



**resonate**  
www.resonate.cx

A MARKET STUDY COMMISSIONED  
BY RESONATE CX

# Childcare Customer Experience Opportunities 2026 | ANZ

## About Resonate CX

Resonate CX is a global Voice of the Customer (VoC) platform transforming how early learning providers listen to and support families. As childcare groups grow (through new centre openings and acquisitions) maintaining a consistent, high-quality family experience becomes both more important and more complex. We help childcare organisations turn parent feedback into clear, actionable insights that strengthen trust, protect enrolments, and support centre teams.

Our native AI-driven experience analytics surface real-time signals across every centre, highlighting what families value most, where support is needed, and how to create a stronger sense of belonging from enquiry through long-term enrolment. We believe family experience is not a “nice to have.” It’s the foundation of reputation, retention, and sustainable growth in early learning.

The insights presented in this report are based on a survey conducted with a 95% confidence level and a margin of error of  $\pm 5\%$ .

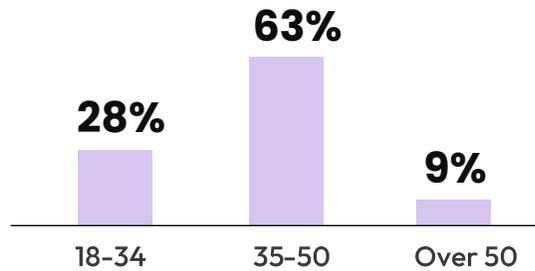
AGENDA

# Growth focused CX insights

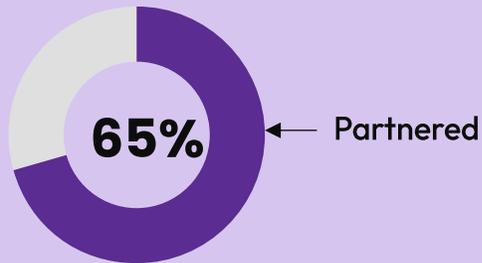
- 1 Market Overview and Key Trends
- 2 Acquisition and Conversion
- 3 Family Segments
- 4 The Ideal Childcare: What Families Want

# What Makes Up the Current Market?

Age of parents responding to the survey



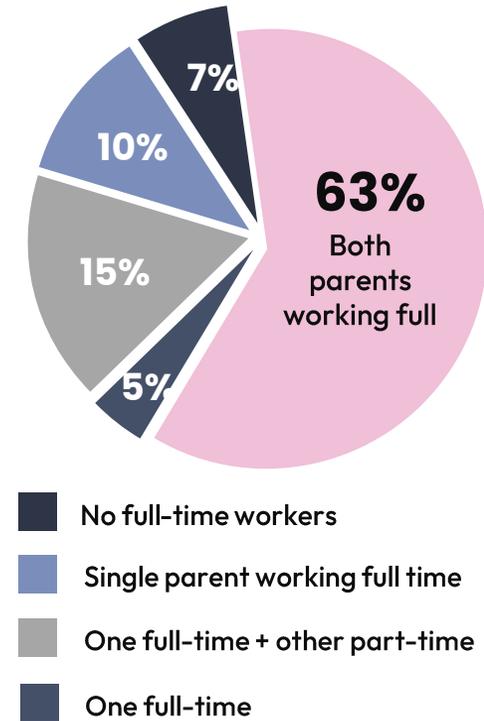
Marital Status



Income group of current service users



Working Status of Partnered



Early education must position itself as developmental and essential, not just childcare for working families, but a stronger value proposition altogether.

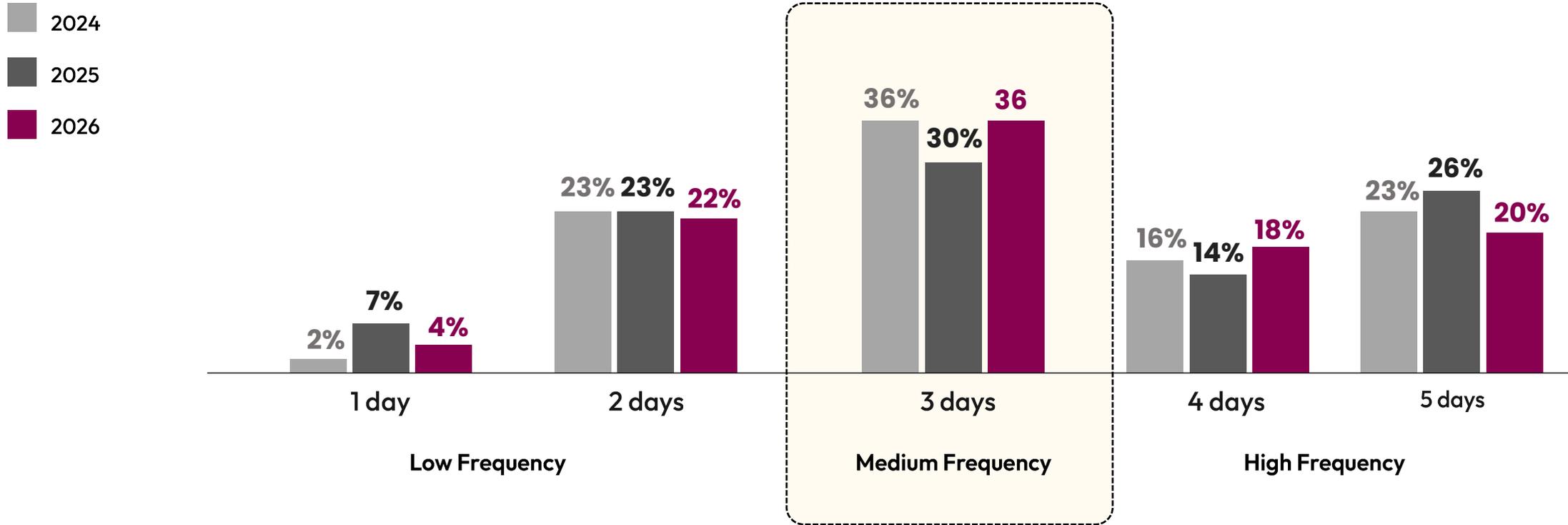
PART 1

# Market Overview & Key Trends

- ✓ Shifting usage patterns
- ✓ Key decision drivers & barriers
- ✓ Churn risk & provider switching



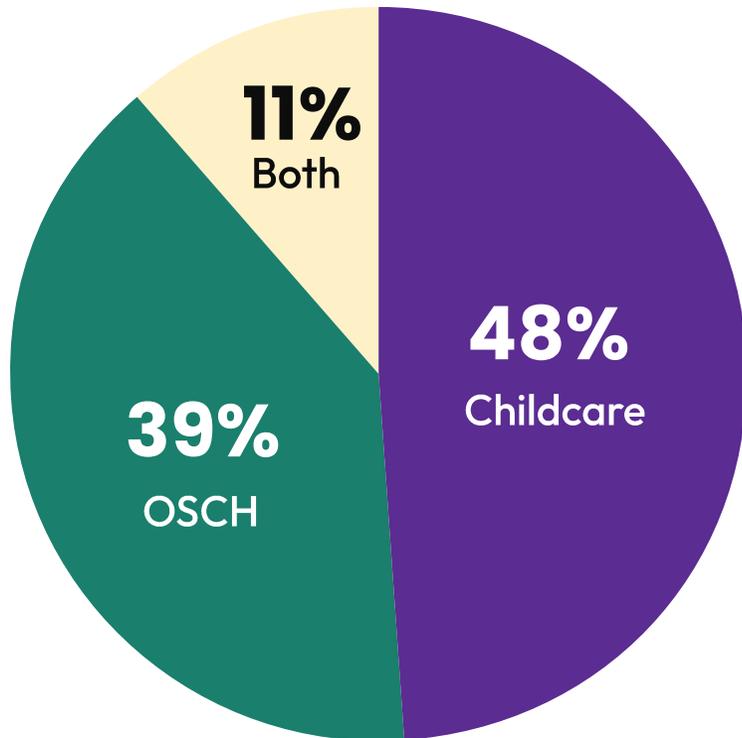
## Shift in Usage Patterns Since 2024



Last year's shift into four- and five-day care has not been sustained. **Three-day usage has climbed back** to a third of the market, while higher-frequency users are fluctuating — signalling **renewed volatility** in the segments that drive partial churn.

