



# Untapped Potential: How Childcare Impacts Idaho's State Economy

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“The persistent childcare challenges will not be fixed overnight, and they won’t be fixed by just one sector.”

## Welcome Letter

At the U.S. Chamber of Commerce Foundation, we see childcare as a two-generation workforce issue, crucial for our workforce of today and workforce of tomorrow. Access to affordable, quality childcare is essential for working parents to enter, re-enter, or stay in the workforce, yet it is hard to come by. The first five years of life are critical for children to build a strong foundation upon which future learning is built, yet current supply cannot meet demand. The challenges we face are persistent and complex but solvable. And the business community must be part of that solution.

As a result of these challenges, we needed to better understand how childcare breakdowns impact working parents, their employers, and the state economy. We partnered with the Idaho Association of Commerce and Industry (IACI) on this report to better understand the unique needs of Idaho’s working parents and examine the current childcare landscape.

Idaho is a young state with a strong focus on family and community, which means that there is potential for attracting employees and business to the state. However, quality childcare remains a struggle to find and afford for young families. In fact, roughly 40 percent of Idaho children lack access to childcare, without factoring in the high cost of care.

**Childcare issues result in an estimated \$479 million loss annually for Idaho’s economy. This means that Idaho’s economy annually has millions of dollars of untapped potential.**

Progress is being made in Idaho and both IACI and the Chamber Foundation are committed to supporting these positive steps forward. To do so, partnerships between early education advocates and the business community are vital to ensure that Idaho’s children, families, businesses, and economy are strong. The persistent childcare challenges will not be fixed overnight, and they won’t be fixed by just one sector, so we hope this report provides you with data to better understand the challenges and identify more partners to find the solutions.



**Cheryl Oldham**  
Senior Vice President,  
U.S. Chamber of Commerce Foundation



**Alex LaBeau**  
President, Idaho Association  
of Commerce and Industry

## Executive Summary

There have been numerous studies highlighting the benefits of early childhood education for both children and their parents. Children gain a strong educational foundation and their parents can pursue careers or enhance their education or vocational skills. Despite the evidence in support of early childhood education, we know that families are struggling to find and afford high-quality childcare. Several states—Louisiana, Maryland, Georgia, Washington, and Indiana—conducted reports and found that they each lose over \$1 billion annually in economic activity due to breakdowns in childcare.

Building on the work of these states, the U.S. Chamber of Commerce Foundation partnered with the Idaho Association of Commerce and Industry and the Idaho Association for the Education of Young Children (IAEYC) to understand just how much breakdowns in childcare cost Idaho.

In this study we looked at the causes of childcare challenges as well as motivations behind why parents select various childcare providers. Knowing many employers want to facilitate more access to childcare but do not know where to begin, we sought to learn what types of childcare benefits working parents desire most from employers.

The results indicate there is tremendous untapped economic potential in Idaho if childcare challenges are solved.

As policymakers and business leaders consider ways to position Idaho for success, investing in childcare could enable Idaho to fully capitalize on its resources.

Note: Although there is a lot of energy around paid leave policies across the country, with any solutions proposed, access to affordable, high quality childcare is still a problem for many families. Respondents to our survey conflated, and understandably so, childcare and paid leave benefits. We included all their responses while also recognizing that they are distinct topics and our report only examines childcare.

### TOPLINE FINDINGS

**-\$479 M**

**THE UNTAPPED POTENTIAL:**  
Childcare issues result in an estimated \$479 million loss annually for Idaho's economy

**-\$65 M**

Idaho loses an estimated \$65 million annually in tax revenue due to childcare issues

**-\$414 M**

Absences and employee turnover cost Idaho employers an estimated \$414 million per year

**> 90%**

Over 90% of surveyed parents rely on family members for at least some childcare

**23%**

23% of enrolled parents discontinued school or a workforce training program due to childcare issues

**1/2**

About half of parents reported missing work due to childcare issues in the past three months

# Idaho is a young, growing state with many jobs in manufacturing and agriculture.



**Population:** 1.754 million

**Average Household Income:** \$52,225

**Minimum Wage:** \$7.25 per hour

**Capital:** Boise

**Surveyed:** 332 working parents of children 5 years and younger

## IDAHO PROFILE

Research is clear that early childhood education is crucial for the healthy development for young children and mutually beneficial for their parents. Children gain a strong educational foundation; their parents can pursue careers, higher education, professional development, or other opportunities. Too often parents are scrambling to find childcare and juggle the dual role of being a parent and a good employee. In Idaho, residents are young, with a median age of 36.3,<sup>1</sup> and the economy is heavily reliant on manufacturing. There are over 170,000<sup>2</sup> working parents with children under six years old. Based on the demographics, a strengthened early education system would meet the needs of Idaho's young families.

According to Childcare Aware of America, there are 74,716 children under six who potentially need childcare but only 45,541 spaces are available across Idaho childcare providers.<sup>3</sup> That means 40 percent of Idaho children lack access to childcare, affordability notwithstanding. Further exacerbating the lack of access is Idaho's lack of state investment in early childhood education programs for children under five, often putting childcare options financially out of reach for Idaho's working parents.

Employers are looking for a solution. Companies understand the impact a strong childcare foundation can have for the workforce of today and the workforce of tomorrow. The challenge is that employers do not know how to define or solve the problem.

With funding from the Idaho Department of Health and Welfare (DHW) via the Child Care and Development Block Grant (CCDBG), IAEYC partnered with the University of Idaho's Center on Disabilities and Human Development (CDHD) to create IdahoSTARS. This program provides 5,000 childcare providers throughout the state with professional development to improve the quality of teachers in the state.

