporting employees' child care needs is a priority for their organization, **only 19% were willing to increase their investment.**
  - ▶ Of those that agreed with this statement/placed a lower priority on support, **31% were still willing to increase their investment.**

**THE MOST COMMON ATTITUDE TOWARDS THE STATEMENT “THE RETURN ON INVESTMENT IS TOO LOW TO INCREASE OUR ORGANIZATION’S INVESTMENT IN EMPLOYEE SUPPORT FOR CHILD CARE” WAS NEUTRALITY, AT 43%.**

- 25% agreed and 32% disagreed.
  - ▶ Of all the statements provided to participants, this is the only one **where the largest number of responses were neutral, possibly indicating that participants are unsure what the return on investment is.**
- **Leisure and Hospitality** (34%) sector participants were more likely than average (34%) to perceive the ROI as low, as were **small businesses in any industry** (28%).
- **Business owners/proprietors** (32%) and **those with ultimate decision-making authority** (29%), were also more likely than average to agree that the ROI is too low.
- Those who **didn't agree that the success of their business is dependent on employees' access to quality child care were similarly less likely to believe in a high return on investment:** 34% agreed that the ROI is too low and 45% were neutral.

# Attitudes about ECE's Role in the Wisconsin Economy and Workforce

- When separated from statements about their individual business, **participants were much more likely to agree to broader statements about the role of ECE in Wisconsin's economy** and as a strategy for addressing workforce shortages:
  - ▶ It is important for Wisconsin businesses to support child care for their employees.
    - Agree: 71%
    - Neutral: 21%
    - Disagree: 8%
  - ▶ Providing employees with resources to support their child care needs is a strategy that all employers should consider to address workforce/labor shortages.
    - Agree: 73%
    - Neutral: 18%
    - Disagree: 9%
  - ▶ Wisconsin's economy is impacted by families' abilities to access affordable, high-quality child care.
    - Agree: 80%
    - Neutral: 13%
    - Disagree: 7%
  - ▶ Without access to affordable early child care, Wisconsin businesses will face workforce/labor shortages now and in the future.
    - Agree: 83%
    - Neutral: 12%
    - Disagree: 5%
- Of the 80% of participants who agreed Wisconsin's economy is impacted by access to child care, **only 61% correlated the success of their own business with access to child care.**
- Of the 83% of participants **who agreed a lack of access to affordable child care would lead to workforce shortages**, in the past 12 months:
  - ▶ 40% had experienced employees leaving the workforce
  - ▶ 48% had difficulties hiring new employees
  - ▶ 22% had lost revenue due to staffing shortages
  - ▶ 17% had reduced hours or business closures due to staffing shortages





- While trends were similar across most industries, a few industries were significantly less likely than average to agree with each statement:

Industry	Important to Support	Strategy to Address Shortages	WI Economy is Impacted	Future Workforce Shortages
<b>Financial Activities</b>	59%	63%	72%	70%
<b>Leisure and Hospitality</b>	62%	62%	Not different from average	71%
<b>Manufacturing</b>	56%	63%	76%	Not different from average
<b>Transportation and Warehousing</b>	39%	50%	56%	56%

- **Small businesses**, generally, were also significantly less likely to agree that:
  - ▶ It's important for Wisconsin businesses to support child care for their employees: 69%
  - ▶ Providing employees with resources to support their child care needs is a strategy that all employers should consider to address workforce/labor shortages: 70%
- **Business owners** were significantly less likely to agree that access to ECE is vital to Wisconsin's economy and workforce than those who identified as **employees**:
  - ▶ It's important for Wisconsin businesses to support child care for their employees:
    - **Business owners:** 64% (significantly lower)
    - **Employees:** 86% (significantly higher)
  - ▶ Providing employees with resources to support their child care needs is a strategy that all employers should consider to address workforce/labor shortages:
    - **Business owners:** 65% (significantly lower)
    - **Employees:** 84% (significantly higher)
  - ▶ Wisconsin's economy is impacted by families' abilities to access affordable, high-quality child care:
    - **Business owners:** 78% (significantly lower)
    - **Employees:** 89% (directionally higher)
  - ▶ Without access to affordable early child care, Wisconsin businesses will face workforce/labor shortages now and in the future:
    - **Business owners:** 73% (significantly lower)
    - **Employees:** 86% (directionally higher)
- **Region only impacted one statement:** 78% of participants in **southeastern Wisconsin** agreed that Wisconsin's economy is impacted by families' abilities to access affordable, high-quality child care (significantly lower than average), and 91% of participants in **southern Wisconsin** agreed (significantly higher than average).