## Why Do Customers Use Childcare & OSCH Services?

Service(s) Used By Customers

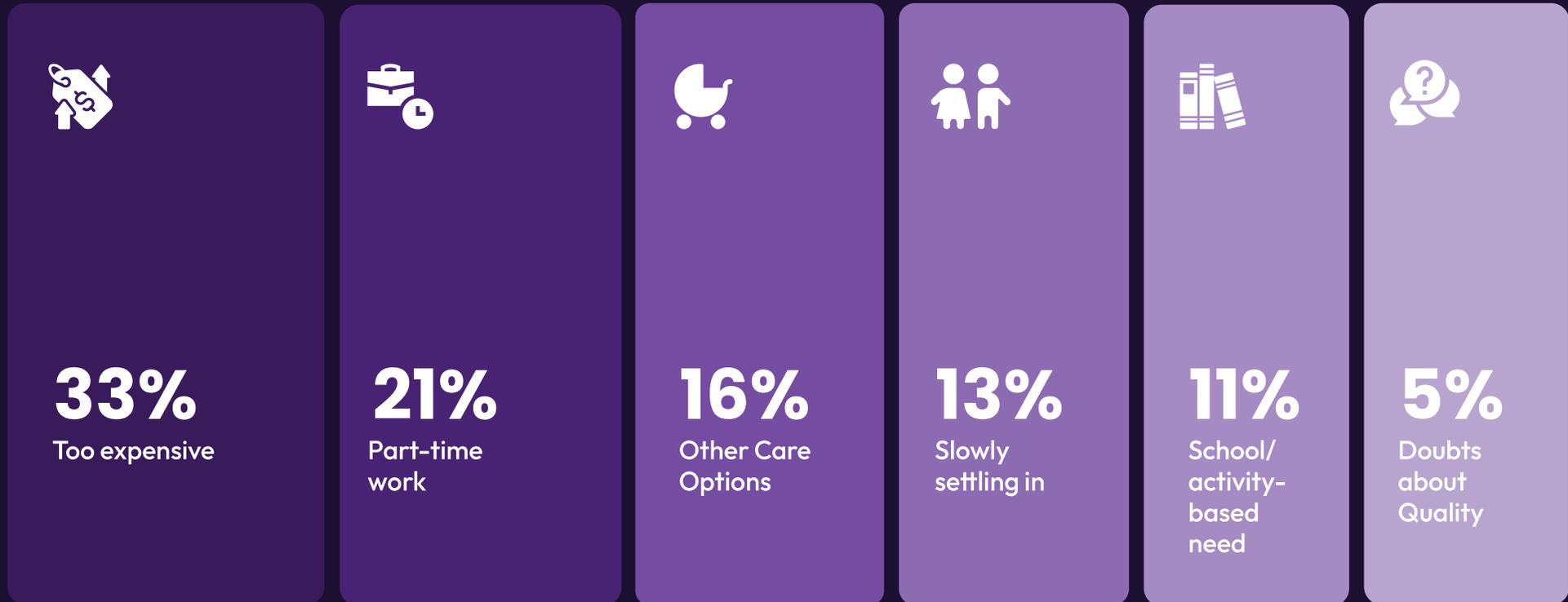


	Childcare	OSCH
Work	54%	61%
Social Interaction	30%	26%
Education / development	31%	21%
Studies or training	19%	10%
Family routine	11%	16%
Break or self-care	3%	2%
Lack of other care options	1%	5%

Beyond work, **social interaction** and **education/development** are key drivers in both childcare and OSCH, making them a strong opportunity to lead with.

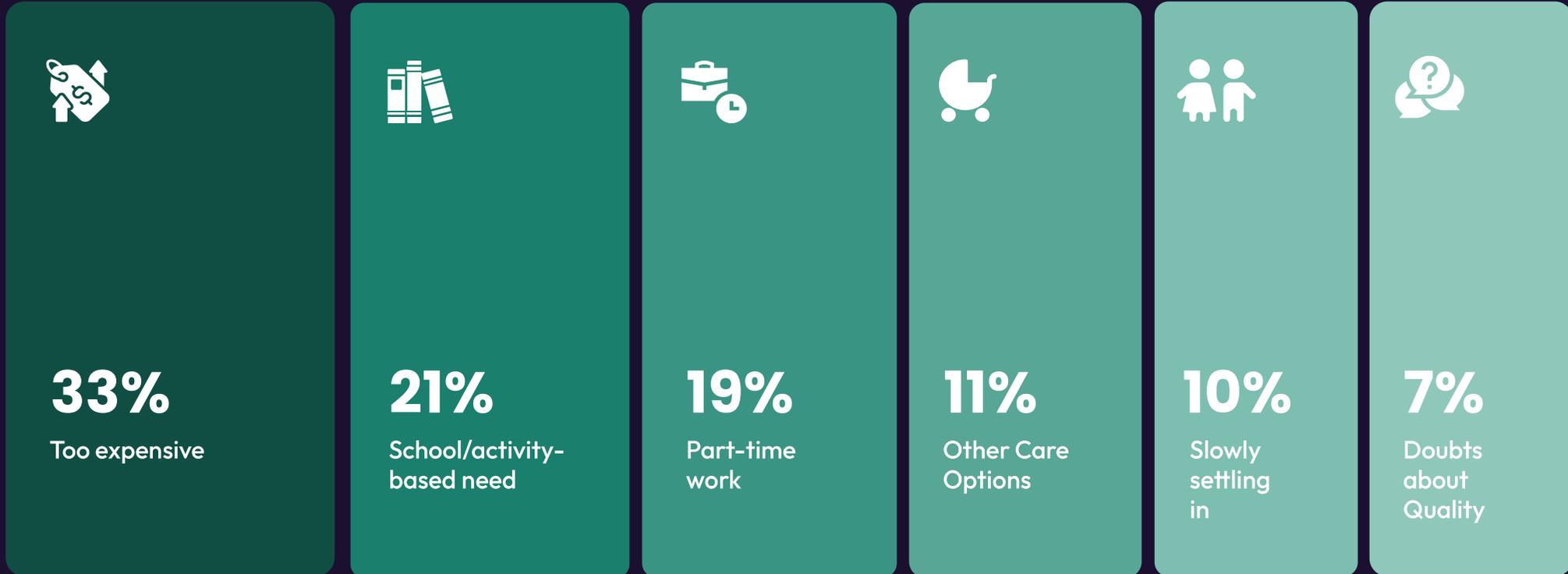
% of respondents within each group

# Childcare: Why Not More?



Instead of competing for price, competing for increased frequency represents a large opportunity. This means addressing other care options directly, particularly around unmet social and developmental outcomes in order to increase frequency.

# OSHC: Why Not More?

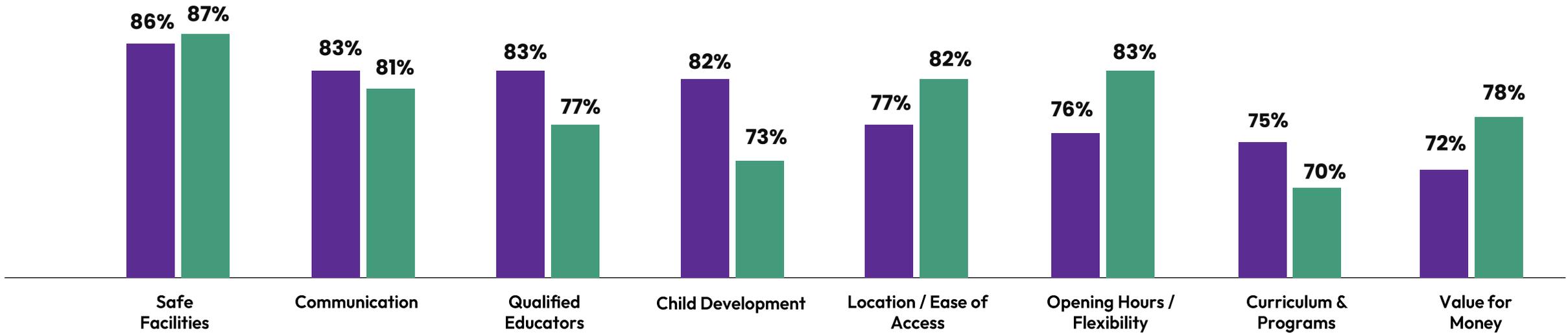


Growth requires recognising that the real competition is activity-based offerings that position themselves as developmental or skill-building alternatives.

# Top Factors For Choosing Childcare or OSHC

Childcare   
OSHC 

Parents prioritise **security, child development, qualified educators** and **communication** while also valuing affordability and holistic care.



Note: % = “Very important” + “Extremely important”

Providers must consistently and clearly communicate **educator quality and investment in development** throughout the early buying journey; not assume it is understood.

# Churn in Current Market

## Changed provider in the last 12 months

PRIMARY  
REASONS FOR  
CHANGING  
PROVIDERS



CHILDCARE

20%

- ⚠ Dissatisfaction with health, safety and wellbeing / facilities
- ⚠ Communication/Support
- ⚠ Fees or Overall Cost