Despite the efforts from the private sector, universities, and non-profits, there is minimal financial support from the state legislature.<sup>4</sup> There is positive news that sentiment is changing. Idaho recently received a \$3.3 million federal Preschool Development Grant, which IAEYC will administer this year to complete a needs assessment, a strategic planning process based on existing programs, examine ways to maximize parental choice, share best practices, and improve the quality of existing programs.<sup>5</sup>

With action underway, it's time for employers to join the movement. To make that happen, we needed to outline the impact of breakdowns in childcare beyond absenteeism and understand the direct and indirect ways that childcare is preventing Idaho from having a strong workforce and economy.

<sup>1</sup> <https://www.businessinsider.com/state-median-age-map-2018-11>

<sup>2</sup> Author's calculations based on U.S. Census Bureau data

<sup>3</sup> Child Care Aware of America - Idaho Fact Sheet

<sup>4</sup> <https://www.idahoednews.org/news/as-other-states-boost-pre-k-funding-idaho-misses-out-on-share-of-federal-grants/>

<sup>5</sup> <https://www.idahoednews.org/kevins-blog/idaho-receives-first-ever-federal-grant-for-pre-k/>



# Survey Results

We surveyed parents to gauge how childcare issues impacted their lives across employment and education. Survey respondents are reflective of Idaho’s racial demographics and a normal economic distribution. We also captured the decisions parents make regarding childcare providers—who they selected as providers and why they selected them. Stakeholders must know the motivations behind parents selecting childcare provider in order to align their efforts towards effective solutions.

**FACES BEHIND THE NUMBERS:**

## Meet the Welch Family

Miki and Steve Welch moved to booming Coeur d’Alene, Idaho several years ago and fell in love with the community. Their two children attend Kootenai Kids, a childcare facility owned and operated by Miki’s employer, Kootenai Hospital. Onsite childcare with flexible hours is particularly important to medical providers like Miki, who can sometimes work late and early shifts with unpredictable schedules.

<b>HOMETOWN:</b> Coeur d’Alene, Idaho	
<b>PARENTS:</b> Miki and Steve	<b>CHILDREN:</b> Grace and Ayanna
<b>OCCUPATIONS:</b> Medical provider (Miki) and small business owner (Steve)	<b>CHILDCARE:</b> Mon–Fri, 5am–6pm
	<b>MONTHLY CHILDCARE EXPENSE:</b> \$1400

**THE MORNING SCRAMBLE**

Like most families with young children, getting out the door in the morning can be a crazy rush. But Miki Welch feels lucky that her employer, Kootenai Health, provides high-quality childcare onsite. “My husband, owning a small business, his hours are often very unpredictable... it’s nice to have the flexibility.”

# Key Findings

## Long-Term Impact on Employment and Education

Childcare issues impact a parent’s ability to work or pursue higher education, skills development, or training. Thirty one percent of parents reported childcare issues significantly impacted their employment over the past 12 months, though this varied by geographical classification, (FIGURE 01). This includes parents voluntarily or involuntarily leaving their jobs, decreasing their hours from full-time to part-time, being unable to increase their hours, or being unable to accept a position.

Even parents who have yet to experience disruptions to their employment are impacted. Perhaps because they anticipate challenges in the future, eight percent of working parents said they plan to voluntarily leave a job due to childcare issues.

Another essential piece of information is the age of the children when parents decide to voluntarily leave their jobs. Knowing this can inform targeted initiatives or policies for working parents. Sixty seven percent of parents who voluntarily leave their jobs do so when their child(ren) is one year old or younger, indicating that childcare for infants and toddlers is the greatest need. Due to smaller teacher to child ratios, which are critical to providing a safe learning environment for infants and toddlers, childcare for this group is more expensive,<sup>6</sup> an important factor in why and when parents may choose to leave the workforce. This data also helps businesses understand when their employees are most vulnerable to leave the workforce so that their solutions support working parents when they most need it.

Childcare issues also impede the ability of parents to pursue higher education or training, which ultimately influences their earning potential. Eighteen percent of parents reported they are enrolled in school or a training program. Of this enrolled group, 34 percent reported childcare issues significantly impacted their classes or training program over the past 12 months.

Parents reported either being dropped from a class roster or having to reduce the number of classes they take. When parents are unable to complete their education on time, they must wait longer to pursue promotions or better paying careers. There are additional implications our survey did not capture but are paramount to consider. Many students, regardless of employment status, rely on student loans to cover both school and living expenses. If students drop below half-time status, they may be required to begin paying back their loans while in school. This could add an additional burden to enrolled parents who likely have higher expenses than other students. Like working parents, eight percent of enrolled parents said they plan to postpone school or training programs due to childcare issues.

**FIGURE 01.**  
Percentage of parents who reported childcare issues significantly impacted their employment over the past 12 months, rural vs. urban

**20%**

Rural

**32%**

Urban

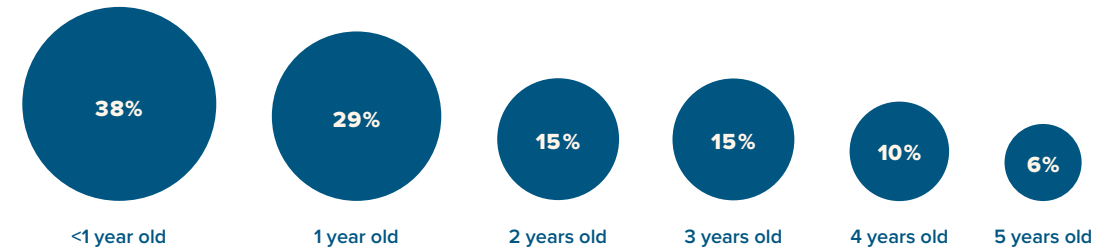
**31%**

State Average

**FIGURE 02.**

Age of child(ren) when working parents had to voluntarily leave or plan to voluntarily leave their job

\*Percentages may total more than 100% because some parents have multiple children



Finally, we asked parents how old their children were when they made the decision to leave work or stop attending classes. Eighty seven percent of parents who voluntarily stop attending classes or training do so when their child is one year old or younger, further indicating that parents of infants and toddlers need the most support and therefore interventions should target that age group.