# Perceived Benefits of Supporting Employees' Child Care and Parenting Needs

- Primary top-of-mind benefits included:

## INCREASING EMPLOYEE ATTENDANCE/REDUCING OUTAGES: 45%

"They have excellent attendance and rarely need a day off due to child care. Also, work performance is better when they can focus on their tasks at work."

"They are able to work more hours and not leave early, or have to start later. We have our employees work from 7:45am-3:30pm M-F. It has affected our decision to hire some employees because they cannot arrange for child care."

"They have better attendance and can focus on their roles in our organization with less anxiety and worry about the care being given their children."

## INCREASING EMPLOYEE MORALE AND REDUCING EMPLOYEE STRESS: 25%

"More dependable, productive and happier employees. Employees have less worry throughout the day regarding their child's care and feel better they are working to enable them to actually take home wages to sustain themselves and their families."

"Staff come into work happier and willing to work because they know child is safe."

"Happier employees, less stress."

## INCREASING PRODUCTIVITY: 22%

"We see more productivity, less staff shortages, and higher morale."

"Less stress. More productive and more willing to work additional time."

"The employee is able to focus on their work and not worry about how they are going to pick up their child. They will be able to stay overtime if a project requires it."

## ATTRACTING AND RETAINING TALENT: 11%

"Happier employees, longer employee retention, employees gain long-term employment, steady employment, and become better skilled at their jobs and enables advancement to higher paid positions."

"I believe it might allow us to attract more candidates that have younger children, and are unable to work the hours we need due to child care needs not being available."

"It makes it easier to retain staff, especially young staff having babies."

- **15% of respondents could not think of any benefits or said "none."** 1% responded negatively to the question.

- When asked to choose up to three primary benefits from a list of options, **many of the same benefits rose to the top:**
  - ▶ **It's a way to retain valuable employees: 64%**
    - Participants in the **Manufacturing** sector were much less likely (53%) than average to report this as a top benefit, while **Education and Health Services** participants were much more likely to (70%).
  - ▶ **My employees are more productive when their children's needs are met: 54%**
    - Participants in the **Leisure and Hospitality** (42%) and **Retail Trade** (39%) were much less likely to report this as a top benefit, while those in the **Professional Business Services** sector were much more likely to (69%).
  - ▶ **It's less disruptive to the company because employees aren't working inconsistent hours or leaving: 38%**
    - Participants in the **Agriculture, Forestry, Fishing, and Hunting** (78%) and **Construction** (59%) sectors were likelier than average to report this as a benefit.
  - ▶ **It's a way to attract quality talent to my organization: 34%**
    - **Education and Health Services** participants were more likely than average (40%) to report this as a benefit, while **Leisure and Hospitality** participants were less likely to (23%).
  - ▶ **Employee morale is higher: 22%**
  
- **Small businesses** were much likelier than average to report that there are no benefits to their organization (6%). Top benefits for small businesses were fairly similar to all respondents:
  - ▶ It's a way to retain valuable employees: 63%
  - ▶ My employees are more productive when their children's needs are met: 55%
  - ▶ It is less disruptive to the company because employees aren't working inconsistent hours or leaving: 40%



# Perceived Barriers to Supporting Employees' Child Care and Parenting Needs

- Primary top-of-mind barriers included:

## LACK OF FUNDING: 49%

"I am a small business and by the end of the year there isn't much left over so to add one more thing may be too much."

"As a government entity, our ability to grow revenue is extremely limited and our existing, ongoing financial resources are very limited."

"We currently operate an on-site child care center. It operates at a significant loss each year. It is hard to expand a business unit which consistently loses money."

## LACK OF STAFF: 8%

"Lack of child care workers."

"Flexible scheduling requires additional employees to fill the hours vacated by employees with unexpected child care needs. It's incredibly difficult to find and hire additional employees at this time."