OSHC

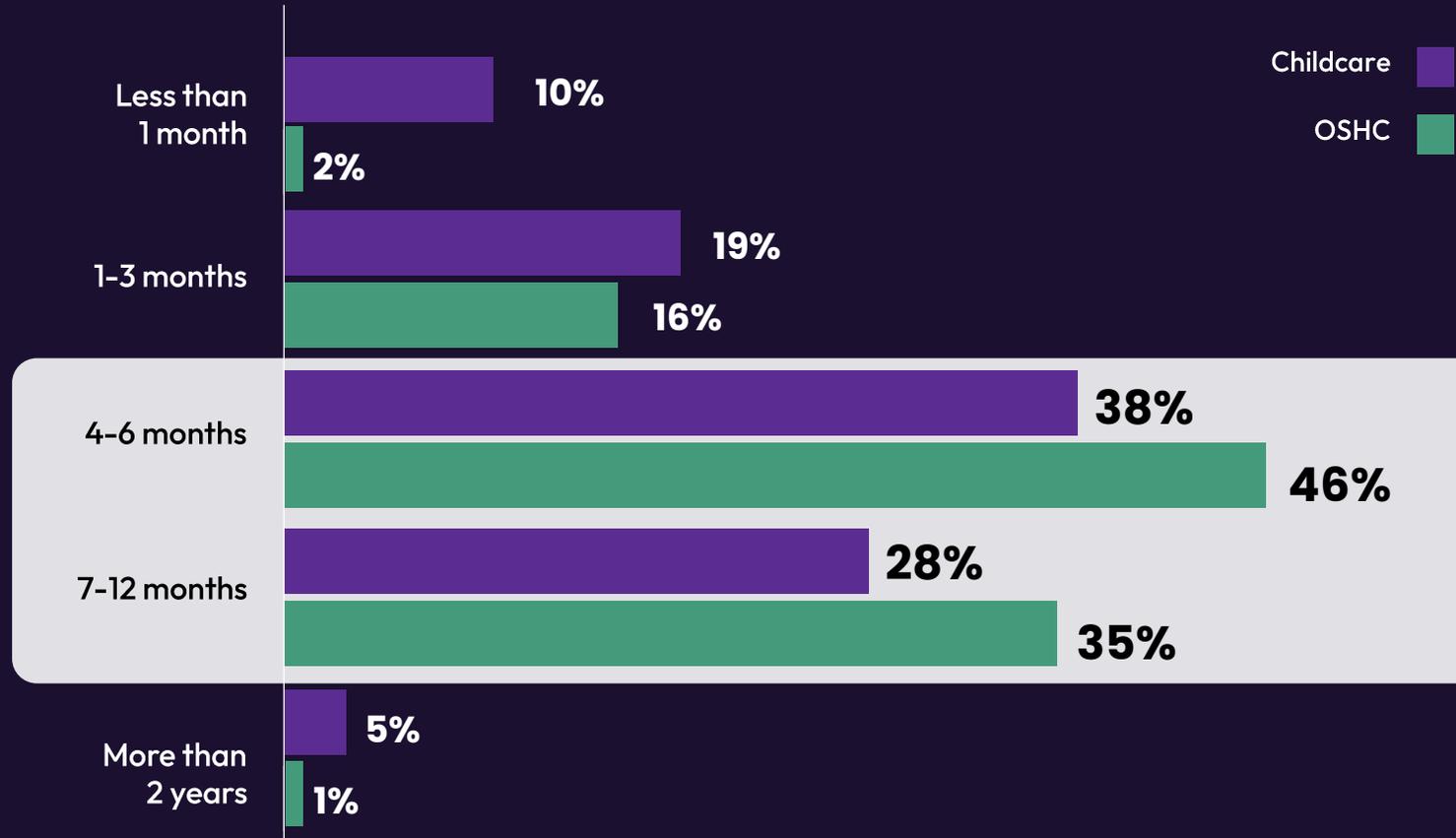
11%

- ⚠ Curriculum/programs
- ⚠ Communication/Support
- ⚠ Location/Accessibility

The market is entering a period of heightened **due diligence**, with parents scrutinising **health, safety and wellbeing** more closely than before. This **increased vigilance** is expected to continue over the next 6–12 months.

# Churn Timing In The Current Market

Likelihood of switching provider in the next 12 months

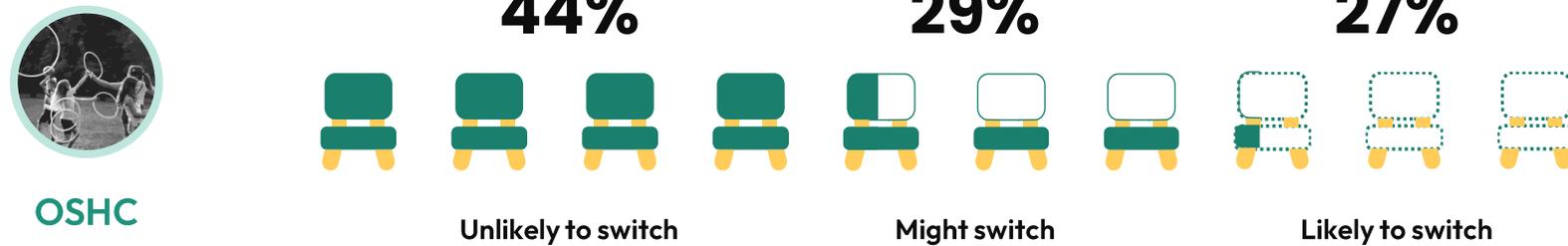
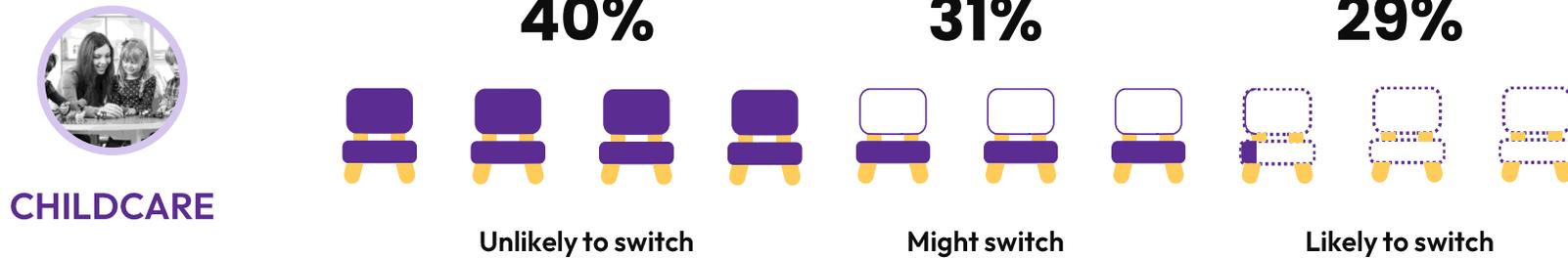


Childcare  
OSHC

Parents continue their due diligence in the **first three months**, well beyond the tour, meaning onboarding is still part of the acquisition journey.

## Sector-level churn risk overview

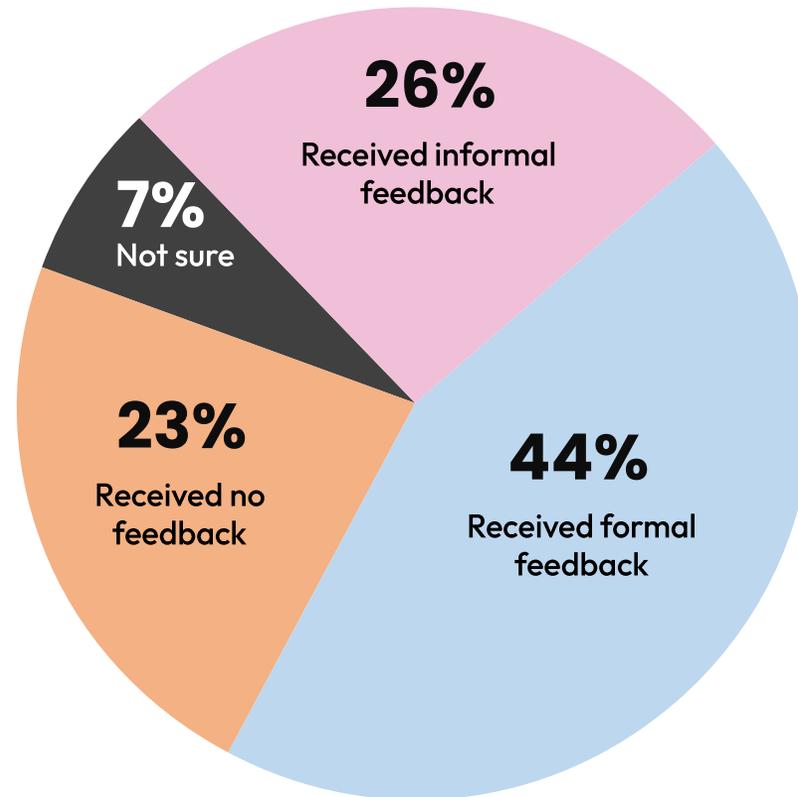
### Likelihood of switching provider in the next 12 months



A growing **“FOMO” mindset** means parents are more willing to **reconsider decisions** than in the past, making **quality experience and consistency** critical to **retention**.

## The feedback loop in practice

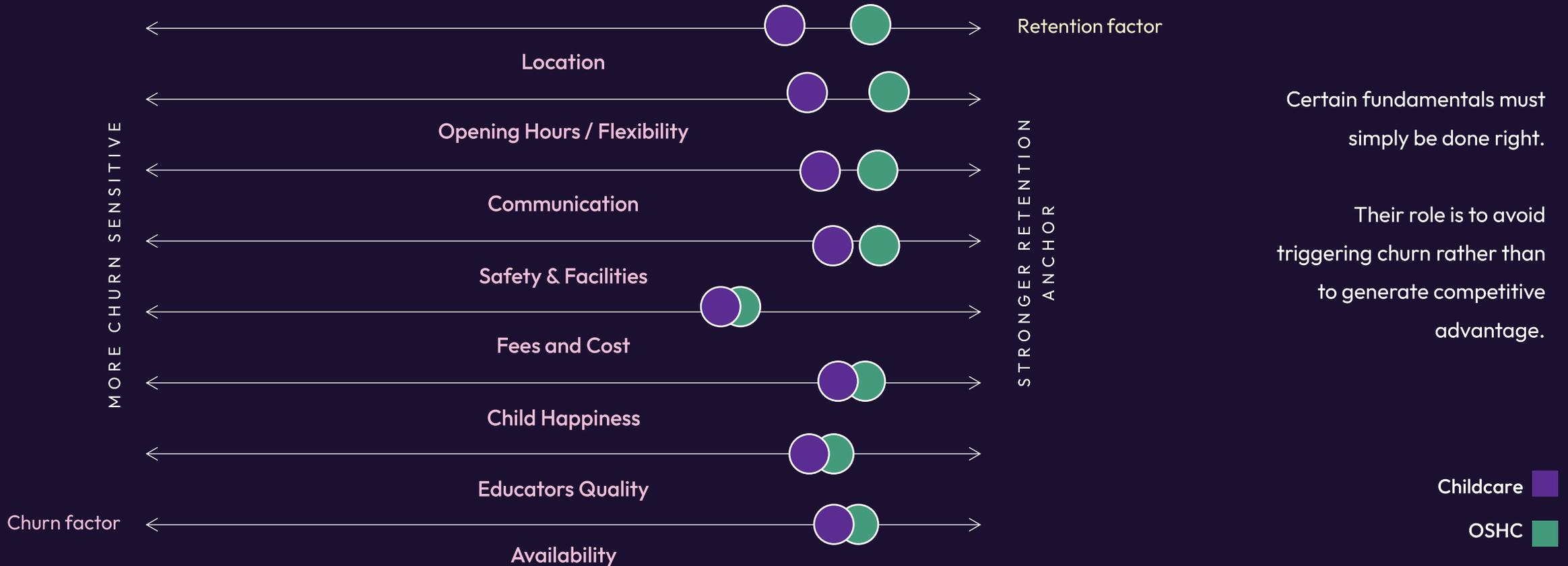
**Feedback  
requested in  
last 6 months?**



In a market where switching intent is high, **limited feedback** visibility **increases the risk of silent churn.**

**Small unresolved issues can escalate unnoticed**, especially as families are exposed to targeted alternatives and actively considering change.

