



Child Care in 25 States: What We Know and Don't Know

Quantifying the Supply of, Potential Need for, and Gaps in Child Care Across the Country

October 26, 2020



Background

- There is broad bipartisan support for child care at all levels of government
- But little is known about the amount of care the country actually needs

BPC asked...

How much additional child care does the country need?



What BPC Did

Quantified the supply of, potential need for, and gaps in child care in 25 states as of 2019

The analysis gives policymakers, advocates, and stakeholders

- A baseline from which to devise strategies to strengthen the quality of and access to child care
- A critical tool for holding federal, state, and local leaders accountable for improving child care access
- An evidence base to use data rather than anecdotes to evaluate the need for care



Products of the Analysis

Interactive Mapping Tool

- Quantifies supply, potential need, and gaps by:

State County Congressional District

State Senate District Metropolitan Area Opportunity Zone

- Also includes breakdowns by:

Minority Population Under/Above 85% of State Median Income

Below Poverty Line

25-State Report

- Detailed methodology / National findings
- How to properly interpret gap findings for policy purposes
- Recommendations for how states can optimize data collection



Project Overview: State Advisory Committee

Committee Member	State
Samantha Aigner-Treworgy Department of Early Education and Care	MA
Nichole Anderson Department of Family Services	WY
Crystal Arbour Office of Child and Family Services	ME
Jill Bushnell Child Care Collaborative Task Force	WA
Patty Butler Department of Public Health and Human Services	MT
Tracey Campanini Office of Child Development and Early Learning	PA
Tracey Gruber Office of Child Care	UT
Chris Jones Department of Human Services	ND
Lori Masseur Early Childhood Education and Head Start Collaboration Office Nicol Russell Teaching Strategies	AZ
Jeana Ross Department of Early Childhood Education Julie Preskitt Associate Professor of Health Care Organization and Policy, The University of Alabama at Birmingham School of Public Health	AL
Kristi Snuggs Division of Child Development and Early Education	NC
Nicole Vint Department of Health and Human Services	NE

All methodological decisions were agreed to by a committee of 12 state child care officials

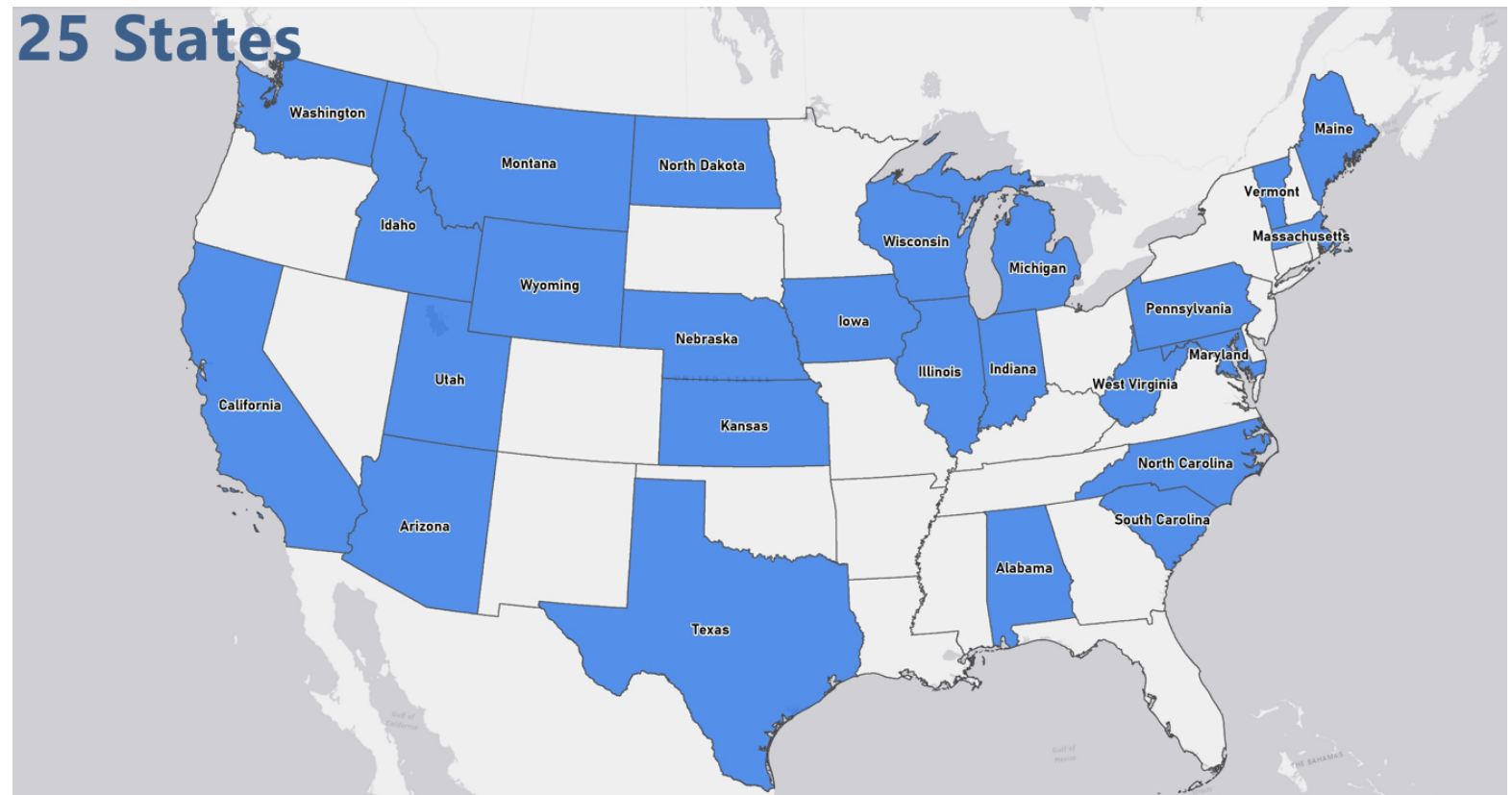
Provided high-level guidance:

- Developing definitions
- Identifying data resources
- Reviewing analytics
- How to present results

Project Overview: 25 States

- Originally set out to map access in all 50 states
- 25 states were complete when the pandemic prompted stay-at-home orders in March and BPC halted the analysis

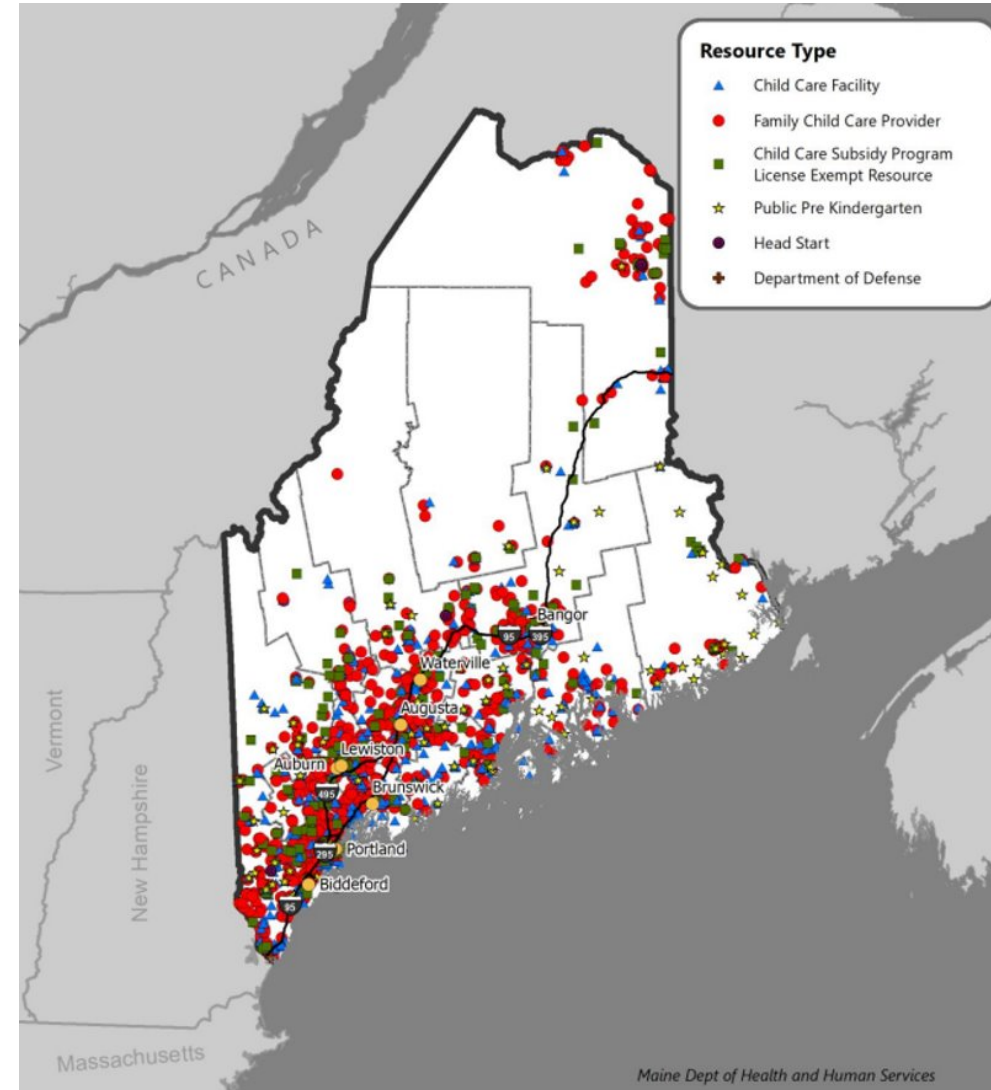
**Politically and
geographically
diverse 25 states**