Decision makers need to consider the significant number of student parents with infants and toddlers who leave school because of the lack of childcare for that age group. To support parents in pursuing their education and career goals, postsecondary education institutions and workforce boards must recognize how childcare is often a barrier for parents to be successful.

Knowing how childcare issues impact employment and education is vital. To get a complete picture, parents responded to a series of questions on their childcare arrangements.

- **96% of parents rely on family members for at least some childcare.**
- **Parents primarily pick their childcare provider based on affordability and personal preferences.**
- **When it comes to cost, families pay an average of \$387 per month for childcare, although it varies by provider type and other factors (see following figures for a breakout of costs).**
- **69% of families pay out of pocket for childcare, with only 5% receiving federal or state childcare provider assistance.**

In developing solutions to this childcare challenge, policymakers and stakeholders should consider ways to support parents who are shouldering the burden of the high cost of care, and also consider their geographic location.

There are regional differences within the state. The following figures break down survey results by region. (See **METHODOLOGY** for how we determined the regions.)

<sup>6</sup> *Where Does Your Child Care Dollar Go?*  
<https://www.americanprogress.org/issues/early-childhood/reports/2018/02/14/446330/child-care-dollar-go/>



**FIGURE 03.**

Percent of parents enrolled in school or training, by rural vs. urban



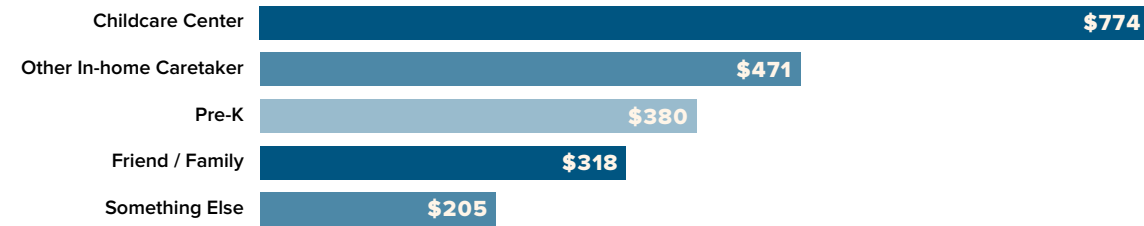
**FIGURE 04.**

How much parents pay for childcare per month, by rural vs. urban



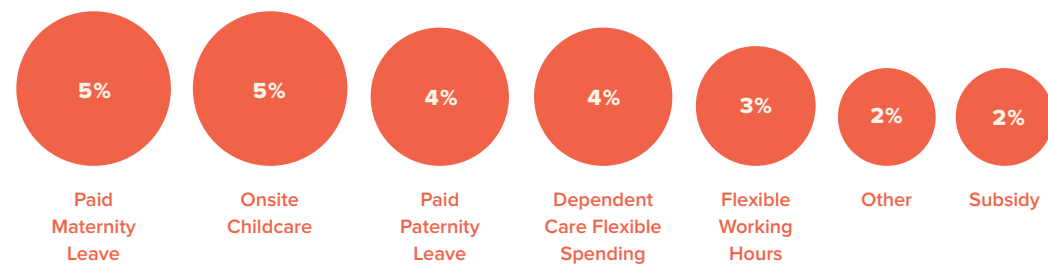
**FIGURE 05.**

How much parents pay for childcare, per month, by provider type



**FIGURE 06.**

Percentage of employers that offer the following benefits



**Childcare Benefits and Accommodations**

To deepen our insights on why parents are facing challenges, we asked several questions regarding what types of childcare benefits and accommodations their employers provide. Fifteen percent of employed parents said their employers offer childcare benefits.

- The two most common benefits employers provide are paid maternity leave and onsite childcare (FIGURE 06)
- Less than one percent of parents said they can bring their children to work

To glean if companies are providing childcare benefits that match parent expectations, we asked all parents, regardless of whether their employer currently offers childcare benefits, to rank their top three most desired childcare benefits.

The results indicate there is a glaring discrepancy between what companies provide and what parents desire.

In our survey, 15 percent of working parents said their employers provide childcare benefits. In FIGURE 06, we show what benefits these employers offer.

Parents highly desired flexible working hours, onsite childcare, and paid maternity leave. Among working parents who receive any kind of employer-provided childcare benefits, only three percent offer flexible working hours. While companies do offer various accommodations, this provides an opportunity for employers to better align their benefits with the needs of working parents.

**FIGURE 07.**

Benefits desired by parents, in order of highest average rank  
\*Parents ranked their top three choices



**MAKING THE ROUTINE WORK**

Miki Welch’s employer-sponsored childcare, Kootenai Kids, is across the street from her work. She explains that, “childcare is an essential part of what makes our family run” and that without it, “our day-to-day would be much more difficult.”

## Economic Impact

We estimate there is an untapped potential of \$479 million annually in Idaho due to childcare issues.