# Which drivers are actually working as retention or churn factors



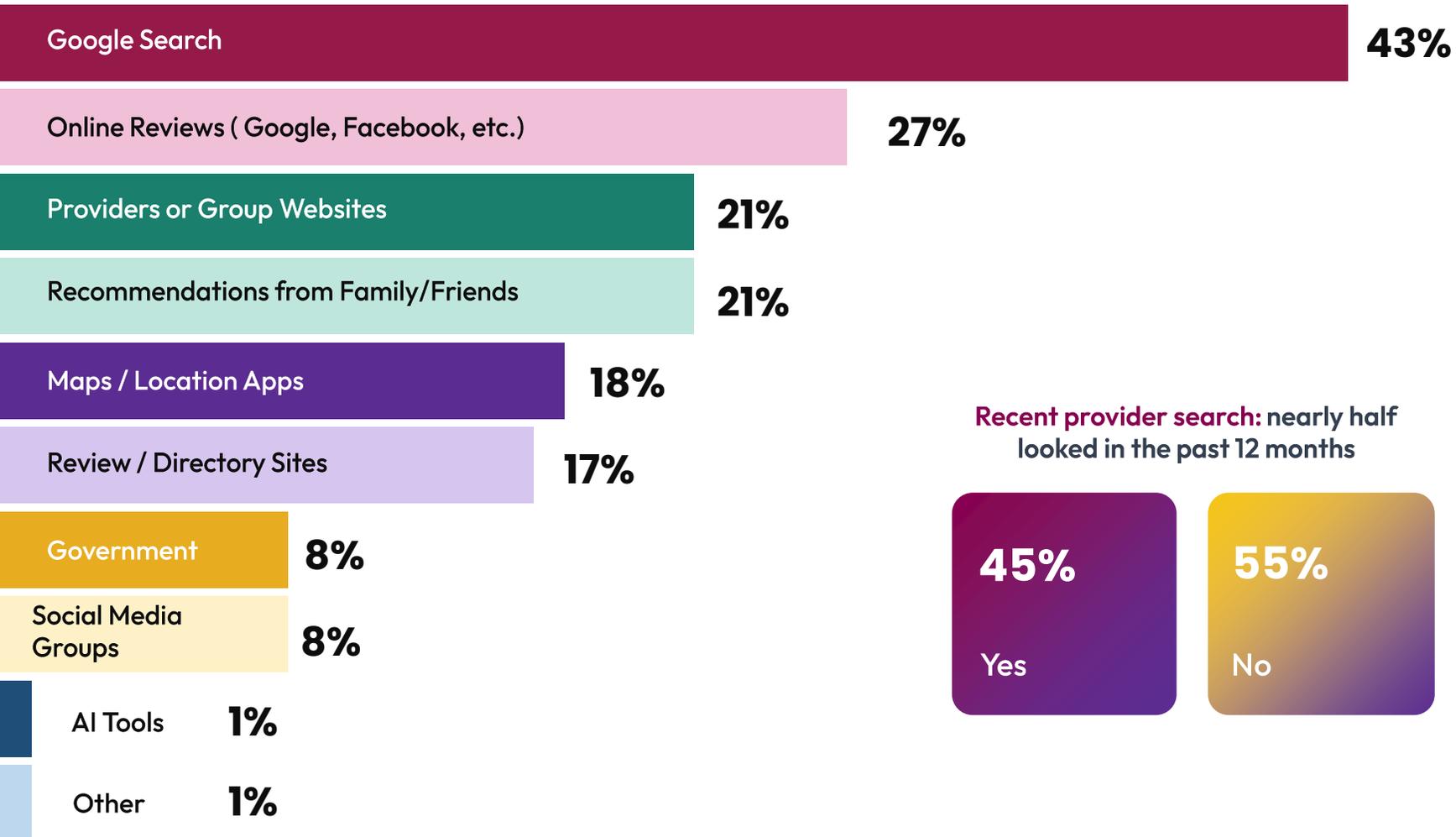


PART 2

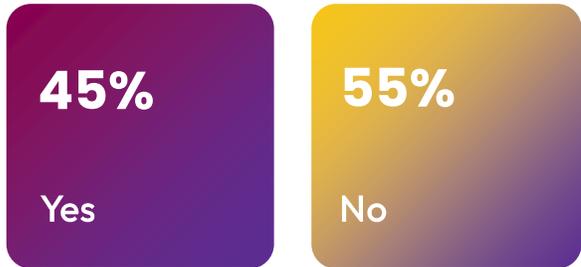
# Acquisition and Conversion

- ✔ **Search:** how today's parents search for providers
- ✔ **Health, Safety and Wellbeing Standards:** Current confidence levels and what drives them
- ✔ **Tours:** Tour frequency, what's converting today, and what can be improved

# Search behaviour in the childcare journey



Recent provider search: nearly half looked in the past 12 months

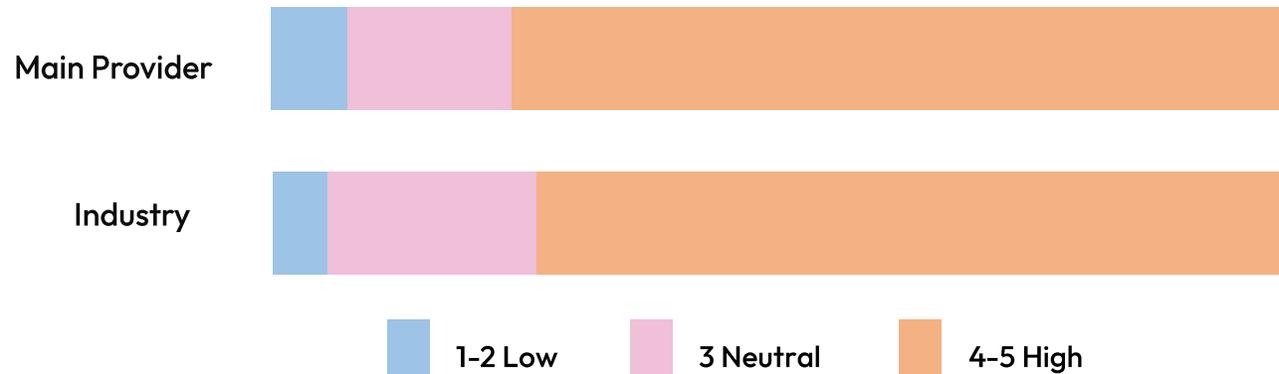


In a tightly connected five-kilometre market, **reputation travels fast**.

With most families only one to two degrees of separation apart, **recommendations and reviews** carry significant weight in **driving search** and **switching behaviour**.

## Confidence in health, safety, and wellbeing standards

How confident do parents feel about health, safety, and wellbeing standards in the industry overall and at their provider?

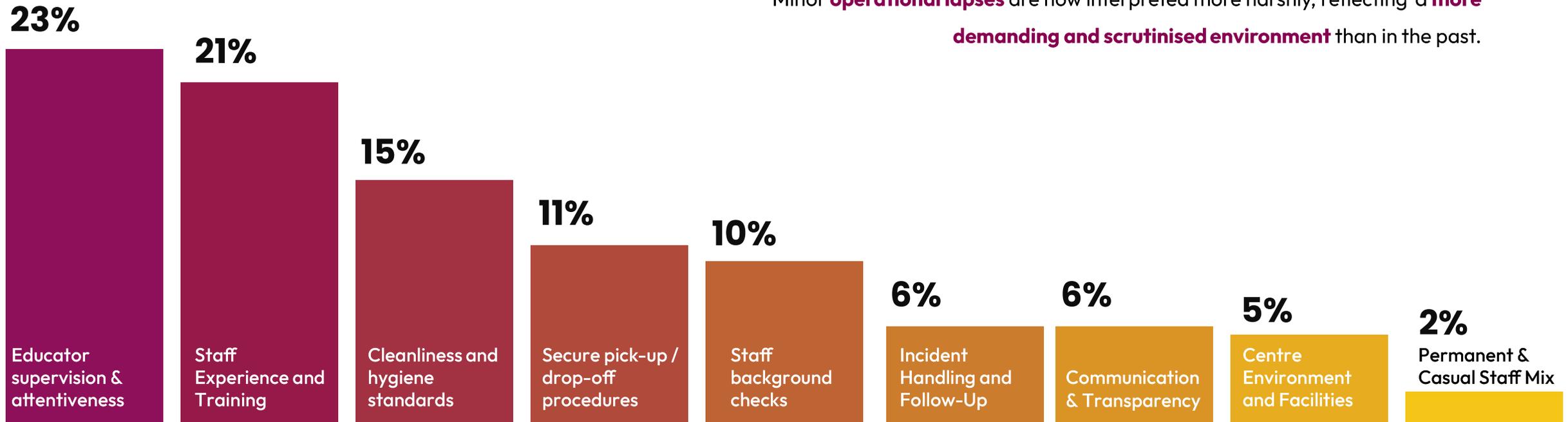


Heightened **due diligence** reflects **scrutiny, not collapse of trust**, meaning providers must **actively reinforce confidence** during acquisition, especially with new families influenced by external narratives.