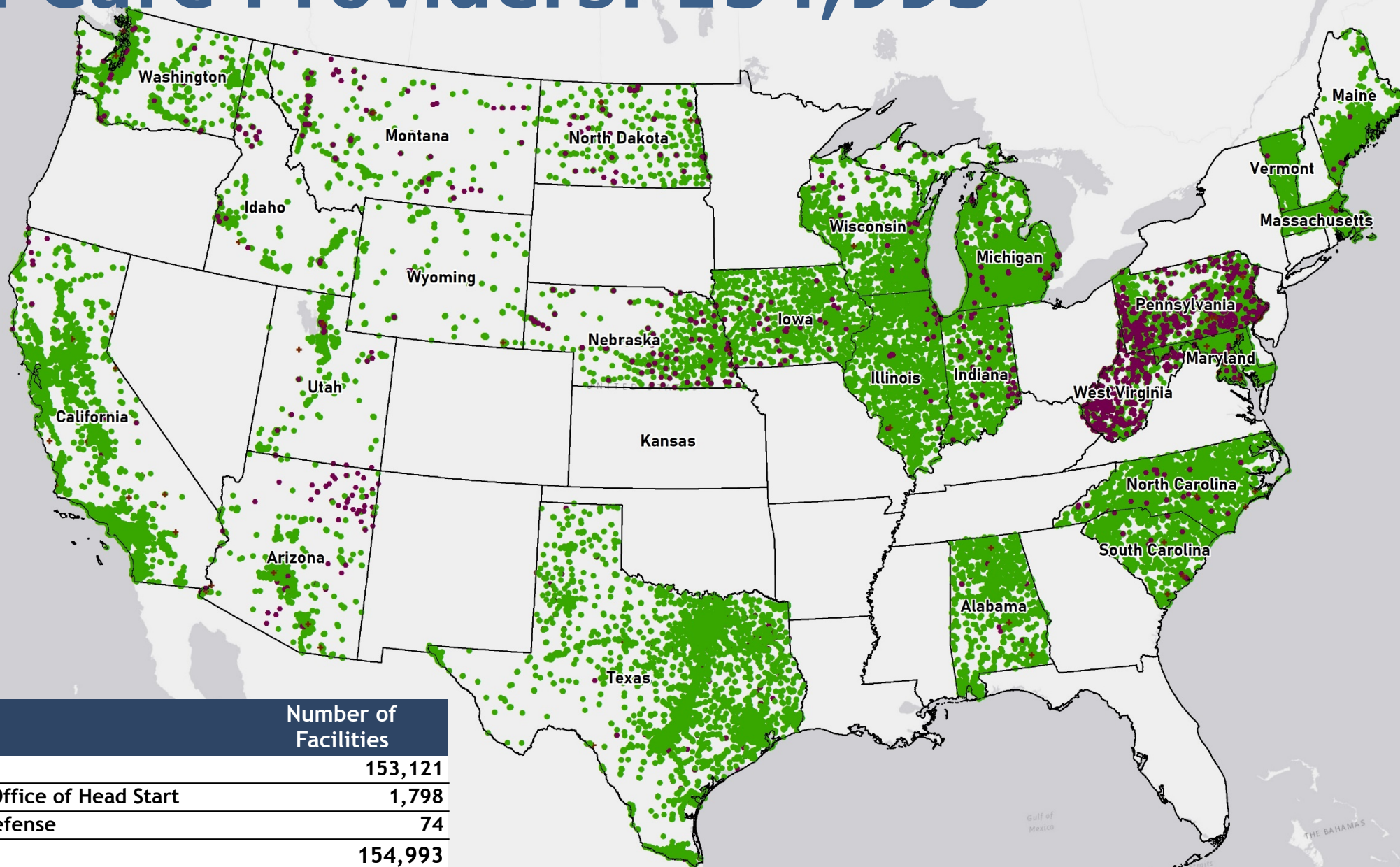
Project Overview: Mapping Supply

Supply: The number of child care slots offered by legally operated and state-recognized providers

- Definition included the entire range of formal child care settings available to parents
- To build datasets of each provider's location and capacity, BPC worked with:
 - Each state's child care and education agencies
 - Federal DHHS for Head Start data, AIAN tribes for tribal data, and DOD for military data
- Data was only incorporated after state approved



Child Care Providers: 154,993

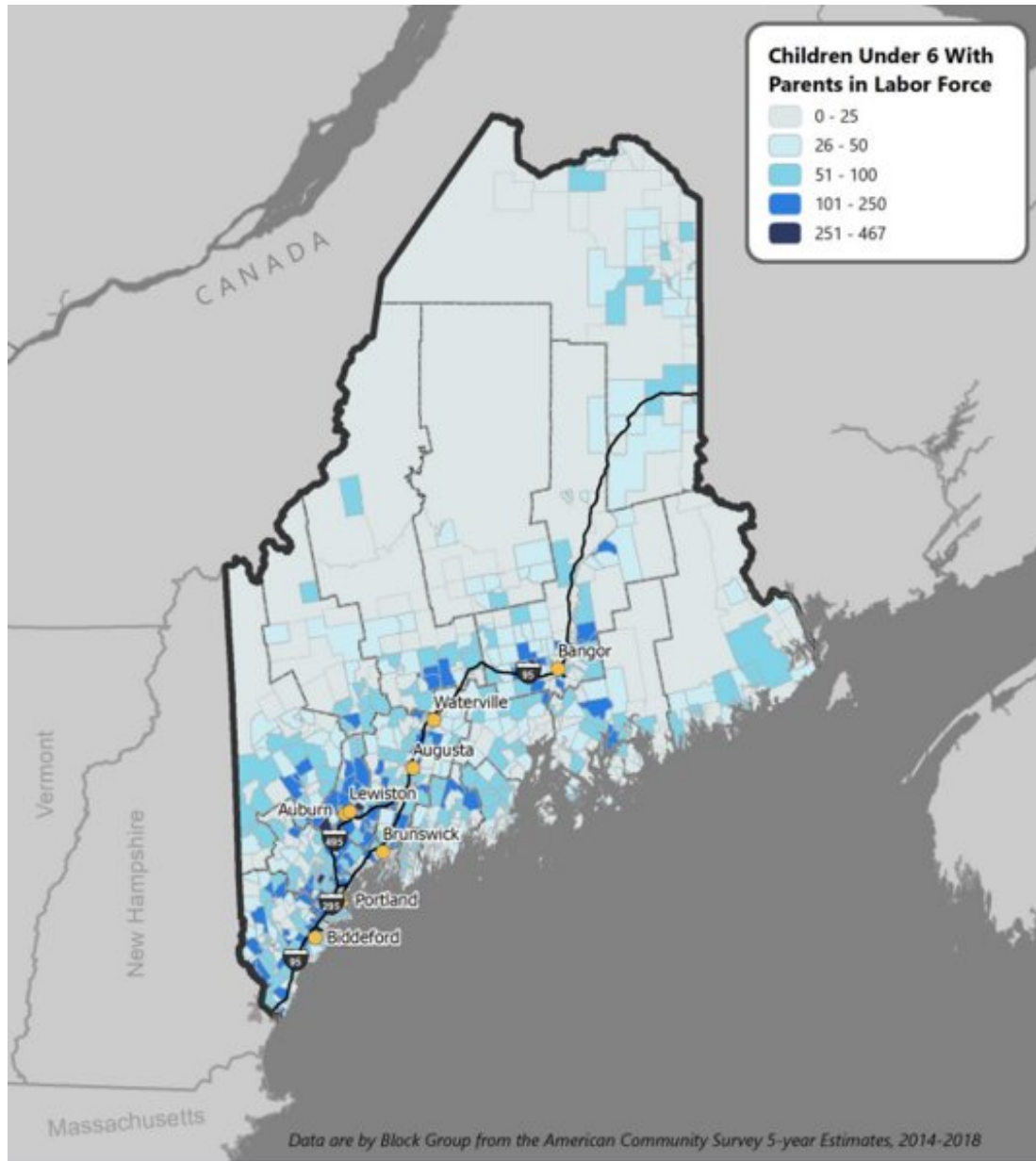


Source	Number of Facilities
State Provided	153,121
Additional from Office of Head Start	1,798
Department of Defense	74
TOTAL	154,993