"We would like to provide child care; we do not have the personnel or physical space to accomplish this task."

## DIFFERING EMPLOYEE NEEDS, INCLUDING FAIRNESS FOR EMPLOYEES WHO DO NOT HAVE CHILDREN: 7%

"There is a diverse need and finding solutions to support all employees in different situations. It can also be a challenge to balance the needs of the employees and schedule changes to meet the needs of our customers during the hours and times they are looking for service."

"Employees come from different areas, different care needs."

"Fairness with employees who do not have or decided not to have children. Equal treatment of all staff regardless of their personal situation."

## DIFFICULT TO PROVIDE AS A SMALL OR SEASONAL BUSINESS: 7%

"We are too small to consider this."

"We are only a seasonal business. Funds are limited with what we can do."

## LACK OF CHILD CARE AVAILABILITY IN THE COMMUNITY: 6%

"The cost of child care is out of reach for many of our employees. We provide discounted child care but can't provide free. There are very limited options for child care, particularly for infants, and without child care workforce it's difficult to expand child care spots."

"We have a real hesitancy in entering the daycare sector as a provider given the current labor pool. There is a significant lack of quality daycare in our community and so there are so few options for our employees. Family members (grandparents) have stepped in to fill the gap for traditional daycare."

- **15% of respondents said “not applicable” or “none.”**
- When asked to choose up to three primary barriers from a list of options, **many of the same barriers rose to the top:**
  - ▶ **Cost/difficulty securing funding:** 63%
    - A bigger barrier for: Education and Health Services (78%)
    - A smaller barrier for: Financial Activities (50%) and Manufacturing (46%)
  - ▶ **Low availability of child care options in our community:** 35%
    - A smaller barrier for: Financial Activities (27%) and Transportation and Warehousing (11%)
  - ▶ **Lack of personnel to implement programs or benefits:** 22%
    - A bigger barrier for: Education and Health Services (29%)
    - A smaller barrier for: Retail Trade (9%)
  - ▶ **Lack of support from the state or federal government:** 21%
    - A bigger barrier for: Education and Health Services (28%)
    - A smaller barrier for Financial Activities (11%)
  - ▶ **Increased responsibility for our business:** 18%
    - A bigger barrier for: Retail Trade (32%)
    - A smaller barrier for: Education and Health Services (14%)
  - ▶ **Difficulty determining what types of resources to provide:** 14%
    - A bigger barrier for: Financial Activities (23%) and Manufacturing (24%)
    - A smaller barrier for: Education and Health Services (7%)
- When excluding the **Education and Health Services** industry and **Other** (which contained many child care participants based on open-ended responses), the largest barriers were:
  - ▶ Cost/difficulty securing funding: 54%
  - ▶ Low availability of child care options in our community: 32%
  - ▶ Increased responsibility for our business: 22%
  - ▶ Lack of employee need: 20%
  - ▶ Lack of personnel to implement programs or benefits: 19%
- Only 4% of participants said **there were no barriers facing their organization.**
- For **small organizations**, the top barriers are:
  - ▶ Cost/difficulty securing funding: 64% (directionally higher than average but not significantly)
  - ▶ Low availability of child care options in our community: 34%
  - ▶ Lack of personnel to implement programs or benefits: 21%
  - ▶ Increased responsibility for our business: 20% (statistically higher than average)
  - ▶ Small organizations were also much more likely than average (17%) to say **there’s a lack of need amongst their employees.**

- After cost (62%), **mid-size organizations'** largest barriers are:
  - ▶ Low availability of child care options in our community (42%, higher than average)
  - ▶ Difficulty securing partnerships with child care providers (22%, much higher than average)
  - ▶ Difficulty determining what resources to provide (18%)
  - ▶ Employee need for child care outside of traditional child care hours (16%, much higher than average)
- After cost (53%), **large organizations'** largest barriers are:
  - ▶ Difficulty determining what resources to provide (28%, higher than average)
  - ▶ Employee need for child care outside of traditional child care hours (25%, much higher than average)
- Participants in every region but the **southeastern region** were more likely to report that availability of child care is a large barrier in their region:
  - ▶ Northern: 48%
  - ▶ Western: 43%
  - ▶ Southern: 42%
  - ▶ Northeastern: 42%
  - ▶ Southeastern: 13%
- When southeastern region, statewide, and out-of-state participants' data is excluded, cost (63%) and low availability of child care remain the top two barriers, but **low availability rises to 43%** (from 35%).
- For those who are **willing to increase their investment** in ECE, the biggest barriers are:
  - ▶ Cost/difficulty securing funding: 68% (higher than average)
  - ▶ Low availability of child care options in our community: 43% (much higher than average)
  - ▶ Lack of support from the state or federal government: 28% (much higher than average)