This includes direct employer costs and lost state tax revenues. When parents face challenges securing adequate childcare or disruptions in their childcare provider arrangements, the impacts ripple throughout the community. First, parents either miss work completely, arrive late, or leave early. Even if this does not occur, parents may still be distracted at work merely thinking about or receiving calls from their childcare provider. Employers face a cost due to worker absenteeism. These costs include lost wages to the worker(s) who did not show up (or who arrives late or must leave early), paying overtime to other workers who must cover a shift, or even hiring and paying temporary workers. Based on our survey results, 48 percent of Idaho parents missed an average of 12 days of work over the past year. Given this, we calculate the direct employer cost due to absenteeism to be \$166 million.

If parents are repeatedly unable to find an appropriate childcare provider, this can cause them to voluntarily leave the workforce or the employer to terminate them. When this happens, the employer must replace the worker. Research indicates turnover costs an employer approximately one-fifth the worker’s annual earnings.<sup>7</sup> This means the turnover cost to employers alone is \$248 million.

Long-term childcare issues impact more than working families and employers. There is also an indirect cost to Idaho in the form of lost tax revenues. When parents temporarily leave the workforce due to childcare issues, Idaho does not collect income taxes from those individuals. In addition, these parents may reduce their spending which leads to a decrease in sales tax revenue. We estimate Idaho loses a total of \$65.4 million annually due to both turnover and absenteeism.

<sup>7</sup> *There Are Significant Business Costs to Replacing Employees.* Heather Boushey and Sarah Jane Glynn. Center for American Progress.

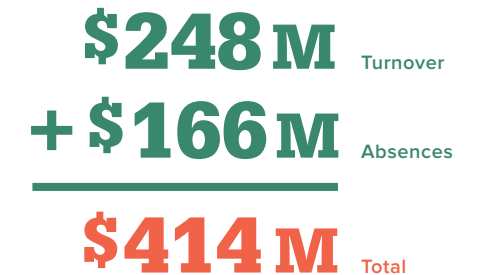
**THE UNTAPPED POTENTIAL:**

**\$479M**

Childcare issues result in an estimated \$479 million loss annually for Idaho’s economy

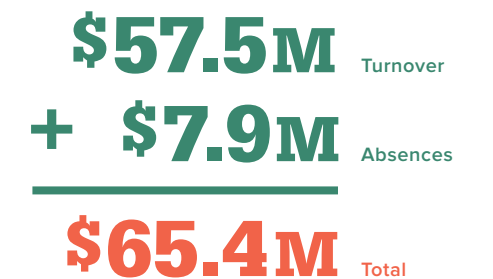
**FIGURE 08.**

Direct employer costs



**FIGURE 09.**

Direct tax revenue impact





# Disruptions to Parental Employment

When parents experience childcare issues, there are both long-term and short-term consequences. The long-term consequences include separation from employment (voluntarily or involuntarily) or significant changes to employment. Beyond employment, parents enrolled in school or training programs may also experience the same long-term consequences. To compare to national data, we asked a question that the National Survey of Children’s Health (NSCH) included in its 2016 administration of the survey:

The National Survey of Children’s Health (NSCH) asked<sup>8</sup>

**“During the past 12 months, did you or anyone in the family have to quit a job, not take a job, or greatly change your job because of problems with childcare for this child, age 0-5 years?”**

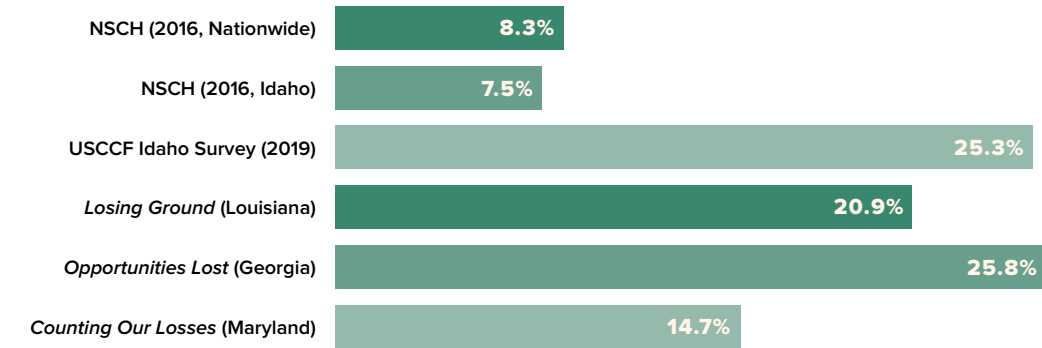
According to the NSCH, nationally, 8.3 percent of parents reported childcare issues are causing significant disruptions to their employment, while fewer Idaho parents (7.5 percent) experienced disruptions. In this survey, the parents reported much higher rates (25.3 percent) of childcare issues impacting their employment. This higher rate is likely due to our survey focusing specifically on childcare issues with respect to employment and education, whereas the National Survey of Children’s Health survey was a broader survey on overall child health. In Georgia,<sup>9</sup> Louisiana,<sup>10</sup> and Maryland,<sup>11</sup> 25.8 percent, 20.9 percent, and 14.7 percent parents, respectively, answered, “yes” to the NSCH question.

Additionally, women and men experience different levels of disruptions due to childcare issues. Women reported their jobs were greatly impacted at higher rates than men—25.9 percent of women and 22.2 percent of men responded “yes” to the NSCH benchmark question. Pew Research Center has insightful findings on how women and men perceive careers and childcare differently.

- Women spend more time both on paid work and on childcare relative to past decades
- Women face more pressure to be involved parents than men
- While men face less pressure to be involved parents, men face more pressure to support their family financially<sup>12</sup>

**FIGURE 10.**

Percentage of respondents reporting childcare issues significantly impacted employment, compared nationally



Although we view childcare as a workforce issue, we recognize that caregiving responsibilities impact subpopulations in different ways.