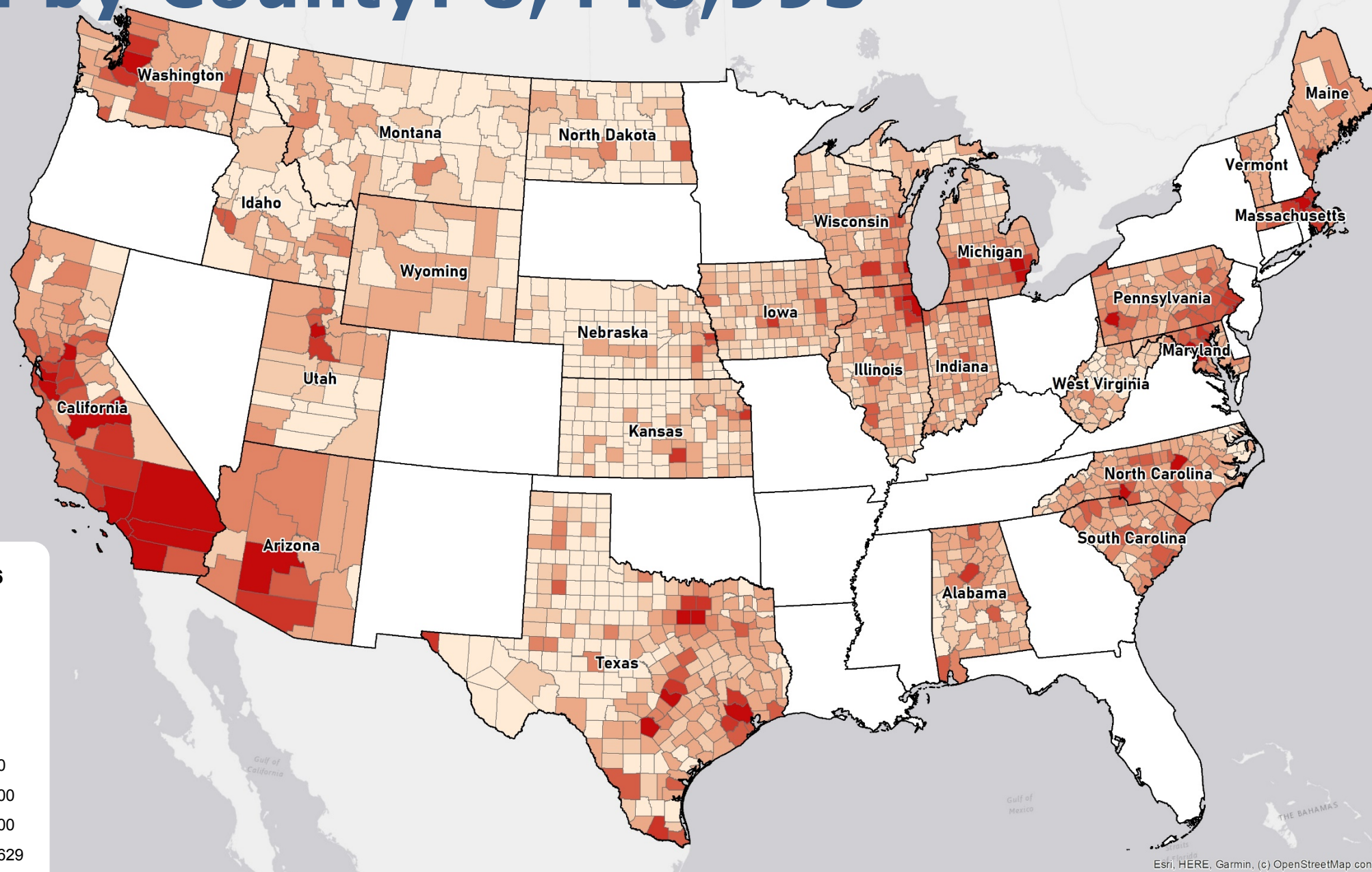
Project Overview: Mapping Potential Need

Potential Need: The number of children under six with all available parents in the labor force

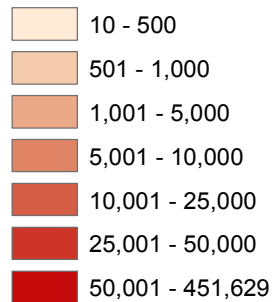
- Not Demand: the rate at which families actually utilize or look for formal child care
 - May seasonal/family-related factors influence demand
 - No available data by geographic area
- Informative starting point for policy recommendations
- But interpretations must consider data on how much and what types of care communities actually use



Need by County: 8,448,993

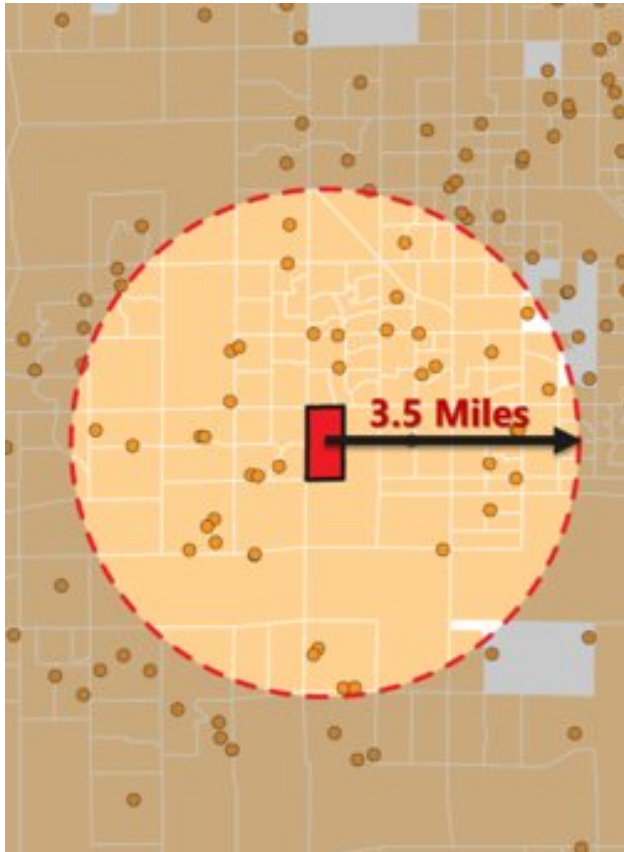


Children Under 6
With Parents in
Labor Force -
County



Project Overview: Measuring the Gap

Gap: The number of children who potentially need care but whose families cannot reasonably access formal care by driving



Incorporated parent choice data: 86% of parents drive to child care; rural parents are much more likely to drive over 10 miles for child care

Step 1: each census block group was assigned a services area of a specific driving radius Urban Areas: **3.5 mi** Rural Areas: **10 mi**

Step 2: assumed families in a given block group could access the facilities within their service area

Step 3: potential need proportionally allocated to child care providers within service area until all provider capacity was filled

Step 4: quantified the number of children without access to child care by location

Understanding Parent Choices to Interpret Findings

Any policy recommendation based on gap data must consider how much and what types of child care parents and families actually use

**Potential Need \neq Actual
Demand**

Must interpret gap findings in conjunction with real parent choice data

What proportions of parents in your community...

