



North Carolina

THE SUPPLY OF, POTENTIAL NEED FOR, AND GAPS IN CHILD CARE IN NORTH CAROLINA IN 2019

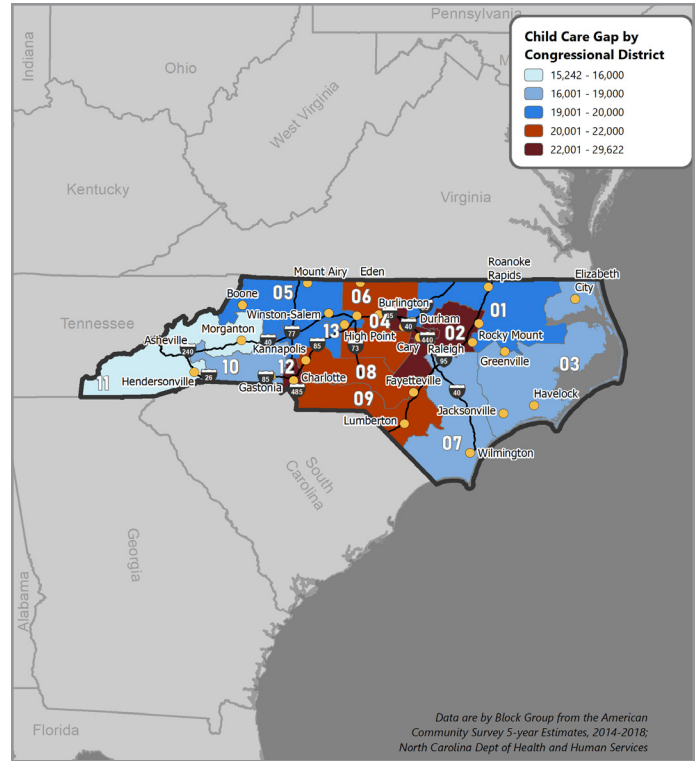
In recent years, there has been increasing bipartisan support at all levels of government to ensure working parents have access to high-quality, affordable child care. But amid these efforts, an important underlying question has yet to be answered: **how much additional child care does the country need?**

Without a clear understanding of the actual supply versus the need for care—the child care gap—it is impossible to quantify either the actual child care spaces needed or the corresponding costs associated with closing that gap. Without this information, America is unable to develop a plan to ensure that all families have access to affordable, reliable, and quality care for their children.

Incorporating the most comprehensive child care supply data collected from **North Carolina** to date, and an advanced methodology incorporating parent choice, this analysis provides a long overdue starting point from which the country can understand how much child care is needed. With such data, policymakers can produce evidence-based strategies to improve the supply of child care in a manner that reflects the quantity and type of child care communities actually need.

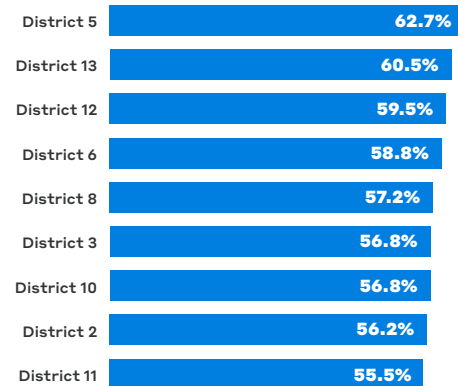
UNDERSTANDING PARENT CHOICE

As policymakers review this data and consider how and where to address child care gaps in their communities, it is especially important to consider parent choices and preferences. While this data can be used to calculate the amount of child care needed, the *potential need* for child care should not be construed with the *actual demand* for care. These findings offer a starting point from which **North Carolina** can work to close its child care gaps, but more work needs to be done to both understand parent preferences and incorporate them into policy decisions at the federal, state, and local levels.