## Current Supports Offered

- Most employers currently offer **flexible working hours** (66%) and **working days/shifts** (57%). Other common policies include **family-centric work policies** (47%), **paid maternity leave** (39%), and **remote work/work from home** (36%).
  - ▶ **Few employers offer actual child care**, either through on-site care operated by the company (15%), child care provider subsidies (10%), on-site care operated by a partner (6%), or partnerships with a local provider (4%).
    - **Child care is also something most employers do not plan to offer**, ranging from 73-81% depending on the offering type.
  - ▶ Across all potential offerings, **most employers do not have plans to make changes beyond what they currently offer** in the next three years.
  - ▶ Parent and child care supports with **lower levels of awareness** include:
    - Employer-sponsored FSA: 18%
    - Employer FSA contribution and/or matching: 18%
    - Family-centric work policies: 15%
    - Child care provider subsidies: 14%
    - Partnerships with off-site providers: 13%

Supports	Currently Offer	Plan to Offer (<3 years)	Do Not Plan to Offer	Unaware
<b>Flexible working hours</b>	66%	3%	30%	1%
<b>Flexible working days/work shifts</b>	57%	4%	37%	2%
<b>Family-centric work policies</b>	47%	6%	32%	15%
<b>Paid maternity leave</b>	39%	6%	51%	4%
<b>Remote work/work from home</b>	36%	3%	58%	3%
<b>Employer-sponsored FSA</b>	29%	5%	48%	18%
<b>Paid paternity leave</b>	27%	6%	62%	5%
<b>Other (primarily allowing employees to bring their child to work)</b>	16%	1%	55%	28%
<b>On-site child care (owned and operated by employer)</b>	15%	4%	73%	8%

Supports	Currently Offer	Plan to Offer (<3 years)	Do Not Plan to Offer	Unaware
<b>Employer FSA contribution and/or matching</b>	13%	5%	64%	18%
<b>Child care provider subsidy</b>	10%	4%	72%	14%
<b>On-site child care (owned and operated by a partner)</b>	6%	2%	81%	10%
<b>Partnership with off-site child care provider</b>	4%	7%	76%	13%

- Across industry sectors:

Supports	A lot more likely than average to currently offer	A lot more likely than average to plan for	A lot more likely than average to not plan to offer
<b>Flexible working hours</b>	Information, Data, and Technology: 94% Professional Business Services: 88%		Education and Health Services: 46%
<b>Flexible working days/work shifts</b>	Information, Data, and Technology: 83% Leisure and Hospitality: 80% Retail Trade: 72% Professional Business Services: 69%	Construction: 15%	Education and Health Services: 51%
<b>Remote work/work from home</b>	Financial Activities: 56% Information, Data, and Technology: 83% Professional Business Services: 62%		Education and Health Services: 67% Leisure and Hospitality: 80% Retail Trade: 83%
<b>Family-centric work policies</b>	Information, Data, and Technology: 72% Professional Business Services: 62% Financial Activities: 56%	Education and Health Services: 9%	

