



Catalyzing Growth:

# Using Data to Change Child Care

The Year in Child Care: 2021 Data, Analysis and Recommendations



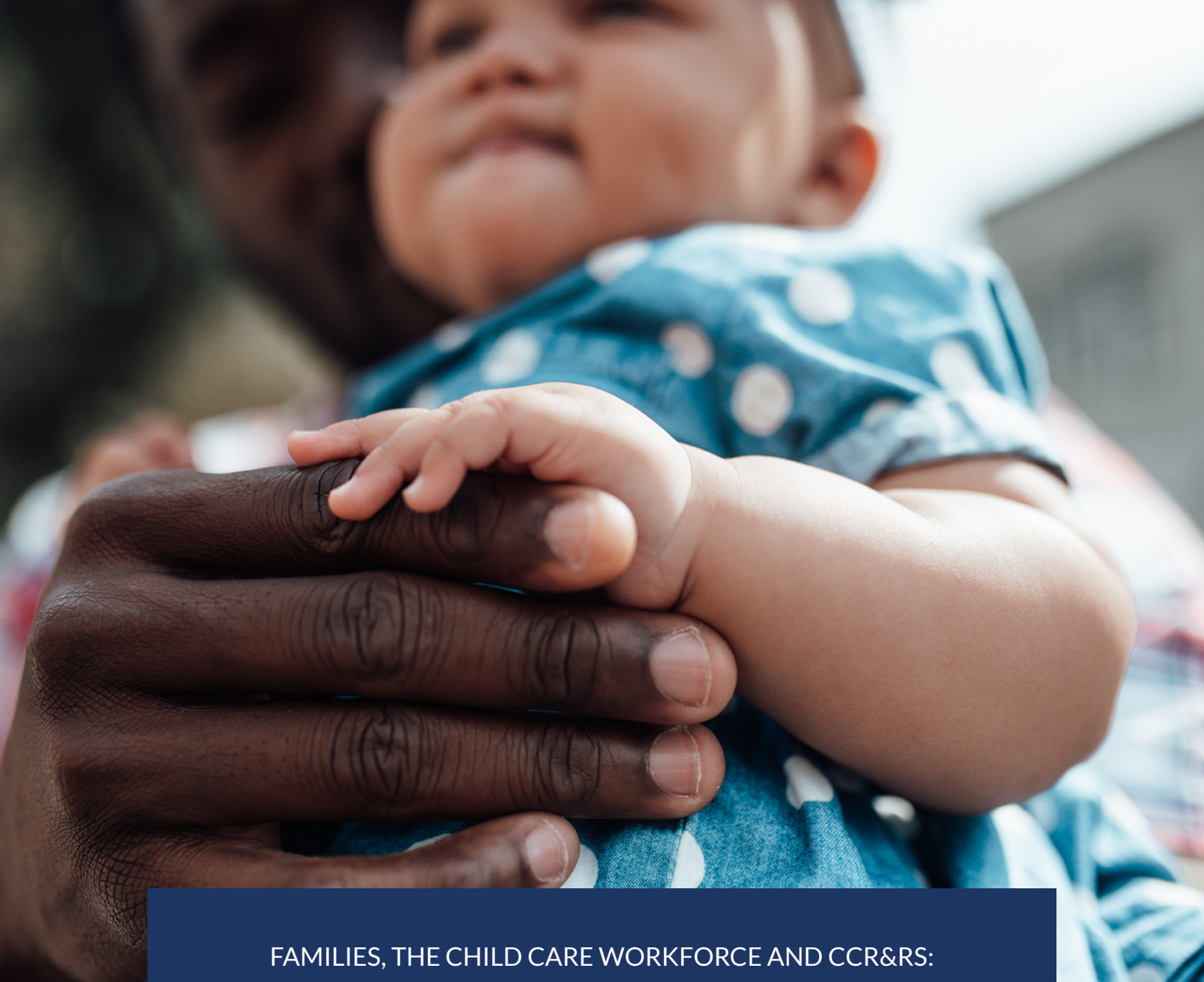


The *Year in Child Care: 2021 Data, Analysis and Recommendations* is the final report of Child Care Aware® of America (CCAoA)'s *Catalyzing Growth: Using Data to Change Child Care* series. Together with the earlier reports, *2021 Child Care Landscape Analysis* and *2021 Child Care Affordability Analysis*, this report presents a comprehensive look at the child care system's recent challenges and opportunities.

In *The Year in Child Care: 2021 Data, Analysis and Recommendations*, we aim to:

- Understand how different groups of stakeholders (families, the child care workforce and Child Care Resource and Referral agencies (CCR&Rs)) have coped with child care challenges throughout the COVID-19 pandemic.
- Give readers a fuller picture of child care affordability by comparing child care prices to median household income by marital status and race/ethnicity.
- Show how child care supply does not match with potential demand through an analysis of licensed capacity.

Throughout these three sections, we will also highlight child care-related findings from other researchers over the past year. These findings will help readers better understand the current state of child care and be better equipped to push for changes to our child care system. Child care is an issue that affects the entire U.S. economy.<sup>1</sup> When families have access to affordable, high-quality child care, we grow a stronger economy.



FAMILIES, THE CHILD CARE WORKFORCE AND CCR&RS:

# Struggles and Innovations

Since early 2020, families with young children and child care providers have faced unprecedented challenges. The health, safety and financial challenges of the past few years have caused [stress, anxiety and uncertainty](#).<sup>2</sup> Families with young children, [particularly mothers](#),<sup>3</sup> have struggled to balance work demands with child care challenges such as program closures and wait lists. Meanwhile, many [child care providers have struggled](#)<sup>4</sup> to maintain their financial security and adequate staffing for their programs.

