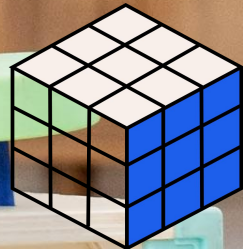


STATE OF EARLY CHILDHOOD INVESTING



Early childhood education technology is
about investing in the **future of families.**

Modern, inclusive solutions for families and caregivers.

Family Technology is a **big market**

Contrary to popular belief, early childhood is a large market that will continue to grow

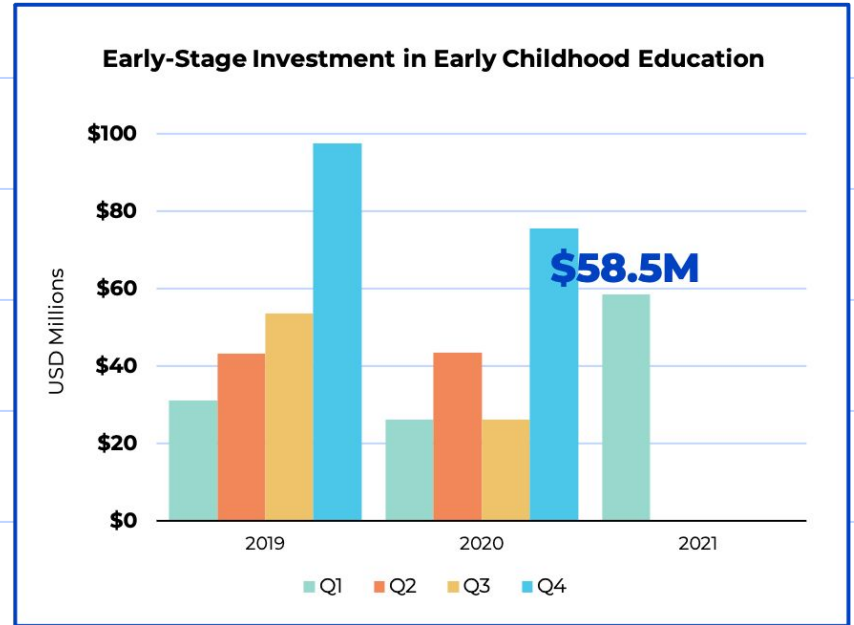
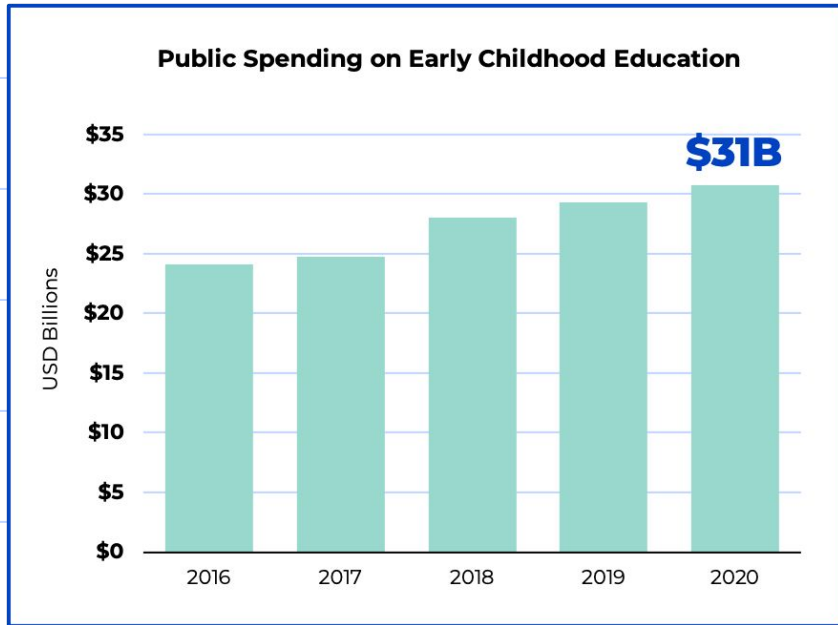
\$46B
Family Tech

\$480B
Early Childhood
Education

\$4.3T
Family Spending

Investment in Early Childhood Is Growing

In both the public and private sectors



Millennials Are Now Parents

They care deeply about being good parents and seek digital solutions

90%

of all new parents
are **Millennials**

60%

of all Millennials say **having children is central to their identities**; being a good parent is more important than a successful marriage