These data do not fully consider the different presentations of families in this country and how childcare impacts them in different ways. While this NSCH benchmark did not break down responses based on household composition (such as single or same sex parents), it is important to note these dynamics may not look the same for all households.

Income also impacted how parents responded to the NSCH question. Parents earning less than \$50,000 annually reported being impacted at higher rates than parents earning more than \$50,000 annually, 31.5 percent and 19.4 percent, respectively.

On the following pages, we breakdown how parents responded based on their marital status, gender, employment type, and income.

<sup>8</sup> <https://www.childhealthdata.org/browse/survey/results?q=4798&r=14&r2=1>

<sup>9</sup> Georgia Early Education Alliance for Ready Students (2017). *Opportunities Lost: How Child Care Challenges Affect Georgia’s Workforce and Economy*

<sup>10</sup> Louisiana Policy Institute for Children (2017). *Losing Ground: How Child Care Impacts Louisiana’s Workforce Productivity and the State Economy*

<sup>11</sup> Maryland Family Network (2018). *Counting Our Losses: The Hidden Cost to Marylanders of an Inadequate Child Care System*

<sup>12</sup> Pew Research (May 8, 2019). *6 facts about U.S. moms*

THE NATIONAL SURVEY OF CHILDREN'S HEALTH (NSCH) ASKED

“During the past 12 months, did you or anyone in the family have to quit a job, not take a job, or greatly change your job because of problems with childcare for this child, age 0-5 years?”

**FIGURE 11.**

Percentage of parents who answered “yes” to the NSCH question, by marital status

MARITAL STATUS	PERCENT
Overall	25.3%
Married	23.4%
Single	35.6%

**FIGURE 12.**

Percentage of parents who answered “yes” to the NSCH question, by gender

GENDER	PERCENT
Overall	25.3%
Female	25.9%
Male	22.2%

**FIGURE 13.**

Percentage of parents who answered “yes” to the NSCH question, by employment type

EMPLOYMENT TYPE	PERCENT
Overall	25.3%
Full-time	25.5%
Part-time	20.8%
Stay-at-home parent	27.9%

**FIGURE 14.**

Percentage of parents who answered “yes” to the NSCH question, by annual income

INCOME	PERCENT
Overall	25.3%
< \$50,000 per year	31.5%
> \$50,000 per year	19.4%

## Long-Term Impact

While including the NSCH question allows us to compare to national surveys, we wanted to dive deeper into how exactly childcare issues impacted parents' ability to work or pursue higher education. We asked parents how their jobs had been impacted over the past 12 months.

Overall, 31 percent of parents experienced significant disruptions to their employment, with 16 percent leaving their jobs, either voluntarily or involuntarily.

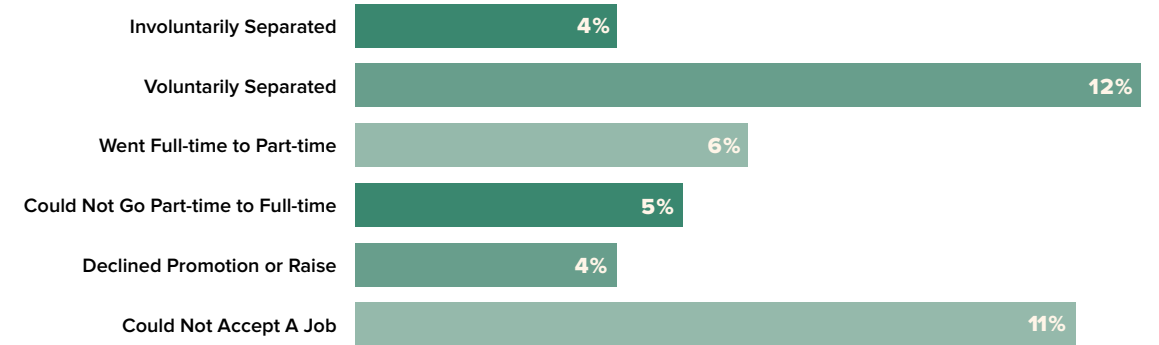
Beyond employment, parents enrolled in school or training programs may also experience the same long-term consequences. An educated populace provides benefits to the entire economy, and on an individual level, higher education is tied to higher income. Higher education is also correlated with better health, lower rates of unemployment, and higher wages for workers without formal degrees.<sup>13</sup> When parents pause their education or professional development, the time it takes for them to acquire the skills to pursue higher paying jobs increases. Although this disruption to education does not directly impact the economy, other studies have estimated the opportunity cost of forgoing postsecondary education or training.<sup>14</sup>

The following figures illustrate the various ways parents said childcare issues impacted their ability to develop professionally.