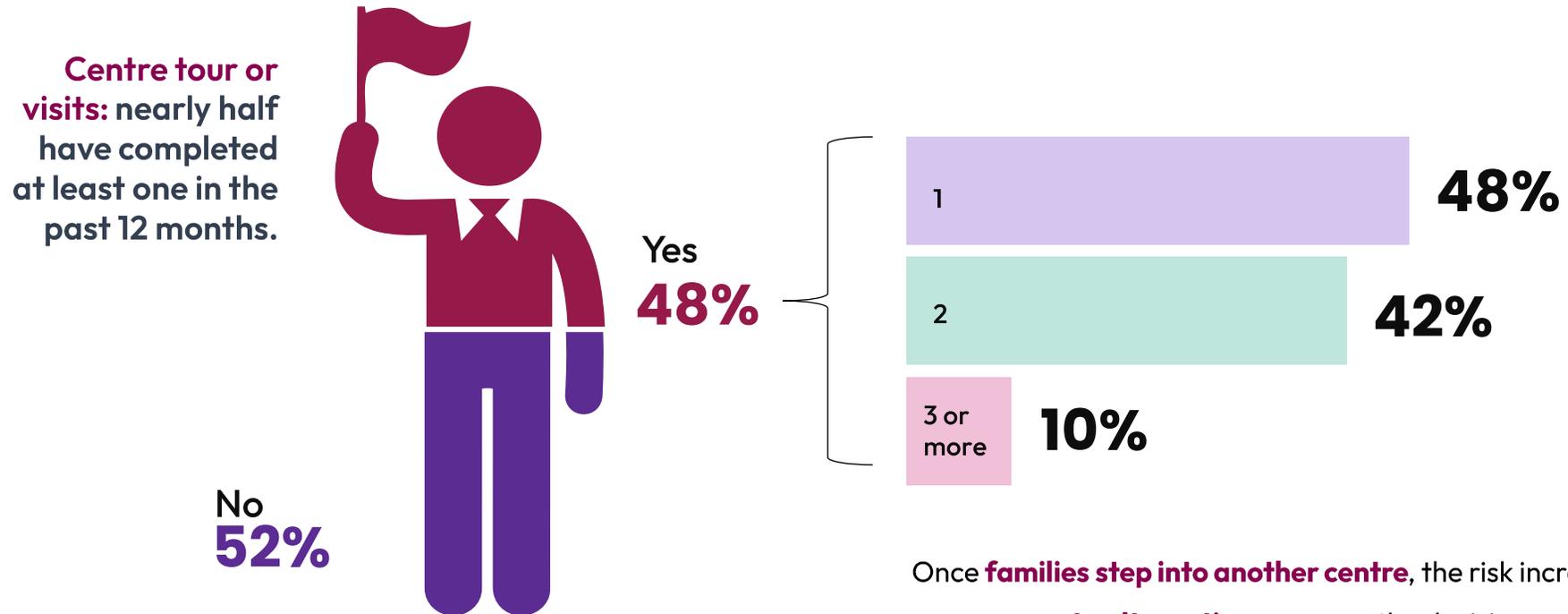
# What drives confidence in Health , Safety and Wellbeing

Confidence in health, safety and wellbeing is primarily driven by **visible supervision, attentiveness, and staff experience**, with anything perceived as unsupervised quickly triggering concern.

Minor **operational lapses** are now interpreted more harshly, reflecting a **more demanding and scrutinised environment** than in the past.



## Continuous shopping around and viewings



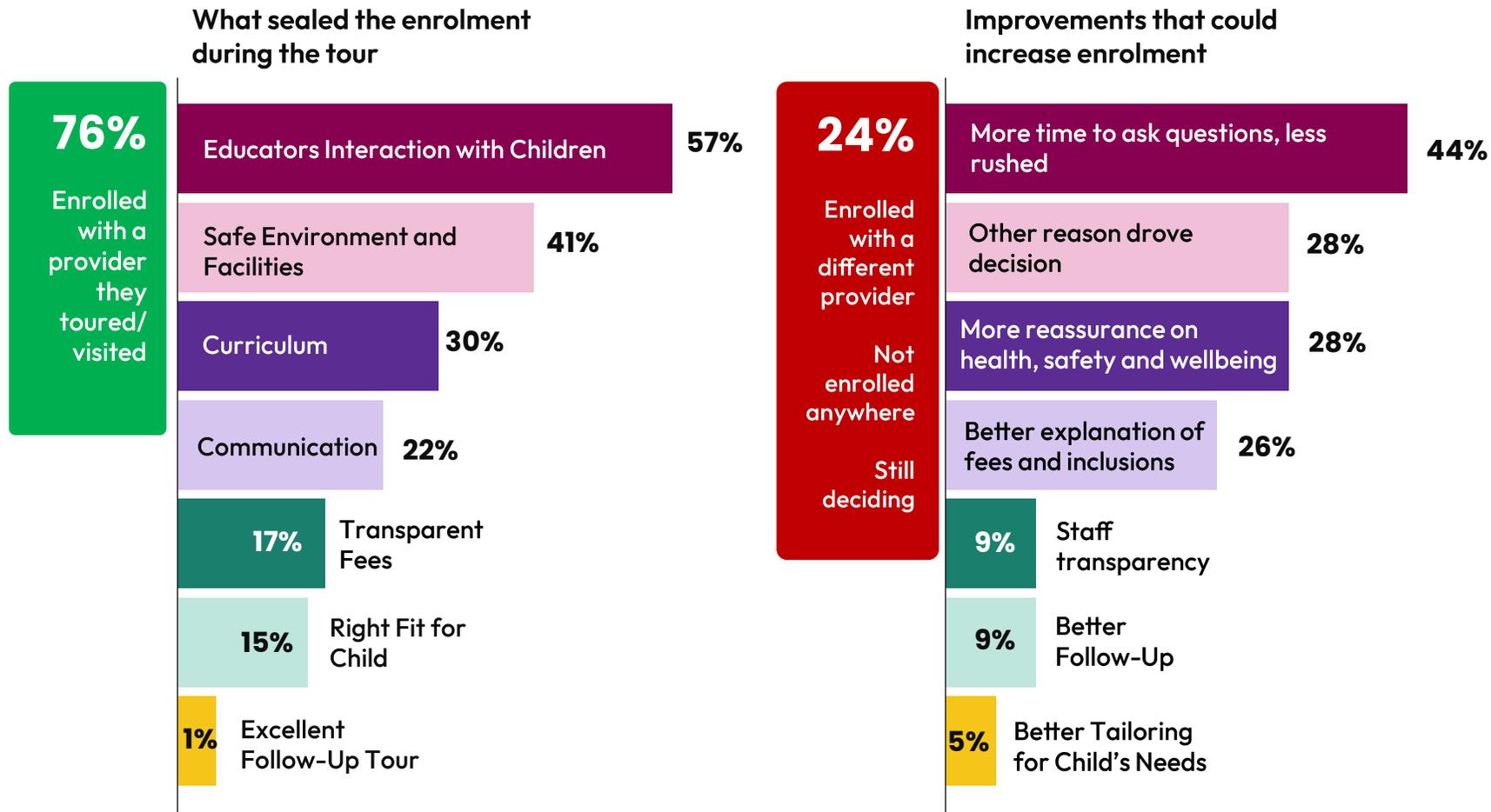
Once **families step into another centre**, the risk increases, as **exposure to alternatives** reopens the decision process and **reintroduces competitive influence**.

# Strengths and opportunities across the tour journey



The **biggest opportunity** lies in **structured objection handling**. Families want **more questions** asked and **more space to surface concerns**, rather than a purely friendly but passive tour experience.

# Unlocking the full conversion potential of centre tours



**Conversion** is most strongly influenced by observed educator-child interaction, followed by safety, curriculum and communication.

**Non-conversion** is primarily driven by **feeling rushed** and **not having enough space to ask questions**, rather than major service gaps.