71%

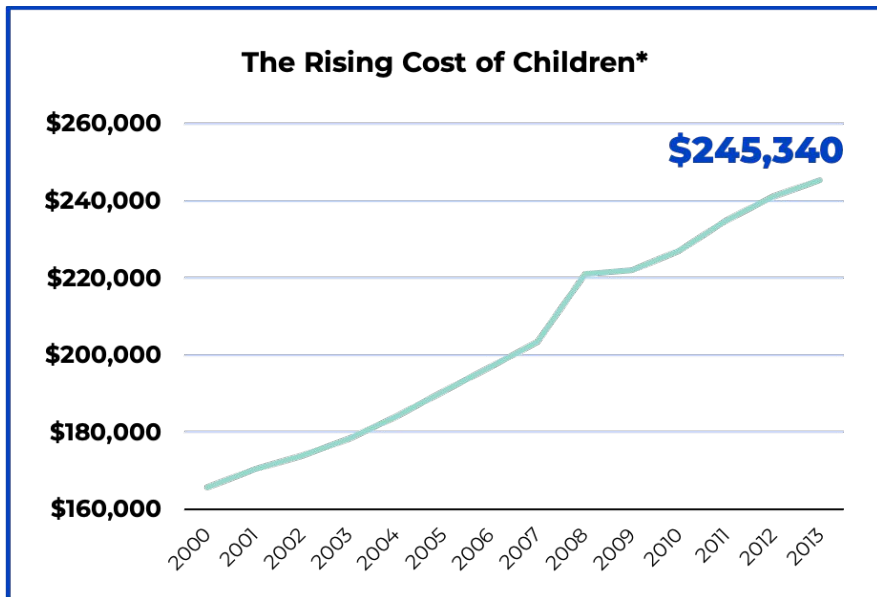
of Millennial parents
cite online sources as top influences

2/3

of children under 5 live in homes where **both parents work**, compared with <1 in 10 in 1940

Parenting Costs Are Rising and Unsustainable

And demand far outstrips supply for quality care



40%+

Increase in cost of raising a child since 2000

1/3

Of families spend **20%+ of their income** on childcare

\$10K

Avg. cost of childcare—more than college tuition in 33 states

62%

Of families say it's **hard to find** affordable, quality childcare

10%

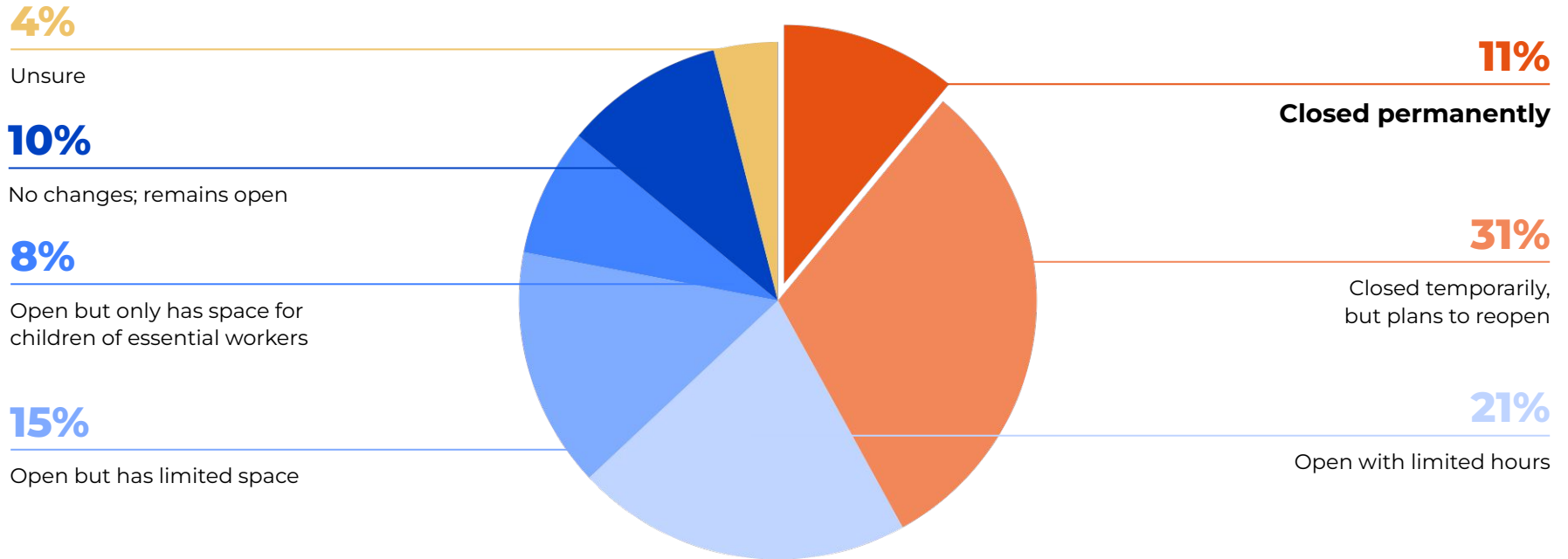
Of **providers are considered high-quality**; average salary is \$14/hr

