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.
North Carolina Child Care Gap Findings

<table>
<thead>
<tr>
<th>Facility Type</th>
<th>Count</th>
<th>Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Center</td>
<td>3,859</td>
<td>182,950</td>
</tr>
<tr>
<td>Family CC Home</td>
<td>1,319</td>
<td>6,230</td>
</tr>
<tr>
<td>Additional from Office of Head Start</td>
<td>22</td>
<td>1,080</td>
</tr>
<tr>
<td>Department of Defense</td>
<td>4</td>
<td>3,730</td>
</tr>
</tbody>
</table>

North Carolina vs. National Percent Gap

- **North Carolina**: 57.0%
- **National Average**: 31.7%

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—consistent with trends across the 25-states.

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—consistent with trends across the 25-states.

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.