- Need care at non-traditional hours?
- Prefer formal vs informal care?
- Prefer certain types of formal child care?

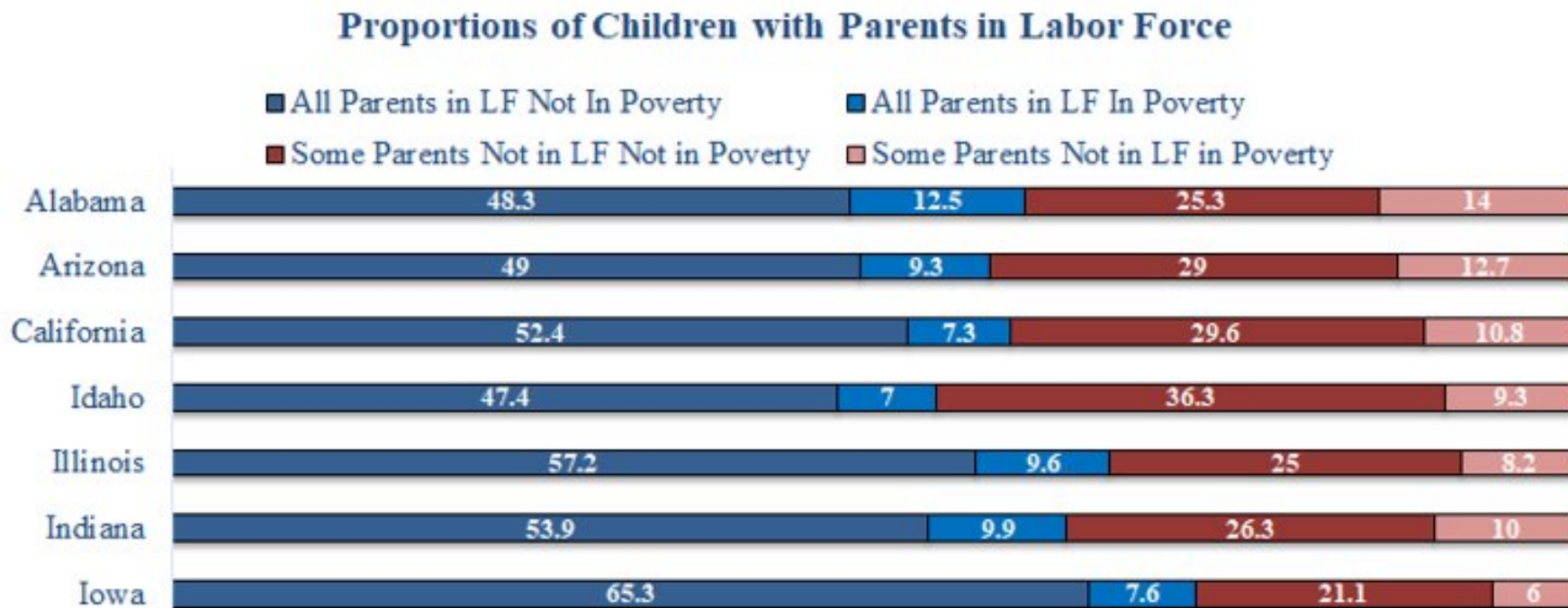


Cultural Values Influence the Gap

Some communities place great value on caring for children within their families, rather than opting for formal child care

The analysis was susceptible to estimating higher gaps in these communities

- Some gaps may have less serious implications for families in real-life



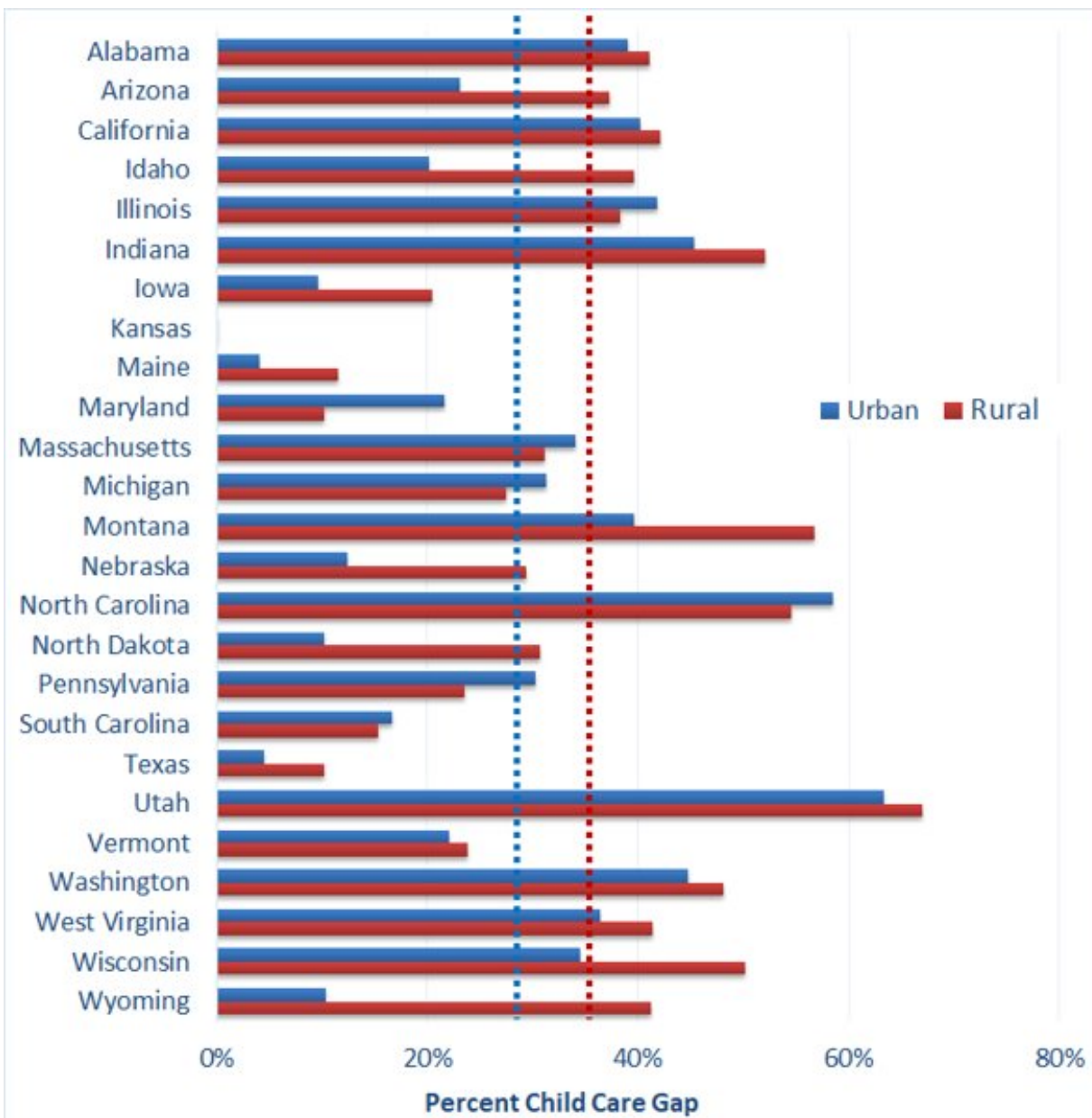
High-Level Findings

Child Care Gap Findings Across 25 States in 2019	
Potential Child Care Need	8,448,993 children
Child Care Supply	5,901,319 slots
Child Care Gap	2,682,262 children
Percent Child Care Gap	31.7% of children

**This estimate orients us around the magnitude of the child care gap
But the gap is not uniform across the country**



Disaggregating the Data: Rural vs Urban



Rural areas were underserved far more often than urban areas (even after using the distance adjustment)

Urban Avg: **28.9%**

Rural Avg: **35.1%**

National Survey Data:

- Only 38% of rural families said finding quality child care within their budget was easy (over 50% for urban)

Still unclear about the extent to which preferences for family/friend care reduce supply in rural areas

Disaggregating the Data: Opportunity Zones

Opportunity Zones: Low-income communities designated by the Tax Cuts and Jobs Act of 2017 in which investors can receive tax incentives for supporting economic development.