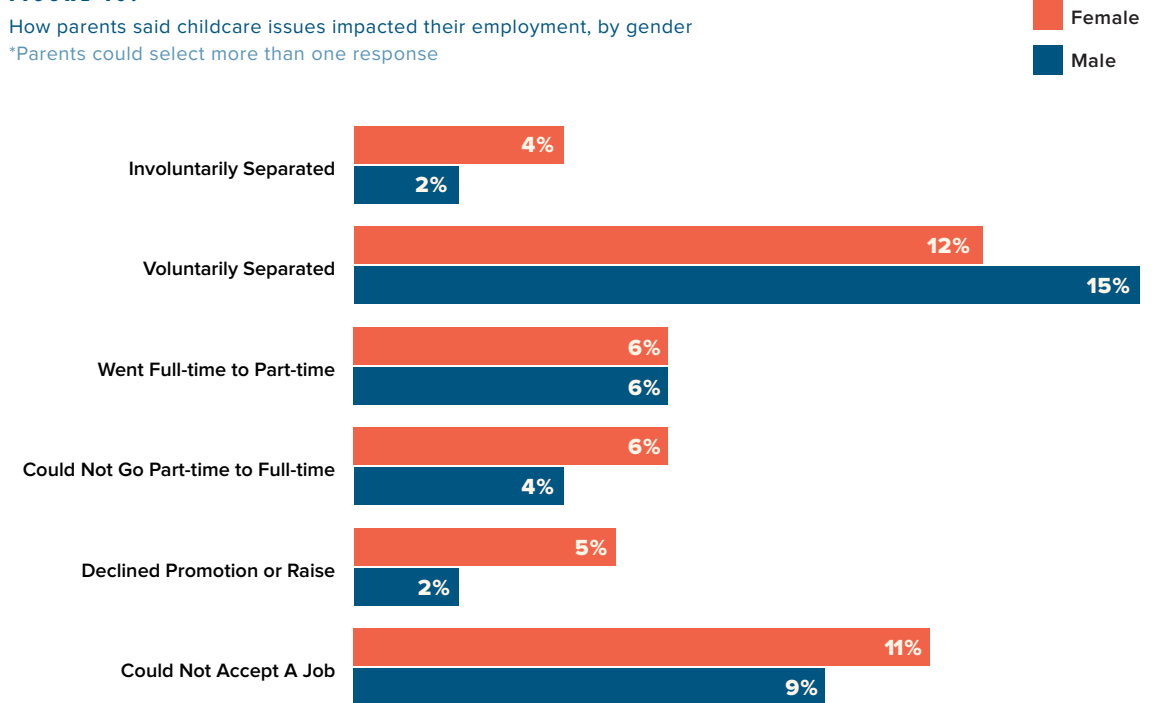
**“These data indicate that working parents of young children are making career decisions based on childcare needs, which may negatively impact their future careers and financial stability.”**

<sup>13</sup> Brookings Institution (April 26, 2017). *Eight economic facts on higher education*  
<sup>14</sup> Maryland Family Network (2018). *Counting Our Losses: The Hidden Cost to Marylanders of an Inadequate Child Care System*

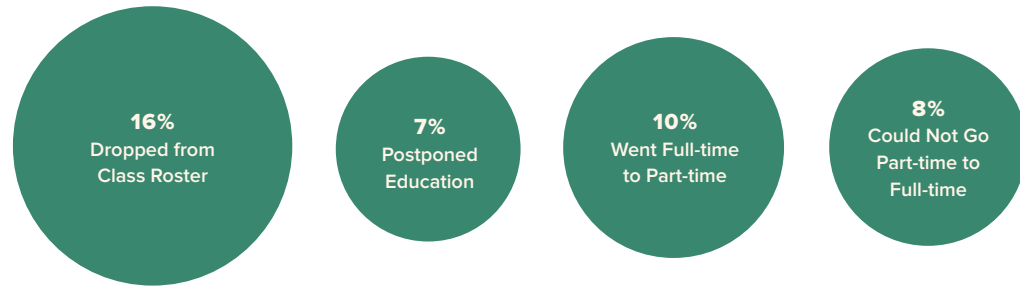
**FIGURE 15.**  
 How parents said childcare issues impacted their employment  
 \*Parents could select more than one response



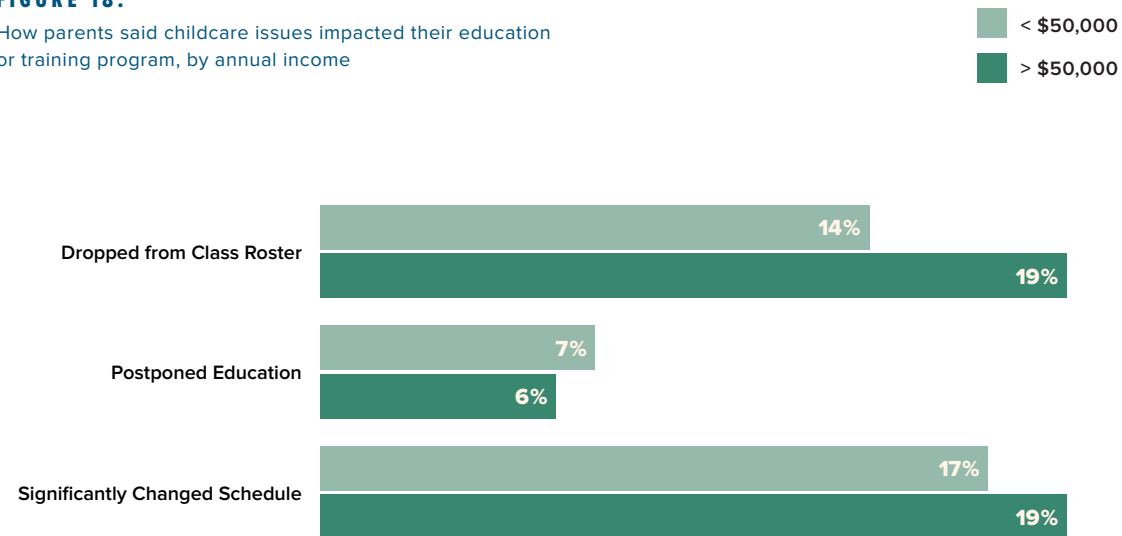
**FIGURE 16.**  
 How parents said childcare issues impacted their employment, by gender  
 \*Parents could select more than one response