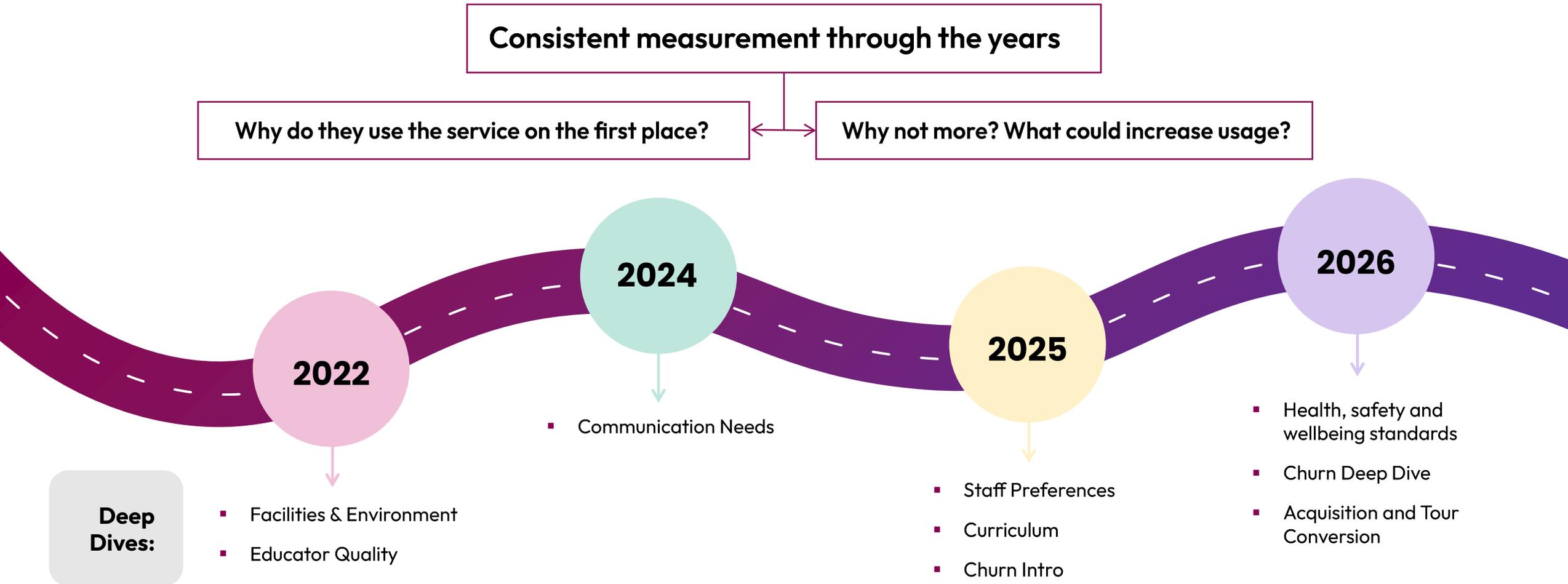
## PART 3

# Family Segments: Who Uses Childcare & Why?

- ✔ Personas: Explorers, Balancers, Partners
- ✔ Differences in usage pattern
- ✔ Main drivers of attendance
- ✔ Retention risks



## The journey so far: how our understanding has evolved



FAMILY SEGMENTS:  
WHO USES CHILDCARE  
& WHY?

## The Personas

The three personas are behavioural segments, meaning usage patterns, and attitudes matter more than income or background alone.

### Who's in the Decision Seat?



**Explorers**  
(Seeking Value)

~2 Days



**Balancers**  
(Not fully Convinced)

3 Days



**Partners**  
(Essential Need  
and Convinced)

4-5 Days



#### WORK STATUS

3 in 5 working full time



4 in 5 working full time

#### INCOME

Middle income bracket



High income bracket

#### INDUSTRY

Healthcare and Social Care

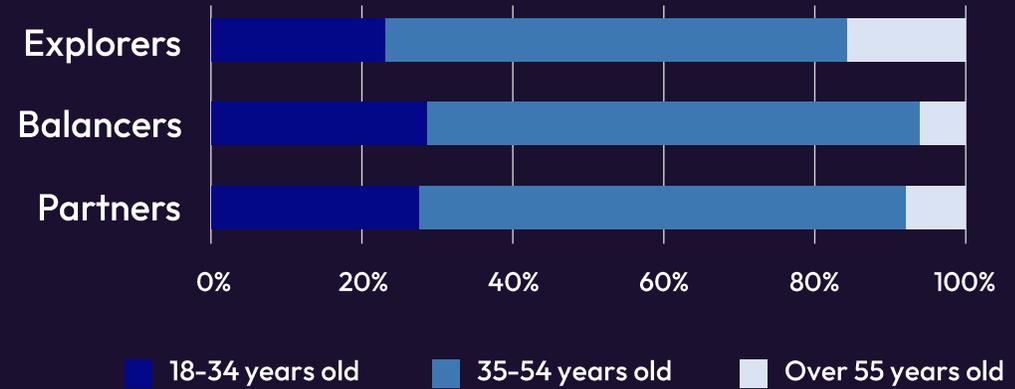


Finance and Insurance, Education

FAMILY SEGMENTS:  
WHO USES CHILDCARE  
& WHY?

# Demographic Breakdown

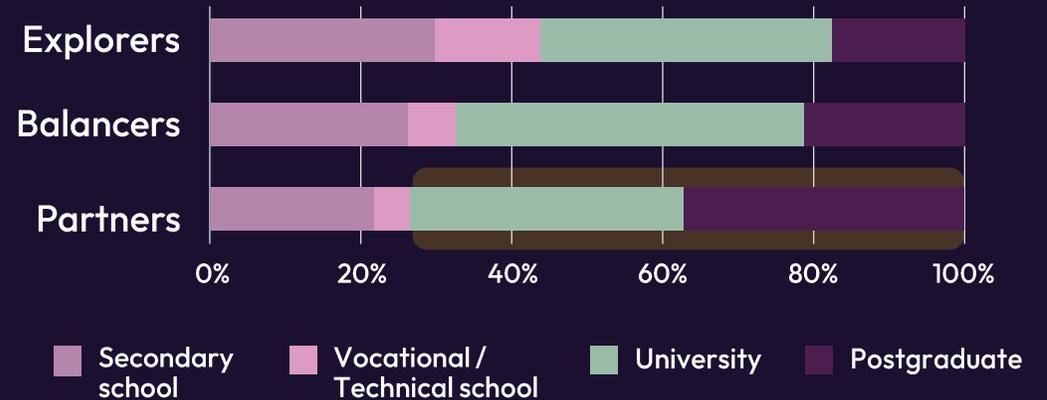
## AGE OF RESPONDENT



## INCOME



## EDUCATION



FAMILY SEGMENTS:  
WHO USES CHILDCARE  
& WHY?

## Recap: The Explorer



Low-frequency users  
**1-2 Enrolled Days**

### THE SETUP

Hybrid routines with  
informal care still active.

### DECISION STATE

Testing Trust

### THE TENSION

Wants progress without  
losing control or flexibility.

### THE MOMENT

Value must be visible early.

### WHY IT MATTERS

If proof is delayed, usage stays  
temporary and churn risk increases.

### MAIN DRIVERS

Work-life balance, affordability,  
and structured childcare.

### KEY BARRIERS

Cost concerns, availability of  
other care options, and less  
emphasis on structured learning.

*“I want to see  
how this fits  
before I depend  
on it.”*

FAMILY SEGMENTS:  
WHO USES CHILDCARE  
& WHY?

## Recap: The Balancer



Mid-frequency users

**3 Enrolled Days**

### THE SETUP

Tightly managed weeks with little buffer.

### DECISION STATE

Protecting Stability

### THE TENSION

Reducing mental load while managing cost and reliability.

### THE MOMENT

A small disruption forces re-evaluation.

### WHY IT MATTERS

Everyday consistency protects retention.

### MAIN DRIVERS

Work-life balance, affordability, and structured childcare.

### KEY BARRIERS

Cost concerns, need for experienced (not just qualified) educators, and employer flexibility.

*“This works... as long as nothing changes.”*

FAMILY SEGMENTS:  
WHO USES CHILDCARE  
& WHY?

## Recap: The Partner



High-frequency users

**4-5 Enrolled Days**

### THE SETUP

High dependency on care to sustain work and life.

### DECISION STATE

Care as Infrastructure

### THE TENSION

High standards, low tolerance for friction.

### THE MOMENT

Communication fails around an issue or change.

### WHY IT MATTERS

Trust breaks faster than price.

### MAIN DRIVERS

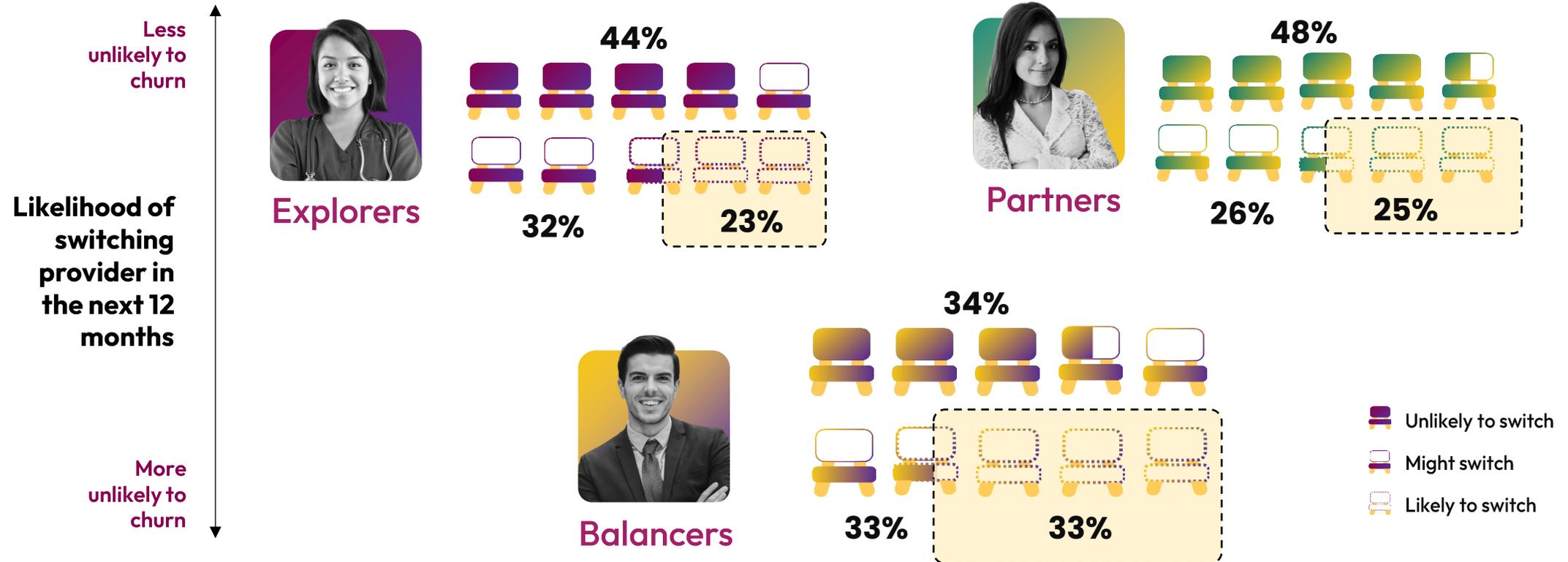
Childcare is essential, prioritising stability, structure, and academic development.