Supports	A lot more likely than average to currently offer	A lot more likely than average to plan for	A lot more likely than average to not plan to offer
<b>Paid maternity leave</b>	Information, Data and Technology: 67% Financial Activities: 56% Education and Health Services: 44%		Retail Trade: 74% Leisure and Hospitality: 74%
<b>Paid paternity leave</b>	Information, Data, and Technology: 50% Education and Health Services: 35%		Real Estate and Rental and Leasing: 91% Retail Trade: 80% Leisure and Hospitality: 76%
<b>On-site child care (owned and operated by employer)</b>	Education and Health Services: 34% Other: 25%	Education and Health Services: 7%	Information, Data, and Technology: 94% Transportation and Warehousing: 94% Financial Activities: 94% Leisure and Hospitality: 88% Retail Trade: 87% Professional Business Services: 85% Manufacturing: 85%
<b>On-site child care (owned and operated by a partner)</b>	Education and Health Services: 13% Other: 13%	Education and Health Services: 5%	Financial Activities: 92% Leisure and Hospitality: 89%
<b>Partnership with off-site child care provider</b>	Education and Health Services: 7%		Financial Activities: 85%
<b>Child care provider subsidy</b>	Other: 22% Education and Health Services: 19%		Financial Activities: 82%

Supports	A lot more likely than average to currently offer	A lot more likely than average to plan for	A lot more likely than average to not plan to offer
<b>Employer-sponsored FSA</b>	Financial Activities: 43% Manufacturing: 39% Education and Health Services: 34%	Information, Data, and Technology: 22% Real Estate and Rental and Leasing: 18%	Leisure and Hospitality: 71%
<b>Employer FSA contribution and/or matching</b>			

- The 54% of respondents who said their organization **currently adequately supports employees** with their parenting and child care needs currently offer:
  - ▶ Flexible working hours: 73%
  - ▶ Flexible working days/shifts: 64%
  - ▶ Family-centric work policies: 53%
  - ▶ Remote work/work from home: 38%
  - ▶ Paid maternity leave: 38%
  - ▶ Employer-sponsored FSA: 28%
  - ▶ Paid paternity leave: 26%
  - ▶ On-site child care (employer): 19%
  - ▶ Other: 19%
  - ▶ Child care provider subsidy: 13%
  - ▶ Employer FSA contribution: 12%
  - ▶ On-site child care (partner): 7%
  - ▶ Partnership with off-site child care provider: 4%
- Of those that **currently offer on-site child care**:
  - ▶ Owned and operated by employer: 79% are part of the **Education and Health Services** sector and 13% are in the **“Other”** sector (primarily child care, government, and consumer services)
  - ▶ Owned an operated by a partner: 72% are part of the **Education and Health Services** sector and 16% are in the **“Other”** sector

- For assessment purposes, benefits were divided into **policy-driven benefits** (like flexible hours or remote work) and **tangible benefits** (like financial supports or on-site child care).

Policy-Driven Benefits	Tangible/Financial Benefits
Remote work/work from home	Employer-sponsored FSA
Flexible working hours	Employer FSA contribution and/or matching
Flexible working days/work shifts	Paid maternity leave
Family-centric work policies	Paid paternity leave
	Partnership with off-site child care provider
	Child care provider subsidy
	On-site child care (owned and operated by a partner)
	On-site child care (owned and operated by the employer)

- When reviewing **policy-driven benefits**:
  - ▶ 17% of participants currently offer all policy-driven benefits.
    - 78% of participants currently offer at least one policy-driven benefit.
    - 22% of participants do not currently offer any policy-driven benefits.
  - ▶ 11% of participants plan to offer at least one policy-driven benefit in the next three years.
  - ▶ 15% of participants do not plan to offer any policy-driven benefits.
  - ▶ Industry and organization size had no significant impact on whether or not the participant currently offers or plans to offer at least one policy-driven benefit.
- When reviewing **tangible or financial benefits**:
  - ▶ Only two respondents currently offer all tangible benefits (0.2%).
    - 61% of participants currently offer at least one tangible benefit.
    - 39% of participants do not currently offer any tangible benefits.
  - ▶ 17% of participants plan to offer at least one tangible/financial benefit in the next three years.
  - ▶ **Of the 39% of participants who do not currently offer any tangible benefits, the vast majority (82%) do not plan to offer any tangible benefits in the near future.**
    - Of the 61% of participants currently offering at least one tangible benefit, the vast majority (83%) do not plan to offer any additional tangible benefits.
  - ▶ **23% of all participants do not plan to offer any of the seven tangible benefits described in the survey.**
  - ▶ 30% of all participants were not aware of at least one tangible benefit.
  - ▶ Only 54% of small businesses currently offer at least one tangible benefit, and 28% do not plan to offer any of the seven tangible benefits described in the survey.
- Of those that said **they are willing to increase their investment in child care supports**:
  - ▶ 27% have plans to offer at least one tangible or financial benefit.
  - ▶ 15% have plans to offer at least one policy-driven benefit.