**FIGURE 17.**  
How parents said childcare issues impacted their education or training program



**FIGURE 18.**  
How parents said childcare issues impacted their education or training program, by annual income

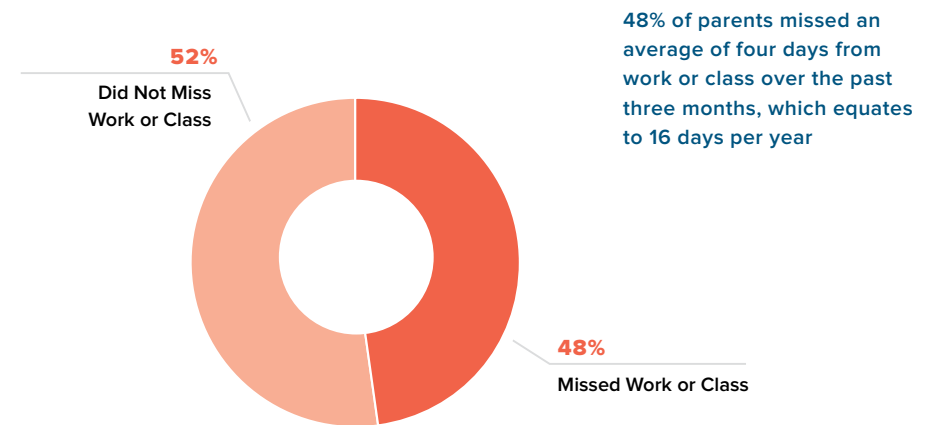


## Short-Term Impact

Even when parents can balance their childcare provider issues with work or class schedules in the long term, they may struggle with smaller yet serious short-term disturbances. We defined short-term consequences as occurrences, over the past three months, of parents missing work or class, arriving late, or leaving early. We also asked parents how many times they were distracted at work or received phone calls from their childcare provider while at work or in class. While parents may experience short-term disruptions for many reasons, almost half of all parents said that they experienced disruptions specifically due to childcare provider issues.

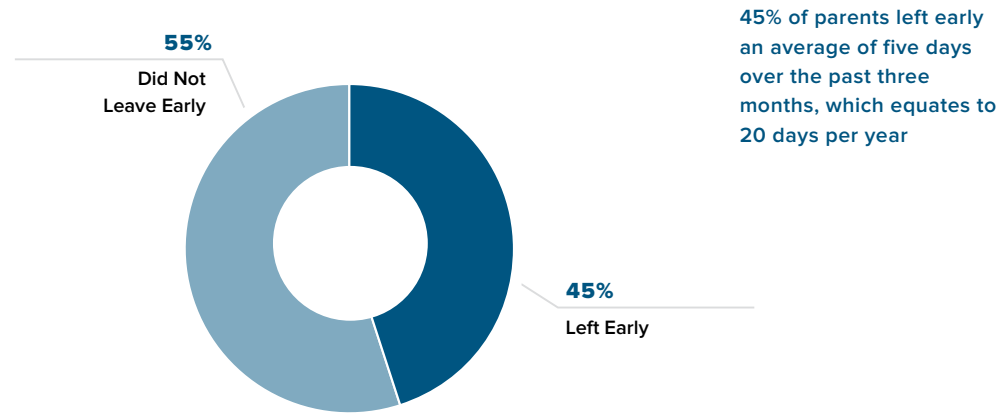
The following charts show what percentage of parents report short-term disruptions to their work or school. Alongside each figure is the average number of days they were absent, tardy, or had to leave early.

**FIGURE 19.**  
Percentage of parents who missed work or class

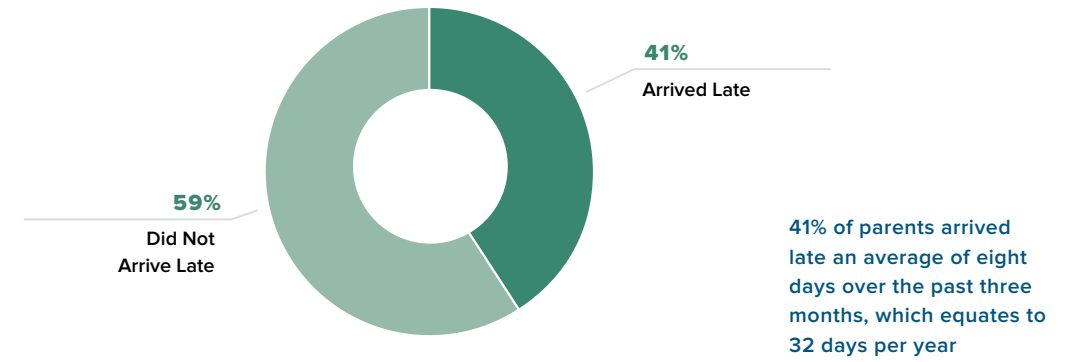




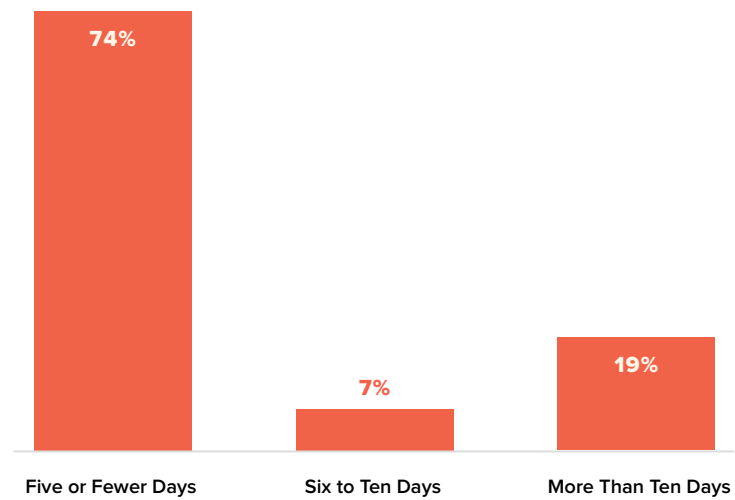
**FIGURE 20.**  
Percentage of parents who left work or class early