- Supply** Number of slots offered by legally operated and state-recognized providers
- Potential Need** Number of children aged birth through five with all available parents in the labor force
- Gap** Number of children who potentially need care but whose families cannot reasonably access formal child care

Percent Gap by Congressional District



NORTH CAROLINA

North Carolina Child Care Gap Findings

| | |
|-----------------------------|------------------|
| Potential Need ¹ | 459,530 children |
| Supply ² | 193,990 slots |
| Gap | 261,830 children |
| Percent Gap | 57% of children |

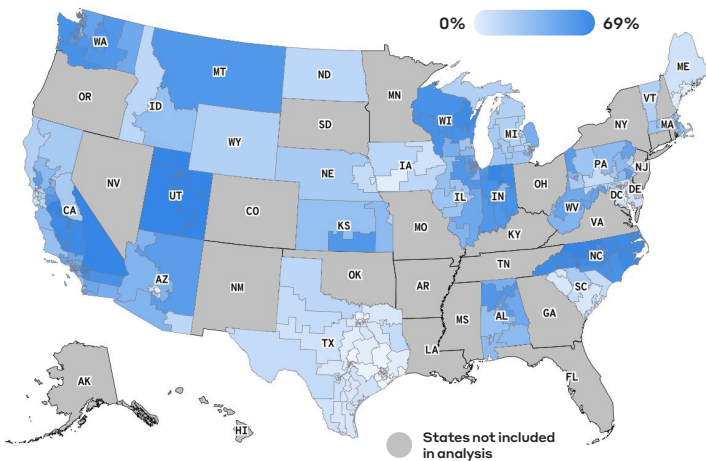
Child Care Supply Across North Carolina

| Facility Type | Count | Capacity |
|--------------------------------------|-------|----------|
| Center | 3,859 | 182,950 |
| Family CC Home | 1,319 | 6,230 |
| Additional from Office of Head Start | 22 | 1,080 |
| Department of Defense | 4 | 3,730 |

NATIONAL COMPARISONS

BPC performed a child care gap analysis in 25 states. **North Carolina's** statewide gap of **57.0%** is **higher** than the 25-state average. Rural communities in **North Carolina** are **less underserved** than urban communities—**inconsistent** with trends across the 25-states.

Percent Gap by District

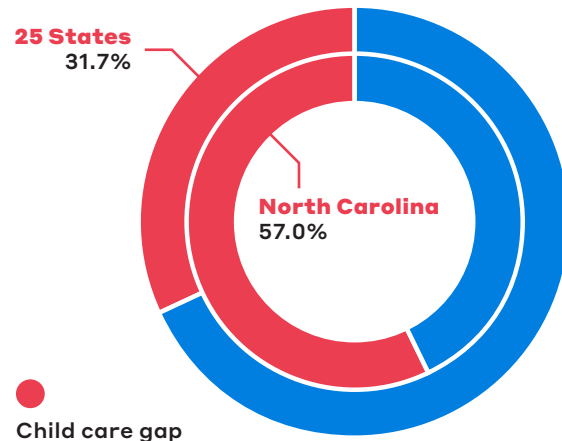


8,449,000 children
have the potential need for child care.

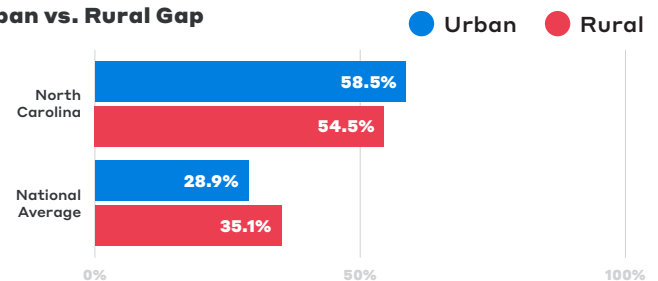
There is a supply
of **5,901,320**
child care slots.

Child care gap:
31.7% of the
potential need.

North Carolina vs. National Percent Gap



Urban vs. Rural Gap



See the full report for additional data, the methodology, a discussion about how to properly interpret these findings, and to view an interactive map detailing child care access data by a number of other geographies.

<https://childcaregap.org/>

<https://bipartisanpolicy.org/early-childhood/>

<https://bipartisanpolicy.org/blog/parent-survey-resource-center/>

1 U.S. Census Bureau. 2014-2018 American Community Survey 5-year Public Use Microdata Samples. December 17, 2019. Available at: <https://www.census.gov/programs-surveys/acs/microdata/access.html>

2 BPC worked directly with state child care and education agencies to build comprehensive datasets of each provider's location and capacity, as well as the federal Department of Health and Human Services and Department of Defense to incorporate Head Start and military child care data.