### KEY BARRIERS

High expectations for both qualifications & experience, strong need for provider communication.

*“This has to work. Every day.”*

# Intention to churn – risk across key segments



**Churn risk** is highest among families who are **partially committed** rather than fully dependent, making **mid-frequency** users the most **commercially fragile segment** in the market.

## Distinct churn patterns by persona



Explorers



Balancers



Partners

Churn rate in the last 12 months

16%

18%

18%

Churn timing

Tend to **churn very early** (first 1–3 months) if confidence isn't built quickly.

Clearer churn peak around **4–6 months**, when day-to-day logistics and friction become real.

**More stable over time**; when they churn, it's less about early friction and more about a deeper issue.

Key churn drivers

Staff experience and lack of communication or support.

Health, safety, and wellbeing concerns.

Fees and overall value for money.

## Distinct touring patterns by persona



**Explorers**

Low-intent touring, low comparison, and the weakest conversion.



**Balancers**

Most tour-active, controlled comparison, and best conversion.



**Partners**

High-standards touring, highest comparison, strong conversion but higher walk-away risk.

Attended a centre tour or visit last 12 month

**39%**

**58%**

**46%**

Number of centers typically toured

**1 centre**

**2 centres**

**visit multiple centres**  
(around **1 in 4** do 3+).

# What else characterises each persona?



## Explorers



## Balancers



## Partners



Search profile

Highest reliance on friends/family recommendations

Followed by :

- Google search + provider websites

Most research-driven (High usage of multiple channels)

- Google search
- Online reviews
- Directory sites (*ex: KindiCare*)

Shortlist-led (more focused on fewer channels)

- Google search
- Online reviews
- Recommendations from friends and family



Health, safety and wellbeing

**Lowest** confident in current provider

**Biggest impact:**

Staff experience and training

**Mid** confidence in current provider

**Biggest impact:**

Educator supervision and attentiveness

**Highest** confidence in current provider

**Biggest impact:**

Educator supervision and attentiveness

Different personas search differently, meaning marketing investment shapes which behavioural segment you attract.

FAMILY SEGMENTS:

## Explorers' Opportunity Summary



### Win in the early trust window.

They behave like low-commitment shoppers: lighter search, fewer tours, and weaker conversion after visiting.

Switching risk is less about price and more about whether the experience feels clear, supported, and trustworthy quickly.

The upside sits in turning “trial use” into confidence-led commitment.

The opportunity with Explorers lies in securing trust early, as their routines and work patterns are not yet committed and can easily shift.

FAMILY SEGMENTS:

## Balancers' Opportunity Summary



### Protect the routine once real-life kicks in.

They're the most engaged evaluators (heavier research, highest tour activity) and tend to convert, but churn pressure rises when day-to-day friction shows up.

Practical factors (access, hours, availability) matter more here, with safety/wellbeing reassurance acting as a key stabiliser.

Small reliability gains can have outsized retention impact in this segment.

The opportunity with Balancers is to protect routine stability, as friction in an already complex schedule quickly triggers re-evaluation.

FAMILY SEGMENTS:

## Partners' Opportunity Summary



### Reinforce value and standards over time.

They shortlist efficiently but are the most likely to tour multiple centres, signalling higher standards and active comparison when they're in market.

Churn is less concentrated early and links more to value-for-money and quality cues (trust, consistency, issue handling).

Retention is shaped by sustained confidence, not one-off impressions.

Partners require ongoing reinforcement of value, as their high financial commitment demands visible proof that standards and child development outcomes justify the spend.



PART 4

# The Ideal Childcare: What Families Want

- ✔ Desired features
- ✔ NPS trends & loyalty potential

# The Path to Increasing Frequency



**36%**  
Lower  
Overall Fees



**25%**  
Flexible  
Pricing



**25%**  
Stronger Health,  
Safety and  
Wellbeing Standards



**24%**  
More Qualified  
Educators



**19%**  
Easier Pick-Up  
and Drop-Off



**19%**  
Availability of Quality  
Holiday Program



**22%**  
Better  
Curriculum



**17%**  
Pro-active  
Communication



**16%**  
Extended Pick-up  
Time at No Extra  
Cost



**16%**  
Better  
Facilities

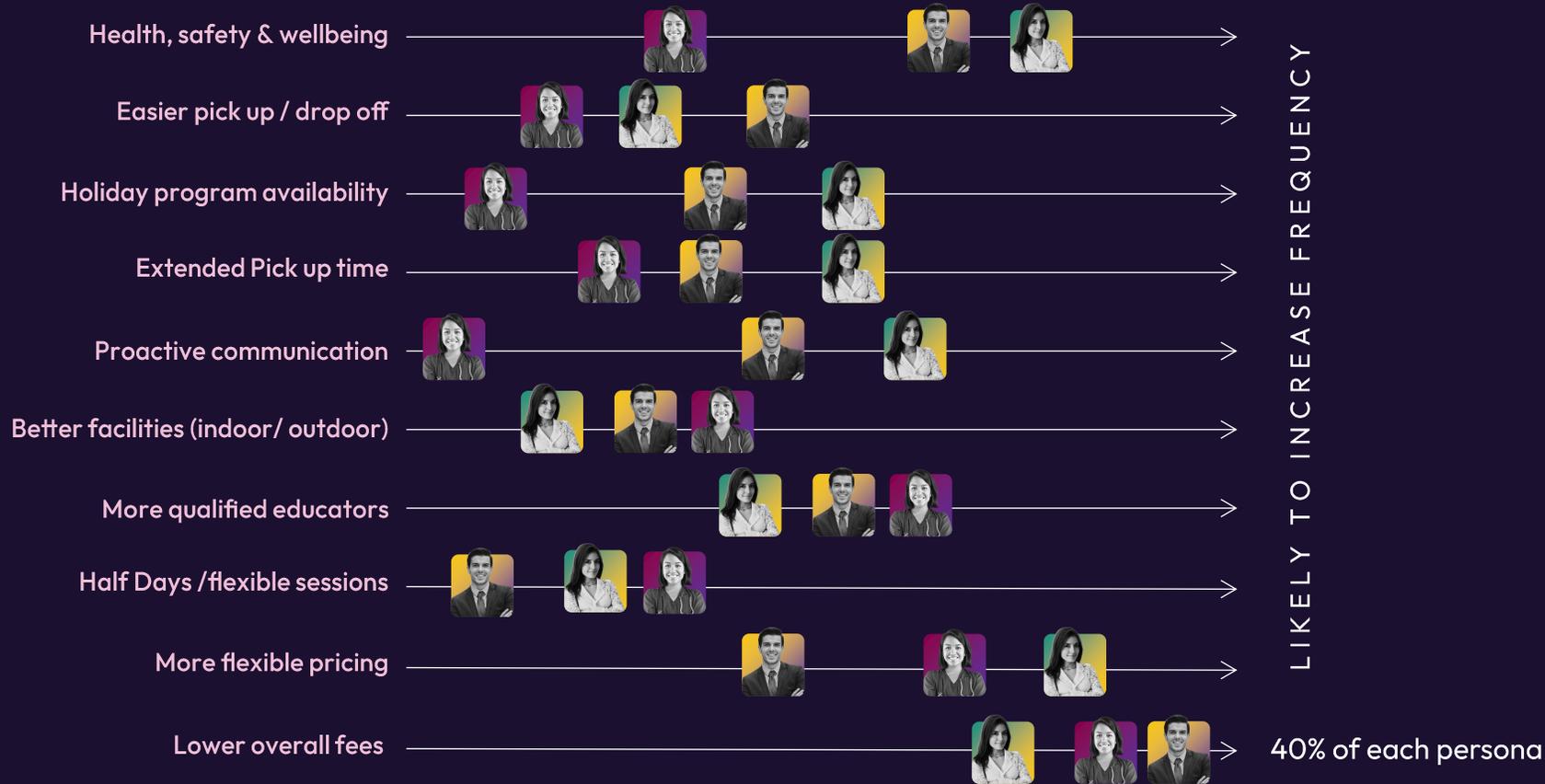


**13%**  
Half-days or  
More Flexible  
Session Times

Increasing frequency is less about aspiration and more about reducing financial and logistical friction.

The perception of flexibility can be as influential as structural flexibility, because families are seeking reassurance that their commitments can adapt to changing work and life circumstances.

# Levers that help increase frequency



LIKELY TO INCREASE FREQUENCY

Families are willing to pay more when the service meaningfully reduces stress and complexity in their daily routine.

The premium is for ease and simplicity.

- Explorer 
- Balancer 
- Partner 



# Beyond the basics: what families want next – Top Childcare Themes

## Hours & Flexibility

“A flexible pick-up/drop-off service that adapts to parents’ changing schedules, making mornings and evenings less stressful and giving families more quality time together.”