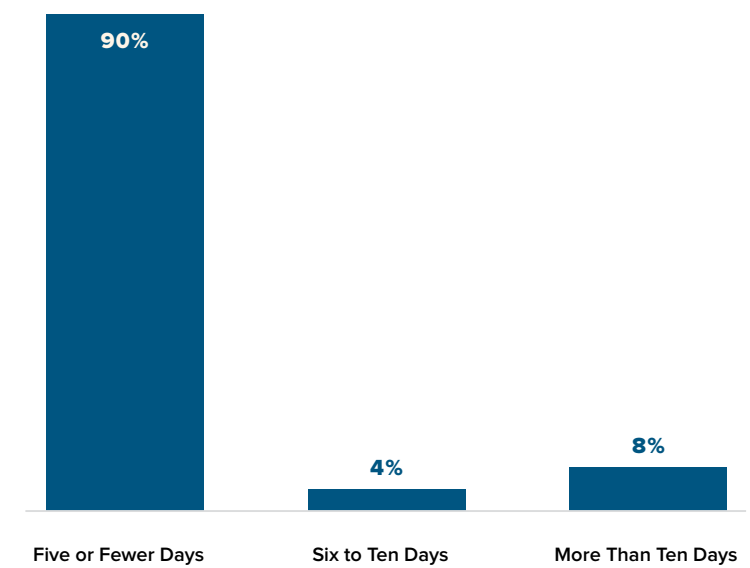
**FIGURE 22.**  
Percentage of parents who arrived late to work or class



**FIGURE 21.**  
Parents who were distracted while at work



**FIGURE 23.**  
Parents who received phone calls from their childcare provider while at work or class



## Conclusions and Implications

Childcare issues impact Idaho working parents across the socioeconomic spectrum. The economic impact is not limited to parents and employers, but instead the effects ripple throughout local communities and across the state.

Idaho values family and community. Our data shows parents leave the workforce quickly to care for children and that childcare investment hasn't quite caught up to childcare needs. In fact, Idaho has one of the largest percentages of stay-at-home parents. The Idaho Association of Commerce and Industry says its member companies recognize it as an issue.

Unfortunately, most of Idaho's working parents do not work for companies that provide the childcare benefits they need. As our survey shows, there are companies who provide childcare benefits, but there are opportunities for others to step up. Companies can demonstrate their commitment to family and community by increasing support for childcare benefits.

One such example is Kootenai Health. As a solution to a nursing and family care provider shortage, they decided to subsidize high-quality childcare with hours that accommodated its unique shifts. The creation—Kootenai Kids—has proven to be an outstanding recruitment tool. Employers across the state can signal they care about Idaho values by following the lead of the companies like Kootenai Health.

We recognize that very few companies have the financial resources or expertise to set up onsite childcare. However, there is a menu of options that employers may not be aware of when considering how best to invest in their workforce's childcare needs. Every employer can begin by surveying their working parents. This low-cost option can help them understand what employees are currently doing for childcare and what they would like to see from their employer.

Furthermore, when employers and state and local government consider how to better engage Idaho workers in workforce training programs or higher education, they should consider the implications that childcare has on one's ability to complete a program.

Childcare impacts Idaho's businesses, families, and economy. Employers and elected officials must thoughtfully consider how to include childcare in their plans to support their workforce. Doing so will help Idaho regain the \$479 million in untapped potential, attract new business to the state, and ensure the success of working parents and their employers.

### A COMMUNITY BENEFIT

Danny Klocko, Executive Vice President for Human Resources at Kootenai Health, knows that Kootenai Kids is a vital part of their business. "Kootenai Kids is one of the most valuable things we have for our employees. We're doing a great service for not only our employees but for the people in our community."

## METHODOLOGY

As with other childcare studies in states such as Louisiana, Georgia, Maryland, Indiana, and Washington, this study was conducted in two phases. First, the U.S. Chamber of Commerce Foundation, the Idaho Association of Commerce and Industry, and the Idaho Association for the Education of Young Children partnered with Cicero Group to conduct a statewide survey of households with children age five and under, asking these parents a series of questions investigating the intersection of between workforce participation, education, and childcare issues. This survey was conducted via telephone and online. Second, Cicero Group estimated the economic impact of childcare issues based the results of the survey from the first phase and secondary data sources, such as U.S. Census Bureau data.

## APPENDIX A: SURVEY METHODOLOGY AND RESPONDENT DEMOGRAPHICS

Data for this report are based on a sample of adult residents (18 years or older) in Idaho who have at least one child five years old or younger. Cicero Group conducted the online and phone surveys between September 20, 2019 and November 30, 2019. The total sample includes 332 Idaho parents (including stepparents or legal guardians) who met the above conditions.

RACE	White	Black	Asian	American Indian / Alaskan Native	Native Hawaiian / Pacific Islander	Other
N=332	308	4	4	6	0	10

SEX	Female	Male
N=332	278	54

MARITAL STATUS	Married	Single	Other
N=332	261	45	26

REGION	Rural	Urban
N=332	31	296

Five respondents provided zip codes that could not be classified as urban or rural.