The availability of child care should be part of any discussion related to investments in Opportunity Zones

Child Care Gaps within Opportunity Zones			
State	Total State Gap	Total Gap in OZs	Number of OZs
Alabama	40.0%	36%	158
Arizona	25.2%	33%	168
California	40.4%	45%	879
Idaho	28%	23%	28
Illinois	41.2%	40%	326
Indiana	47.7%	48%	156
Iowa	15.1%	19%	62
Kansas	35.5%	NA	NA
Maine	9.2%	14%	32
Maryland	20.0%	21%	149
Massachusetts	33.8%	34%	138
Michigan	30.2%	30%	288

Child Care Gaps within Opportunity Zones			
State	Total State Gap	Total Gap in OZs	Number of OZs
Montana	48.6%	49%	25
Nebraska	18.5%	20%	44
North Carolina	57.0%	57%	252
North Dakota	21.4%	12%	25
Pennsylvania	28.7%	24%	300
South Carolina	16.1%	15%	135
Texas	5.8%	8%	628
Utah	64.1%	65%	46
Vermont	23.4%	22%	25
Washington	45.4%	46%	139
West Virginia	39.5%	39%	55
Wisconsin	40.6%	34%	120
Wyoming	27.6%	16%	25

Red: gap higher across OZs than across state

Blue: gap higher across state than across OZs



Disaggregating the Data: Socioeconomic Characteristics

Investigated whether a range of socioeconomic characteristics were associated with changes in the size of the child care gap

Compared the statewide gap to the gap in block groups...

- With a high percent of minority residents
- Where the median household income is below 85% of the state median
- Where the median household income is above 85% of the state median
- Where a high percent of residents live below the federal poverty line

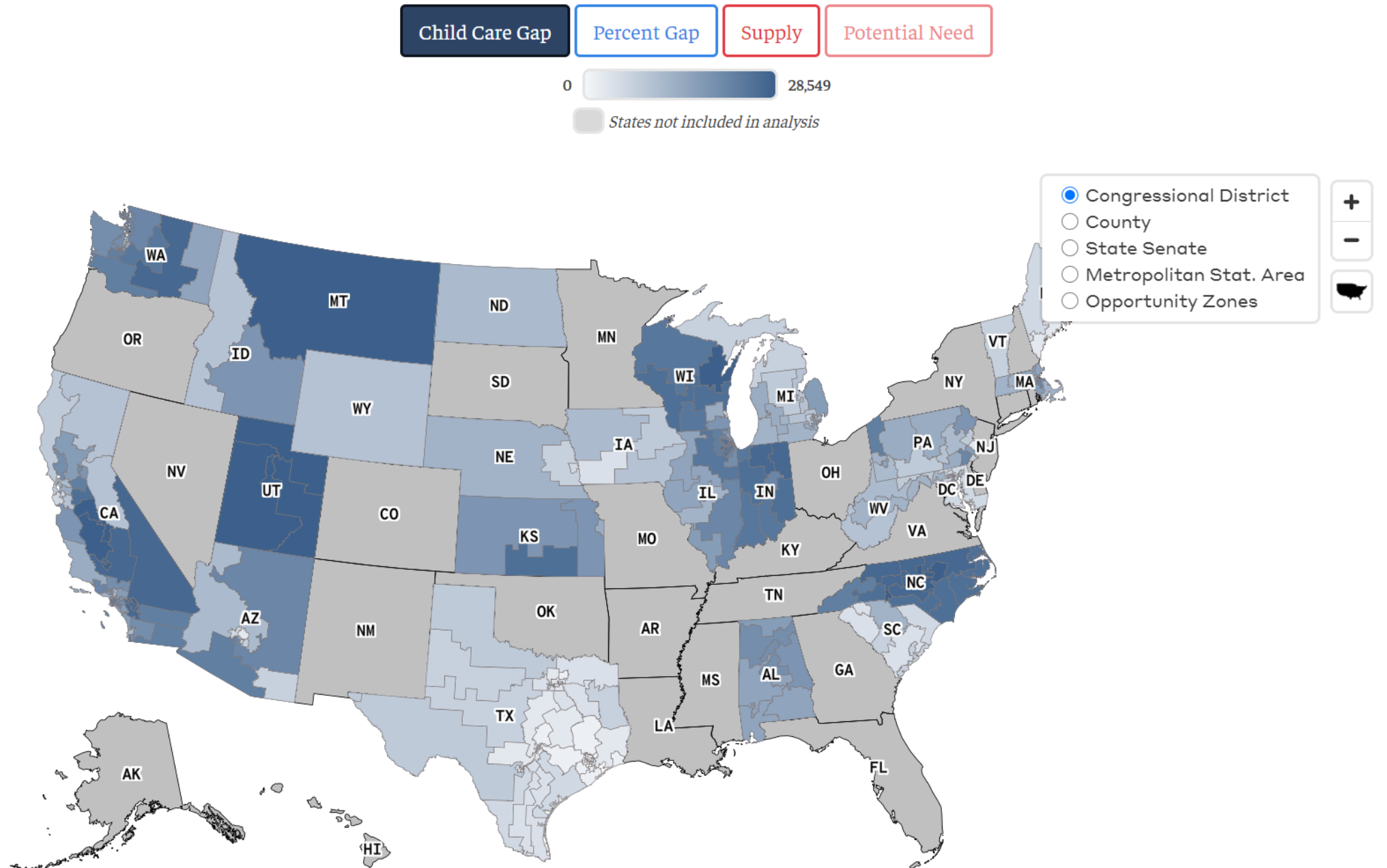
Socioeconomic trends are different in every state and must be closely reviewed using the interactive map