“Real-time availability & flexible bookings. It would turn childcare from a stress-management exercise into a genuine support system.”

## Learning & Development

“More education lessons to prepare them for school.”

“Helps develop a child's creativity, curiosity, and independence.”

## Food & Nutrition / Life Skills

“Better healthier food and more structured routines.”

“Greater nutritional programs”

## Communication & Updates

“Automated daily/weekly summaries of activities and learning, with photos, sent via a secure app. This would matter because it provides peace of mind and allows parents to feel connected to their child's day even when they can't be there.”

“Having an easily accessible apps by parent so they could monitor the day-to-day activities of how their kids are being taken care of”

## Safety & Wellbeing

“High security and safety measures to protect kids.”

“Knowing that they are being looked after by well trained and safe staff.”

## Fees & Affordability

“Not charging for public holidays or days when the centres are closed!!”

## Staffing & Support

“I would try to reduce the staff to children ratio from. 1:4 to 1:3 for better quality control.”



# Beyond the basics: what families want next – Top OSHC Themes

## Hours & Flexibility

“I would pay a bit more if they would offer a service for drop off. Sometimes if finish late, and traffic can play a huge factor, especially if I am 30 minutes or an hour late which has happened. So, if there was a possibility of drop-off I would take.”

“Extend pick - up time and why because out of any unforeseen circumstances my child will be safe with them”

## Food & Nutrition / Life Skills

“I want a health, simple dinner –sometimes parents are tired to cook dinner at home. Second, supervised homework or quiet learning time.”

## Fees & Affordability

“A flexible last-minute booking and cancellation system with real-time availability would make weekly family life easier because it reduces stress when work schedules or family plans change unexpectedly.”

## Learning & Development

“Teaching topics that school doesn’t necessarily teach or explain home chores, helping with homework, manners, healthy relationships and friendships etc.”

“Assistance with homework so it doesn’t need to be done when child gets home”

## Safety & Wellbeing

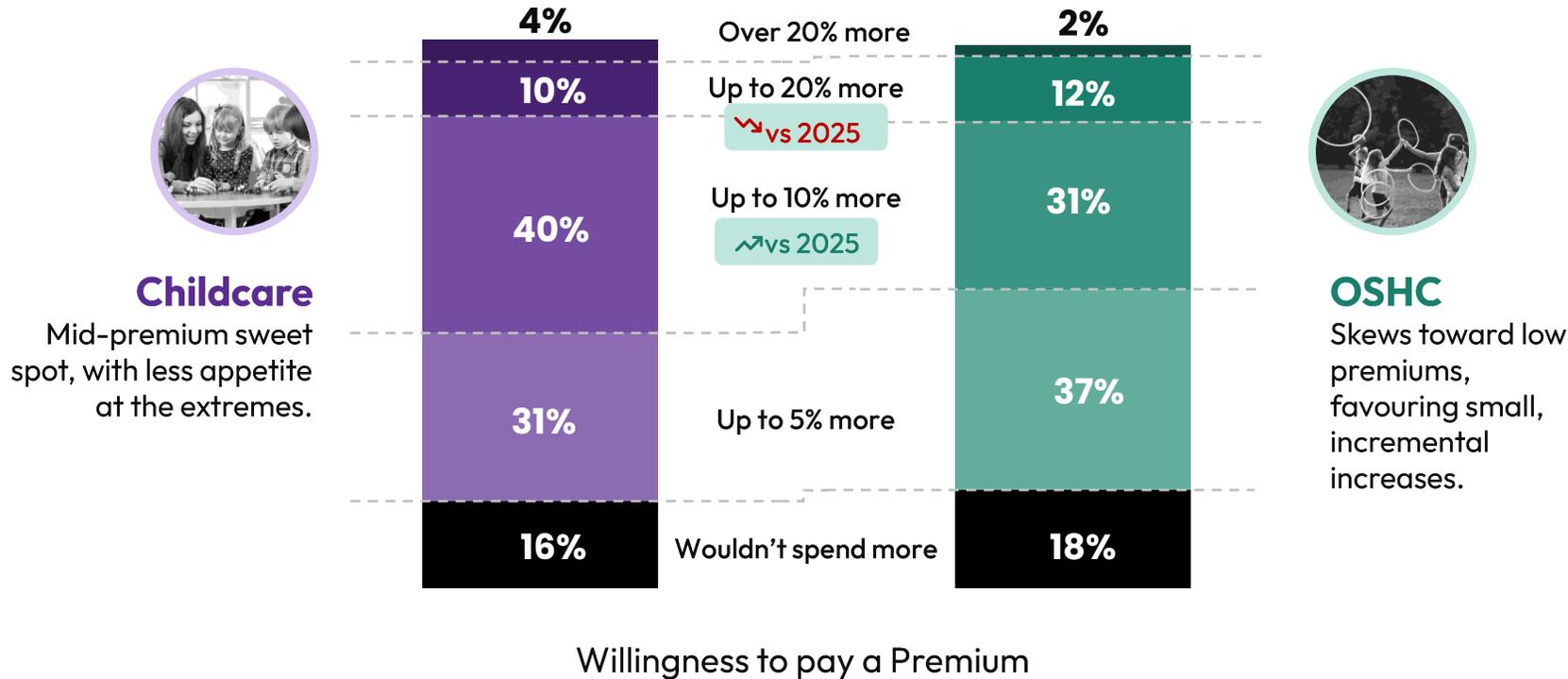
“Keeping in regular contact with parents about their child’s progress and being as transparent as possible about hygiene and safety practices.”

## Communication & Updates

“A flexible real time scheduling so parents can easily adjust bookings and receive updates.”

# Premiums in the Dream Experience

Service Breakdown



Majority of families say they are willing to **pay a premium** not for price alone, but **flexibility, ease, and key value** drivers are **genuinely delivered**.

# Unlocking Value in the Dream Experience

## Persona Breakdown



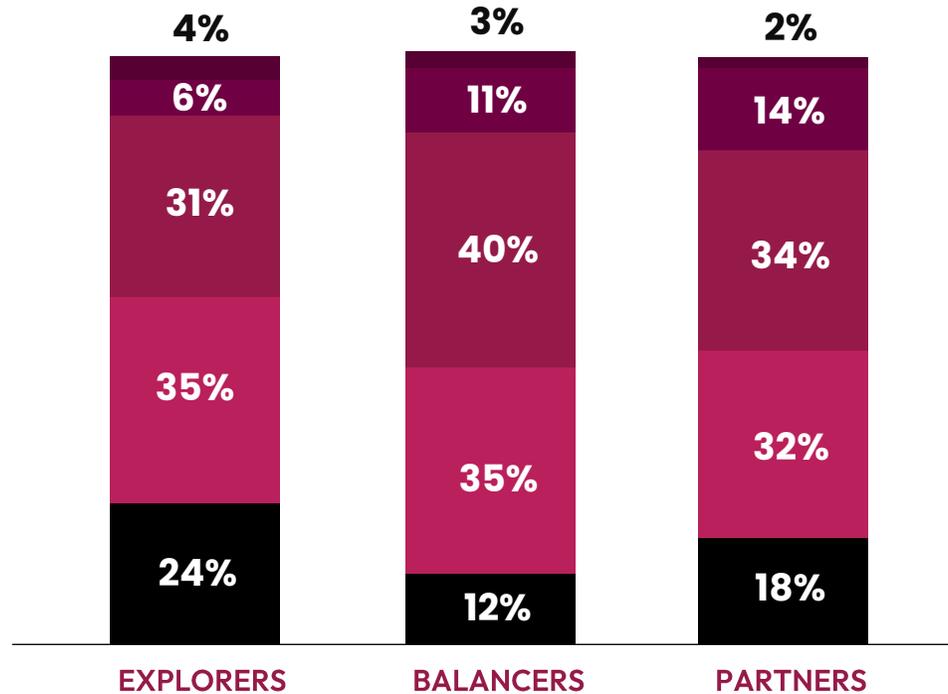
### Explorers

Lower willingness to pay, prioritising value and getting the basics right before paying extra.



### Partners

Comfortable with moderate premiums when value and cost feel balanced.



Willingness to pay a Premium



THE IDEAL CHILDCARE: WHAT FAMILIES WANT

## Advocacy by Persona: Co-Relation

# +14

is the overall NPS of respondents with their respective providers, which is 49 points lower than the NPS of Resonate CX's ANZ customers.

The variability in advocacy isn't a risk — it's the opportunity. In a fragmented experience market, investment in CX converts directly into share gain.



**Explorers**  
**-4**



**Balancers**  
**+12**



**Partners**  
**+25**

**NPS**

**OSHC**

**+12**

**+15**

**Childcare**

### Last quarter CX Focused Providers



\*Resonate Relationship Benchmark  
Weighted average NPS, Q4 2025 (10K+ responses)

POWERED BY  
**resonate**

## Our Experts



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Chief Executive Officer,  
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**Joris Dries**  
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The insights presented in this report are based on a survey conducted with a 95% confidence level and a margin of error of  $\pm 5\%$ .

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Clever Tech. Measurable Growth.

## Unlock Childcare Growth



**Increase Conversion**  
Optimise the Sales Journey



**Product & Service Development**  
For Value Added Services



**Increase Market Share**  
Win in a Highly Competitive Environment



**Increase Recommendation**  
Greater Customer Lifetime Value



**Experience is the Differentiator**  
Move away from Price Competition



**Reduce Complaints and Churn**  
Turn Detractors to Promoters



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