<50%

Of families are in **formal care settings**

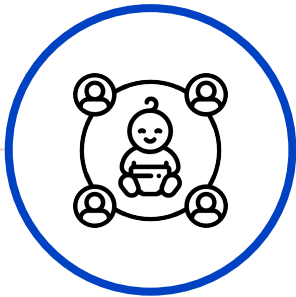
COVID Magnifies the Unmet Needs of Families

Current operating status of childcare providers as of December 2020

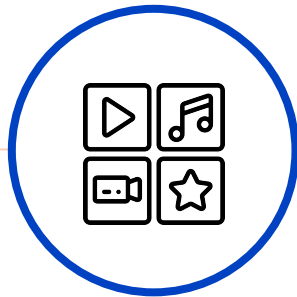


Family Tech Can Help Address These Needs

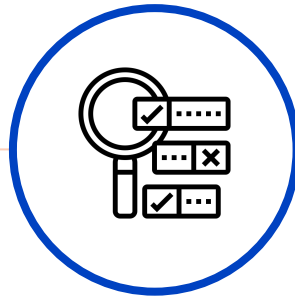
Technology can help scale quality and dramatically reduce costs



**Parent Support
and Education**



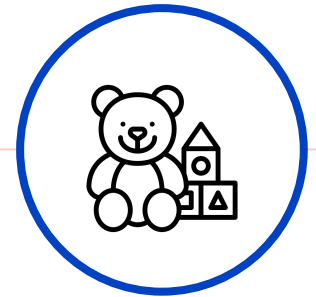
**Home
Learning**



**Search and
Discovery**


















**Daycare/Preschool
Software**

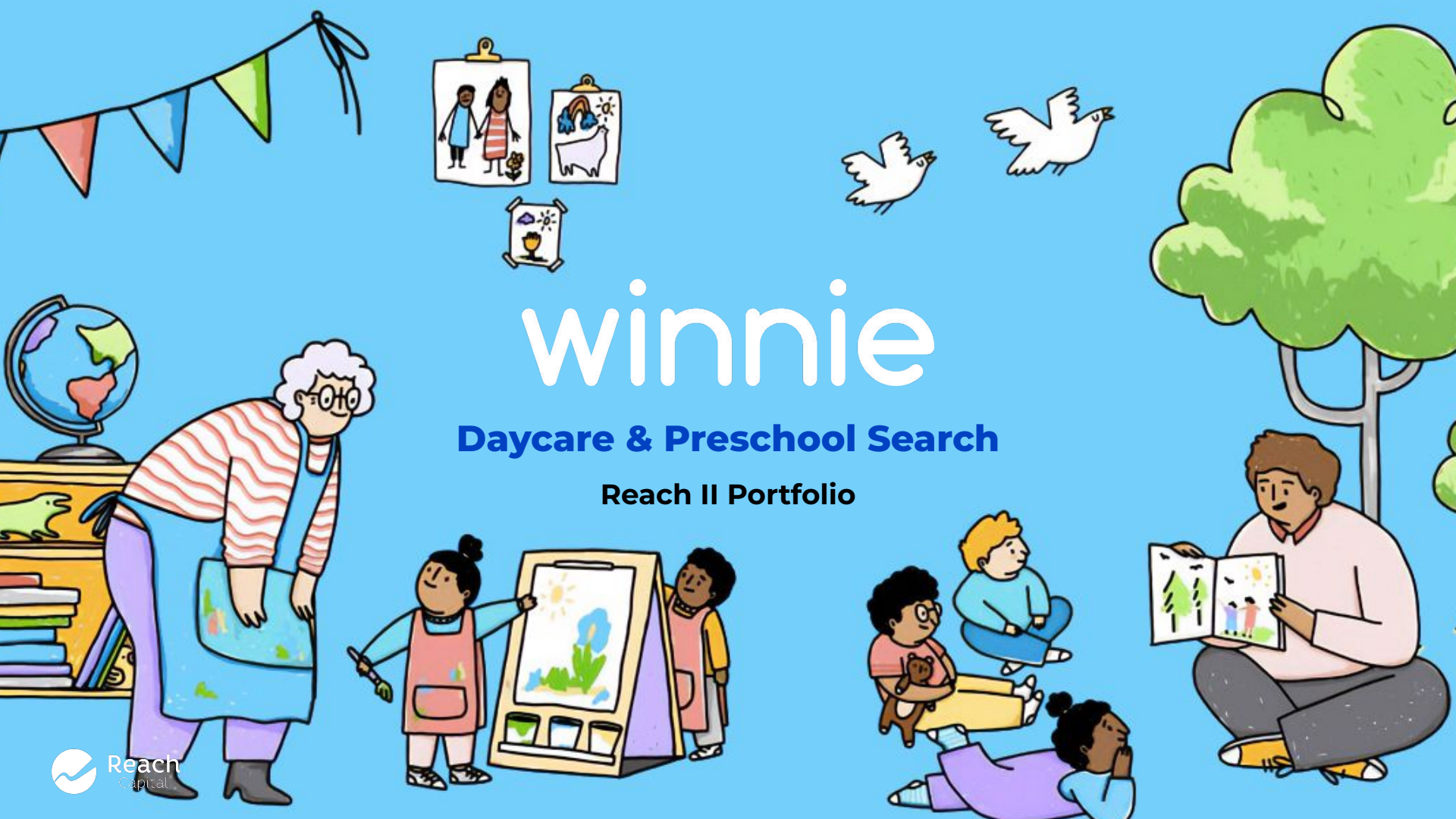


**New Care
Models**

Family Tech Can Help Address These Needs

Illustrative companies by category

Parent Support and Education	Home Learning	Search and Discovery	Daycare/Preschool Software	New Care Models
 guardians collective	LOVEVERY.	winnie	Kaymbu	tinkergarten 
June	beanstalk	Kinside	 brightwheel	brella
Oath	 Ready Rosie	 BRIDGECARE	Kangaroo  time	 Wonderschool