# Factors that Would Increase Likelihood of Investment

- Finances were the biggest perceived barrier, and the top factors that participants said would **increase their likelihood of additional ECE support also related to funding**:
  - ▶ Increased state/federal funding and eligibility for child care supplements: 56%
  - ▶ Grants to businesses to implement child care programs: 47%
  - ▶ State budget and/or policy changes: 23%
  - ▶ A substantial increase in demand for child care benefits from employees: 21%
  - ▶ Increased pressure to provide benefits to compete: 13%
  - ▶ Actionable plans and stock documentation and contracts: 11%
  - ▶ A large number of employees cannot work: 10%
  - ▶ Personally seeing the value of additional child care benefits: 10%
  - ▶ A state-run FSA program that employers can contribute to: 10%
  - ▶ A small number of employees cannot work: 6%
  - ▶ Other (largely N/A or negative responses): 4%
- **12% of participants said there was nothing that would increase their likelihood of additional ECE support.**
  - ▶ **Small businesses** were much more likely than average to say there is nothing that would increase their likelihood of support (15%).
  - ▶ **Transportation and Warehousing** (33%), **Retail Trade** (25%), and **Leisure and Hospitality** (23%) were also much more likely than average to say nothing would increase their support.



# Research Audience



## Participant Totals

- Participants were surveyed from November 5, 2021-December 6, 2021
  - ▶ 979 participants

# Industry

## PARTICIPANTS

Industry	Percent	Percent (WI)	Sex Ratio
<b>Education and Health Services</b>	34%	23%	4.41x F
<b>Financial Activities</b>	15%	8%	1.75x F
<b>Manufacturing</b>	13%	8%	2.45x M
<b>Leisure and Hospitality</b>	9%	11%	1.25x F
<b>Other</b>	8%	5%	
<b>Professional Business Services</b>	7%	9%	1.33x M
<b>Retail Trade</b>	6%	18%	1.03x F
<b>Construction</b>	3%	5%	9.90x M
<b>Transportation and Warehousing</b>	2%	4%	3.05x M
<b>Information, Data, and Technology</b>	2%	2%	1.26x M
<b>Agriculture, Forestry, Fishing, and Hunting</b>	1%	1%	3.80x M
<b>Real Estate and Rental and Leasing</b>	1%	2%	1.20x M
<b>Wholesale Trade</b>	1%	3%	2.33x M
<b>Utilities</b>	1%	1%	3.36x M
<b>Mining, Quarrying, and Oil and Gas Extraction</b>	0%	<1%	8.22x M

# Organization Size

## PARTICIPANTS

Organization Size	Percent
<b>Small</b>	<b>77%</b>
5-9	25%
10-19	18%
20-49	21%
50-99	12%
<b>Mid-Size</b>	<b>21%</b>
100-249	13%
250-499	6%
500-999	2%
<b>Large: 1,000+</b>	<b>3%</b>

# Region

## PARTICIPANTS

Region	Number
<b>Northern</b>	219
<b>Northeastern</b>	262
<b>Southeastern</b>	311
<b>Southern</b>	246
<b>Western</b>	165
<b>Statewide</b>	88
<b>Outside Wisconsin</b>	18

# Roles

## ROLE

Role	Percent
<b>Owner or proprietor</b>	34%
<b>C-suite/leadership</b>	29%
<b>Manager or supervisor</b>	30%
<b>Employee</b>	6%
<b>Other</b>	<1%

## HUMAN RESOURCES

HR Role	Percent
<b>Sole focus</b>	11%
<b>Part of responsibilities</b>	70%
<b>Not part of responsibilities</b>	18%

## BENEFITS ROLE

Benefits Role	Percent
<b>Ultimate decision-maker or approver</b>	43%
<b>Part of a committee or other group that decides</b>	29%
<b>Provide input, but not ultimate decision-maker</b>	23%
Responsible for securing funding	2%
Responsible for executing new initiatives/programs	4%