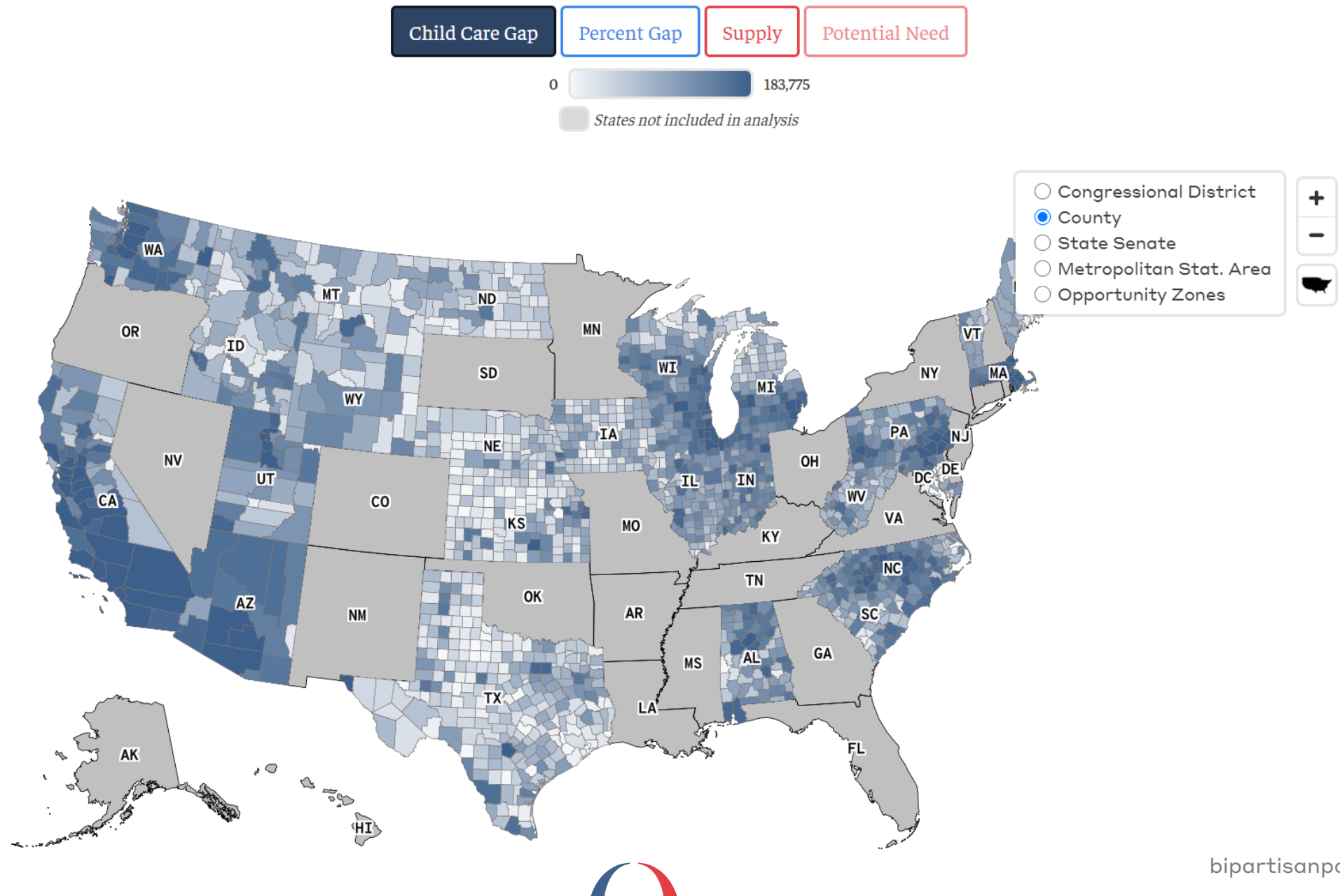


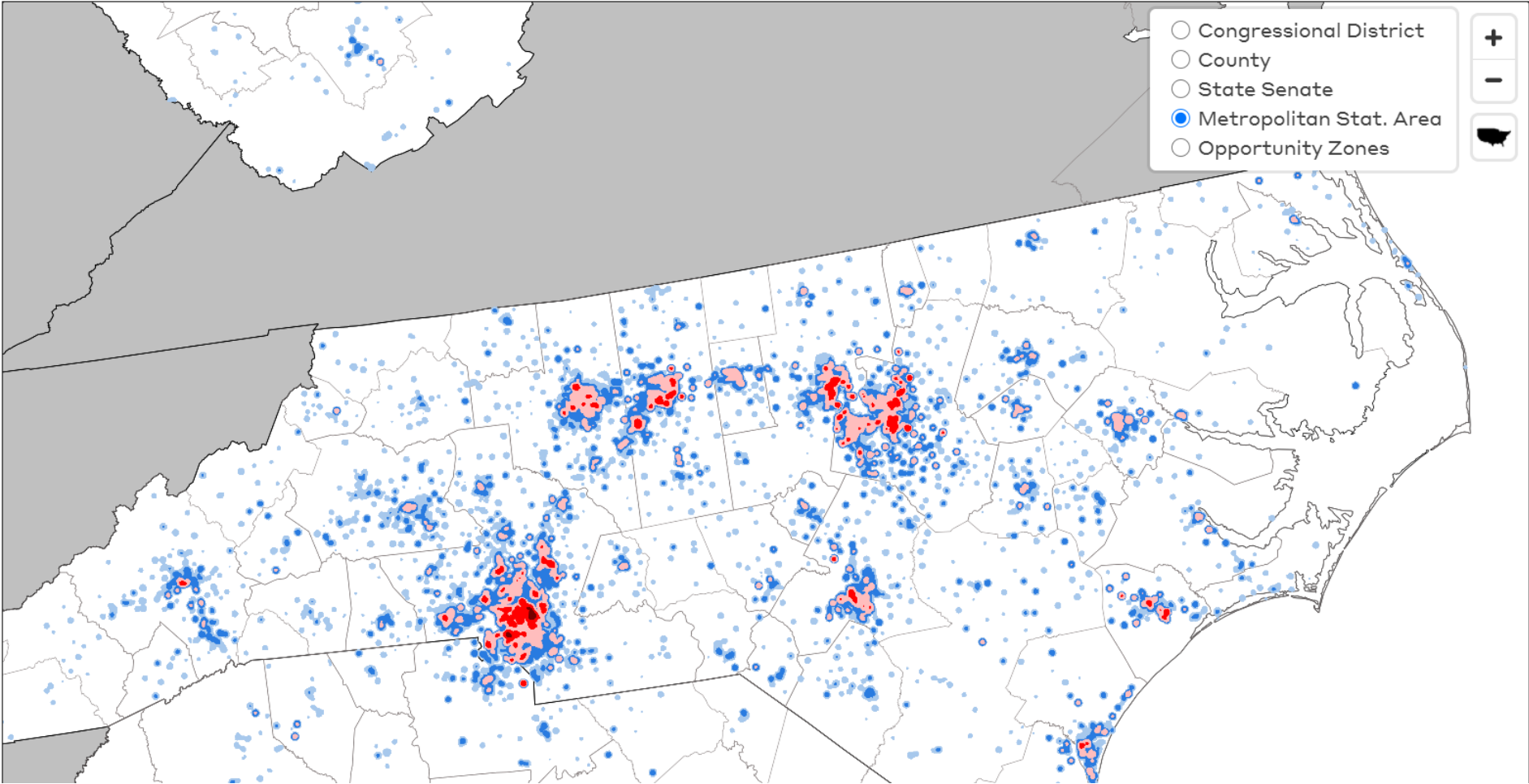
Childcaregap.org

The Interactive Map









Child Care Gap

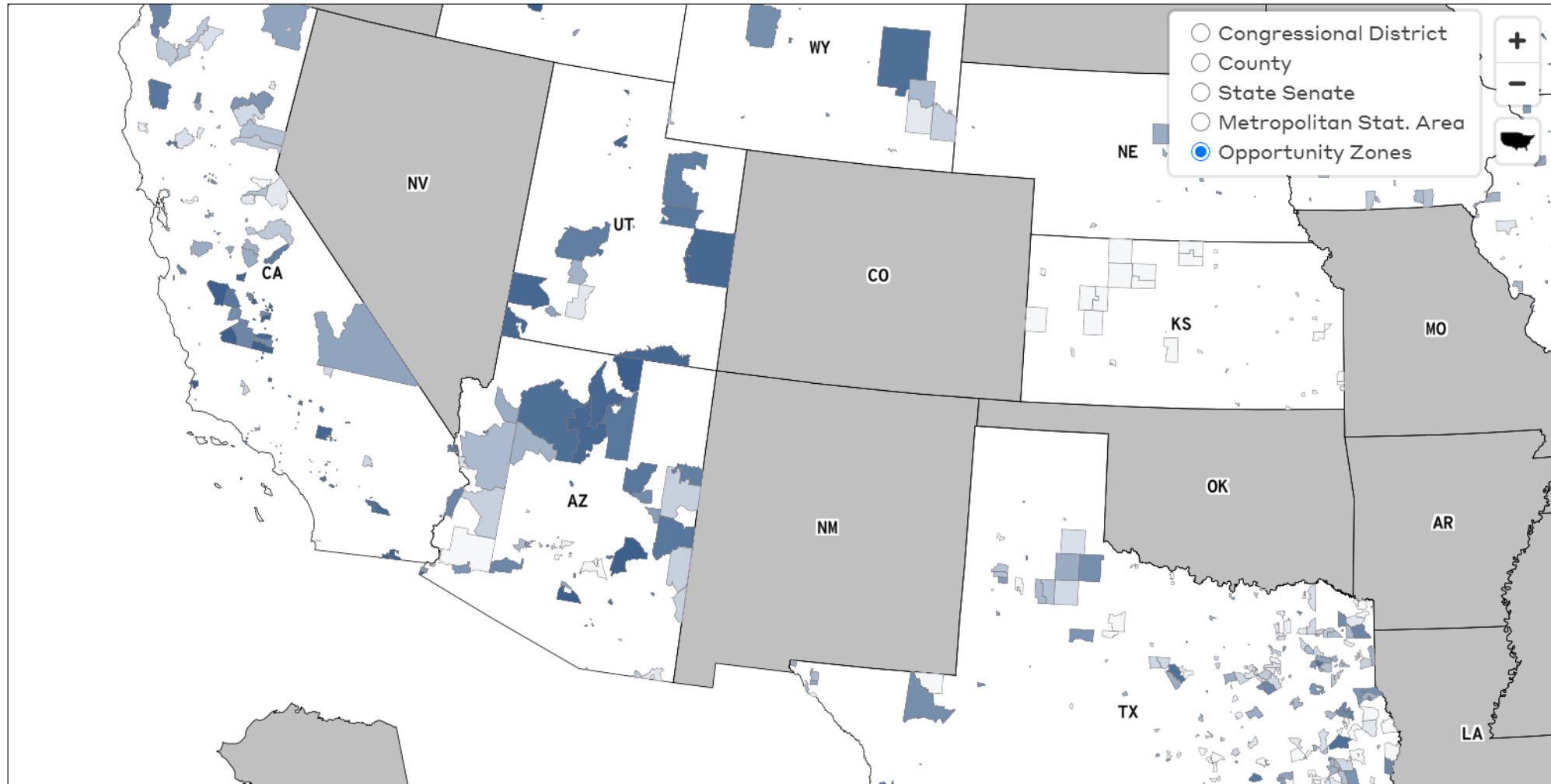
Percent Gap

Supply

Potential Need

0 799

States not included in analysis



Select a state:

Maine

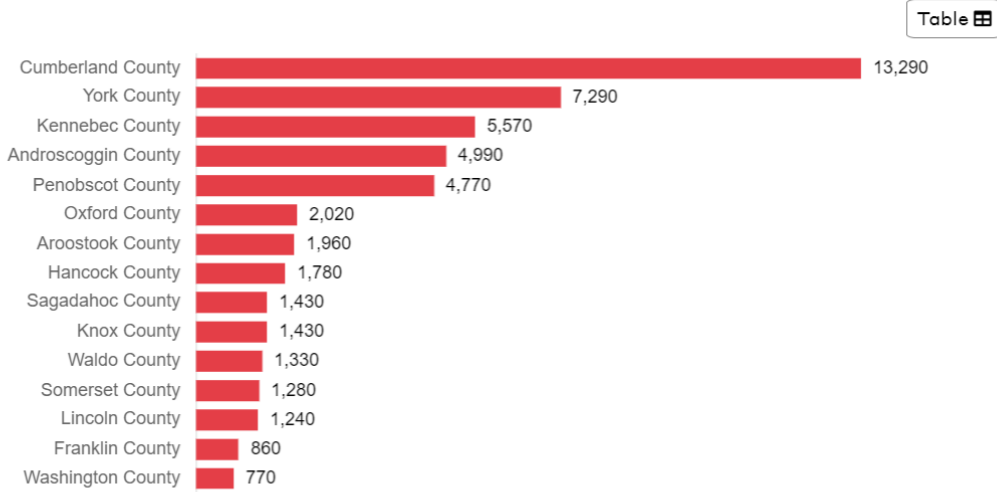
✕

Supply

Supply is the number of child care slots offered by legally operated and state-recognized providers. BPC used this definition to ensure the analysis included the entire range of formal child care settings parents utilize. To build comprehensive datasets of each provider’s location and capacity, BPC worked directly with each state’s various child care and education agencies, as well as federal child care administrations. Each state’s child care supply data was only incorporated into the analysis once the state approved of the dataset. To continuously improve the analysis, the supply data is subject to change as BPC encourages states to continuously include additional facilities information that could make the dataset more complete. See the full report for a detailed explanation of the data collection process.

Facility Type	Count	Capacity
Child Care Subsidy Program License Exempt Resource	308	550
Child Care Facility	684	34,660
Family Child Care Provider	927	10,020
Public Pre-K	86	2,260
Head Start	117	2,710
Department of Defense	1	140

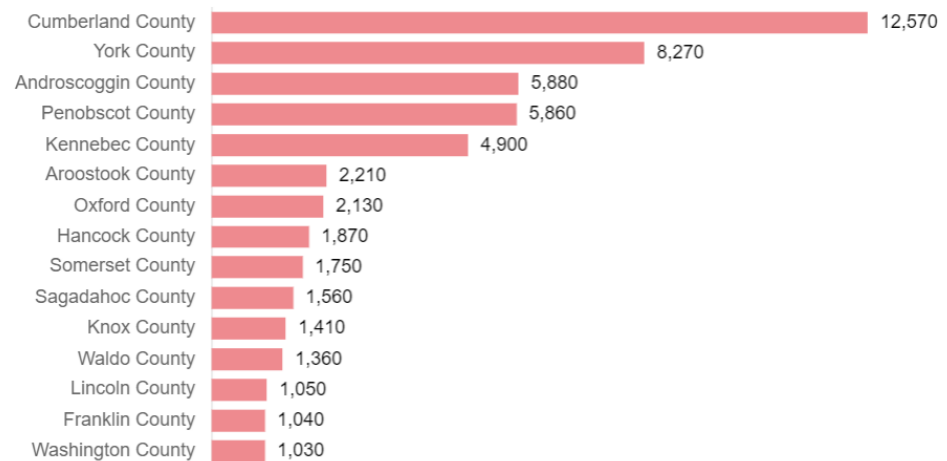
Sources: State of Maine, Office of Head Start, Department of Defense



Potential Need

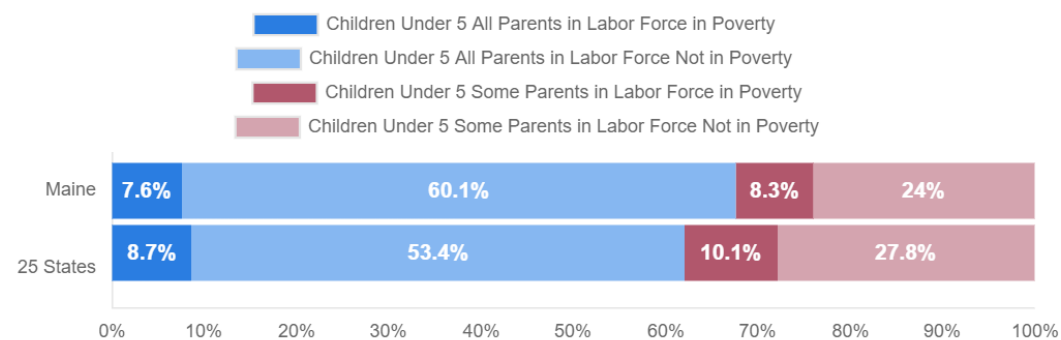
The number of children age five and under with all available parents in the labor force, according to the 2014-2018 American Community Survey five-year sample. BPC did not analyze the demand for child care: the rate at which families actually utilize or look for formal child care. While child care demand would have produced a better estimate of the amount of additional supply parents actually need, many seasonal and family-related factors influence demand and there is little data available on the demand for child care by geographic area. As a result, gap estimates from this analysis provide informative starting points from which officials can begin to make policy recommendations. But any recommendations must also consider data on how much and what types of child care communities will actually use.

Some communities place great value on caring for children within their families, rather than opting for formal child care. In these communities, potential need may be less likely to translate to actual demand. To identify the states in which potential need may have been more affected by greater



Source: U.S. Census Bureau, 2014-2018 American Community Survey (ACS) 5-Year Estimates

Some communities place great value on caring for children within their families, rather than opting for formal child care. In these communities, potential need may be less likely to translate to actual demand. To identify the states in which potential need may have been more affected by greater preferences for family caregiving, look to the chart below for each state's composition of children age five and under by parent labor force participation. Having a greater proportion of children with some parents not in the labor force compared to the national average, may indicate a greater emphasis on family caregiving. The figure also disaggregates by poverty categorization since poverty status likely constrains parents' choices of whether to participate in the labor force or stay home.



Source: U.S. Census Bureau, 2014-2018 American Community Survey (ACS) 5-Year Public Use Micro Sample

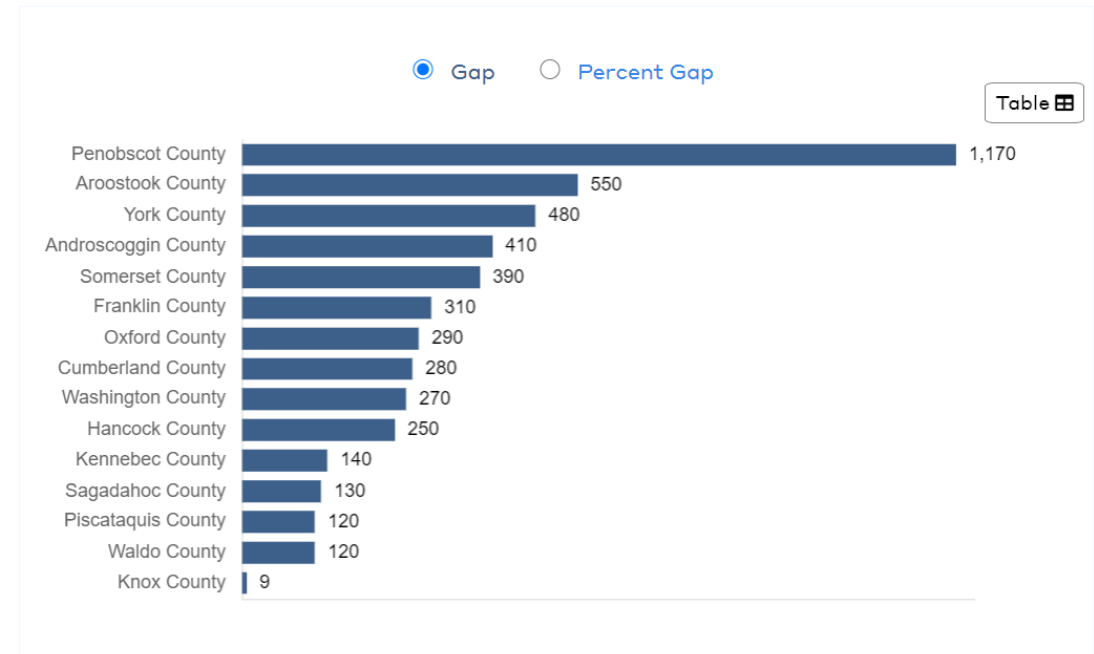
Franklin County	1,070
Washington County	1,030