robyn	BümoBrain	Care.com	 ChildcareCRM	 WeeCare
TINYHOOD	 circletime	 urbansitter		MyVILLAGE
 weldon	kinedu			vivvi
 Peanut	 BabySparks			TINYCARE
 HEYMAMA				
Cleo				



winnie

Daycare & Preschool Search

Reach II Portfolio





CANCEL

Kaymbu

Kaymbu

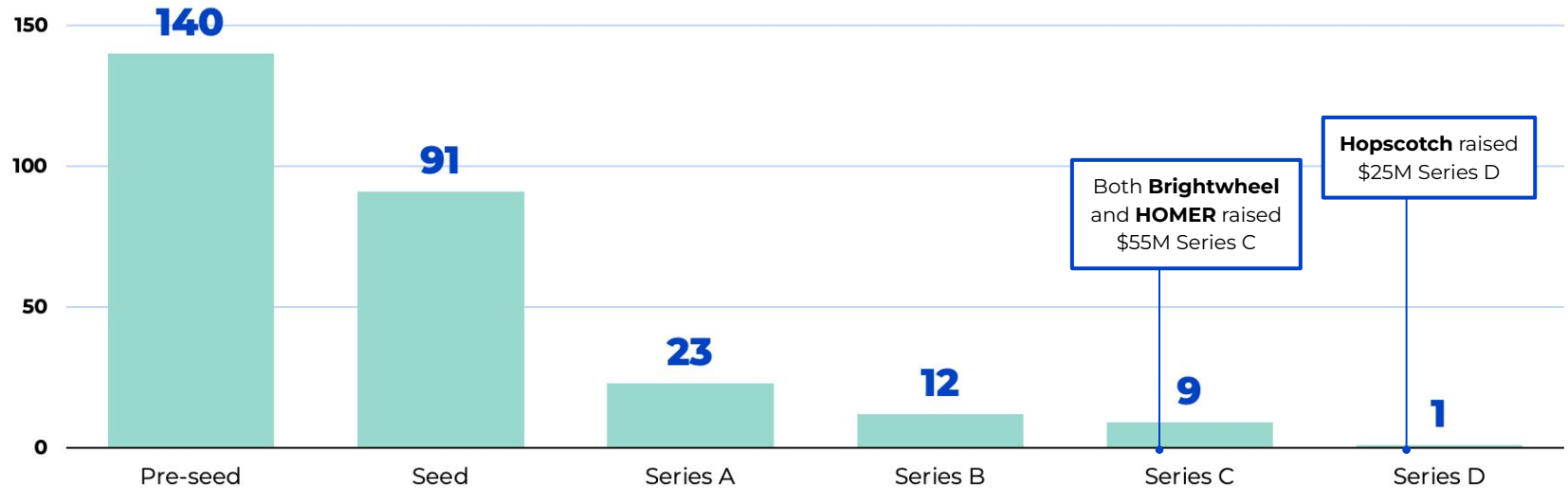
Care Management Software

Reach | Portfolio

This Category Is in Its Infancy

Now is the time to invest in early education companies

Number of VC Deals by Series



The Opportunity Ahead



Parent support and education

that enable **learning in community**—bringing a parent’s village online and dramatically increasing access to expertise



Software tools

that streamline and simplify operations for early childhood providers so they can spend more time on quality care and less on overhead



New care models

that fill the growing care gap, particularly ones that **empower families and early childhood educators**

Thank You.