Source: U.S. Census Bureau, 2014-2018 American Community Survey (ACS) 5-Year Estimates



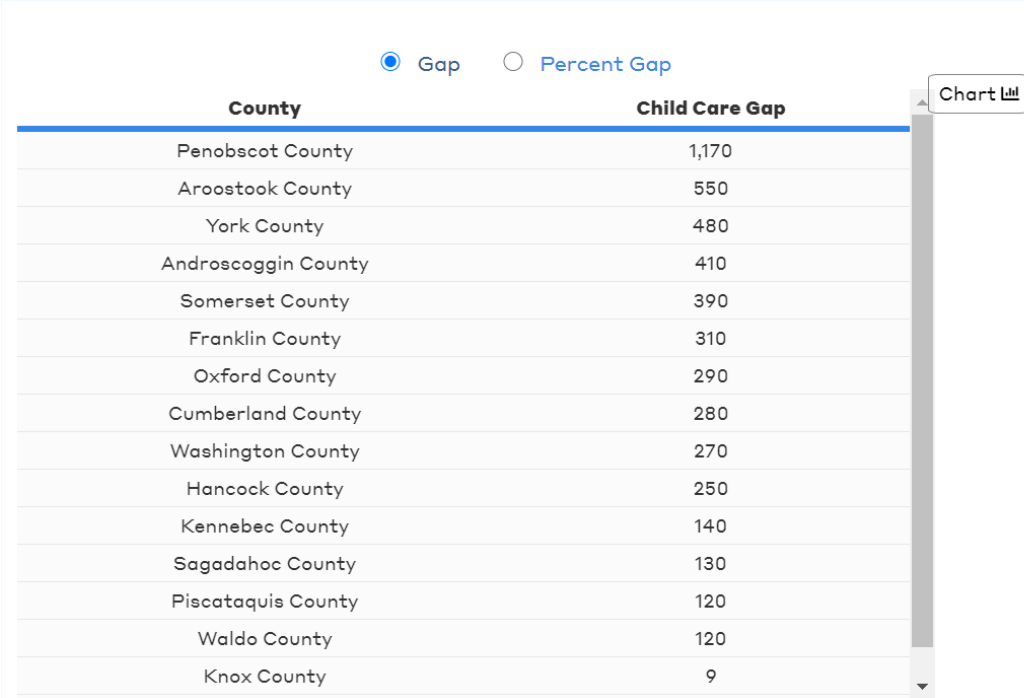
Child Care Gap

The number of children who potentially need care but whose families cannot reasonably access formal care by driving. Each census block group—the census’s best available household location estimate—was assigned a service area of a specific driving radius. It was assumed that families with children five and under in a given block group could reasonably access the child care facilities within their service area. Thus, potential child care need within each block group was proportionally allocated to the child care providers within each service area until all provider capacity was filled. Urban block groups were assigned service areas with a 3.5-mile driving radius, while rural block groups were assigned service areas with a 10-mile radius to reflect the distances parents in those communities are willing to drive. This methodology enabled BPC to quantify the number of children without access to child care by location. See the report for a detailed explanation of the methodological decisions made in this analysis.



Child Care Gap

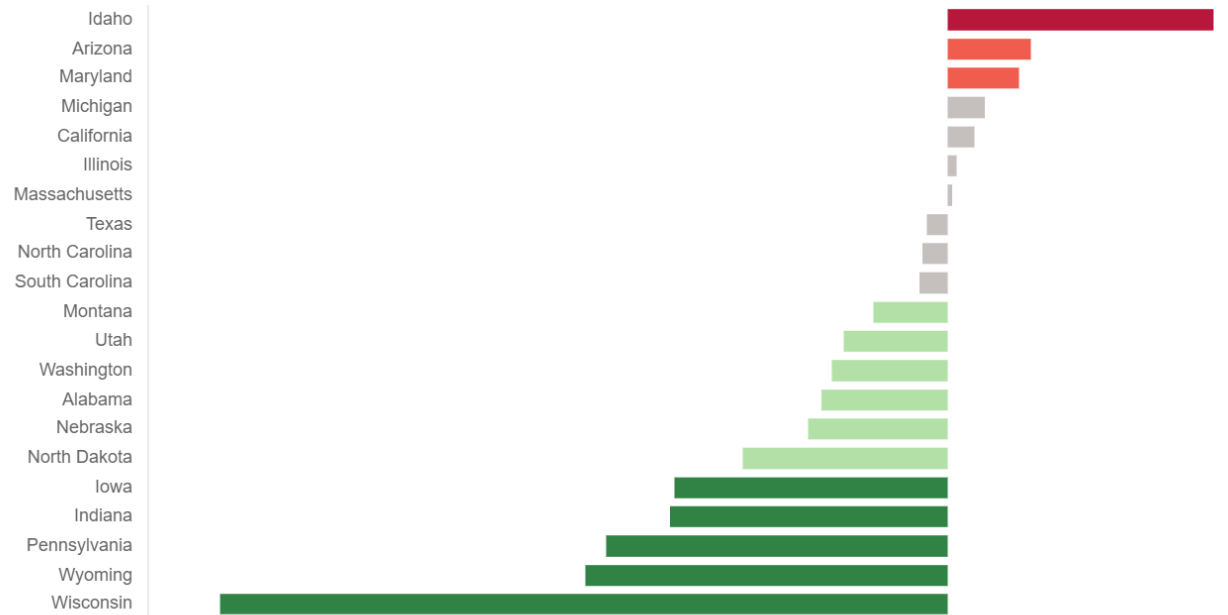
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<div><input checked="" type="radio"/> Gap <input type="radio"/> Percent Gap</div>	
County	Child Care Gap
Penobscot County	1,170
Aroostook County	550
York County	480
Androscoggin County	410
Somerset County	390
Franklin County	310
Oxford County	290
Cumberland County	280
Washington County	270
Hancock County	250
Kennebec County	140
Sagadahoc County	130
Piscataquis County	120
Waldo County	120
Knox County	9

Disaggregating the Gap: Socioeconomic Characteristics

Statistic: Is Minority (>25%)



BPC investigated whether a range of socioeconomic characteristics were associated with changes in the size of the gap. Because household level data was not available, block groups across each state were categorized into buckets based on whether a certain proportion of their population (percentages above) aligned with a certain socioeconomic characteristic. Then BPC calculated the total percent gap across the block groups in each of these categories and compared the percent gap to the statewide percent gap.

Select Socioeconomic Characteristic

- ☒ Is Minority (>25%)
- ☐ Under 85% Median Income (>50%)
- ☐ Over 85% Median Income (>50%)
- ☐ Below Poverty (>25%)
- ☐ Below 200% of Poverty (>25%)

Gap % Relative to Rest of State

- Higher than Statewide Average
- Marginally Higher than Statewide Average
- About Equal to the Statewide Average
- Marginally Lower than Statewide Average



Data Collection Challenges and Recommendations

Issue: Capacity by Age

- Recommendation: point-in-time count of capacity and enrollment by non-overlapping ages

Issue: Licensed Capacity vs Desired Capacity vs Enrollment

- Recommendation: point-in-time count of desired capacity (especially during pandemic)

Issue: Multiple Databases

- Recommendation: make data publicly available and develop forums to align data efforts

Issue: Tribal Child Care

- Recommendation: work with tribal leaders to collect tribal capacity and need data

As states rethink their data collection systems in response to COVID-19, this report offers guidance for effective changes



 Bipartisan Policy Center

Panel Discussion with State Administrators

Tracy Gruber

Director, Utah Office of Child Care

Dr. Todd A. Landry

Director, Maine Office of Child and Family Services

Beth Oppenheimer

Executive Director, Idaho AEYC