## Families with Children

Raising children [continues to be costly](#).<sup>5</sup> A survey conducted by the [Kaiser Family Foundation](#)<sup>6</sup> in summer 2022 found that 49% of families with children in the household reported difficulty in paying the usual household expenses. Several studies have found that race and ethnicity play a role in the level of financial stress that families are experiencing, with [families of color being more likely to report material hardships](#).<sup>7</sup> Black, Native American and Hispanic/Latino families were more likely to report having [serious financial problems due to recent inflation](#)<sup>8</sup> when compared to White families.

**49%** of families with children in the household reported difficulty in paying the usual household expenses.<sup>6</sup>

Child care disruptions have also become a reality for families. According to data from the [U.S. Census Bureau's Household Pulse Survey](#),<sup>9</sup> in April and May 2022, 19% of families who use child care reported that in the past four weeks they were unable to send their children to their regular child care setting due to provider unavailability, safety concerns or the inability to afford care.<sup>10</sup> This represents over 3.9 million families. Among the [RAPID Survey](#)<sup>11</sup> sample, the percentage of families who experienced child care disruptions increased from 23% in December 2021 to 44% in January 2022. [These disruptions](#)<sup>12</sup> can affect parents' ability to work and increase their emotional distress. Furthermore, these disruptions can lead to poor behavioral health outcomes for children.<sup>13</sup>

*Acknowledgement: In this report, we use the term Hispanic/Latino to describe families with a Latin American or Spanish background. We realize that there are other terms that describe these populations such as Latinx or Latine that are gender inclusive, however, we chose this term because it best matches how data were collected.*

## Child Care Workforce\*

The child care workforce has declined substantially since 2020. Analysis of July 2022 employment numbers from the Bureau of Labor Statistics by the [Center for American Progress](#) shows that the child care workforce remains 8.4% below the number employed in February 2020. Prior to the pandemic, center-based teachers were [paid less than half](#)<sup>15</sup> of what kindergarten teachers earned. Financial stresses caused by the pandemic resulted in [33% of child care providers](#)<sup>16</sup> experiencing material hardships related to food, housing or utilities. A study in California found that family child care (FCC) providers were more likely to report financial hardships when compared to center directors. These hardships included being unable to pay themselves, taking on a second mortgage and taking on increased credit card debt.<sup>17</sup>

*\* For the purposes of this report, child care workforce refers to those who provide direct care to children as well as child care program directors.*



## Physical and emotional well-being are additional factors that have been historically neglected in the child care workforce.

One study found that 60% of child care teachers in the sample experienced ergonomic pain and over 50% reported regular headaches.<sup>18</sup> A sample of Black and Hispanic/Latino child care providers in New York City reported lower quality of life and high stress levels throughout the COVID-19 pandemic.<sup>19</sup> Large numbers of the workforce [have exited the profession](#) due, in part, to feelings of being unsupported and neglected.<sup>20</sup>

Throughout these challenges, the federal government has passed several bills to provide aid to the child care sector. The most well-known funding bill is the American Rescue Plan Act (ARPA), passed in March 2021, which provided \$24 billion for child care stabilization grants. States are in the process of distributing this temporary funding to child care programs and some preliminary data are available. [According to the Administration for Children and Families \(ACF\)](#),<sup>21</sup> center-based programs have received an average of \$110,000 under ARPA stabilization grant funding, with much of the money going toward paying staff. FCC providers received an average of \$20,000, commonly used to pay overhead costs such as rent, mortgage payments and utilities. As of October 2022, ARPA funds have helped more than [200,000 child care programs](#)<sup>22</sup> remain in business. For more information about how states are helping child care providers through ARPA funding, check out [CCAoA's implementation tracker](#)<sup>23</sup> and [other related resources](#).<sup>24</sup>

### CCR&Rs

CCR&Rs have worked diligently throughout the COVID-19 pandemic to help families and child care providers. Two of the primary services CCR&Rs provide are child care referrals and consumer education. According to data that [CCAoA collected in 2018](#),<sup>25</sup> 96% of CCR&Rs helped families find child care, while 80% connected families with local social service programs. A recent report by [U.S. Digital Response](#)<sup>26</sup> found that CCR&Rs serve as a crucial intermediary between the government agencies that administer child care assistance programs and families who need assistance.

CCR&Rs also support child care providers in a variety of ways. Early in the COVID-19 pandemic, CCAoA conducted a survey of CCR&Rs to ask about the ways in which they were helping their communities during this time of crisis. [Over half of CCR&Rs](#)<sup>27</sup> reported that they were helping child care providers locate and purchase personal protective equipment (PPE) and nearly 60% were assisting child care programs with plans on how to safely reopen their businesses.



**96%** of CCR&Rs helped families find child care.

**80%** of CCR&Rs connected families with local social service programs.

\*Based on CCAoA's 2018 survey of CCR&Rs.

## Analysis:

### What Challenges Have Families and the Child Care Workforce Faced Since 2020?

Since the beginning of the COVID-19 pandemic, there have been multiple efforts to survey families with children and child care providers to find out how they have coped during this time. One of the most comprehensive [survey projects](#) is [RAPID](#), which was first administered by the University of Oregon and now by Stanford University. Since April 2020, the RAPID Survey has asked families with children under age 6 about their daily experiences. Families are surveyed monthly on topics such as financial stressors, emotional well-being, child behaviors and child care challenges. In March 2021, a new RAPID Survey tool was launched to ask child care providers about their experiences amid the ongoing COVID-19 pandemic. A sample of child care providers is surveyed monthly on their current financial and emotional well-being, along with other questions about the challenges they are facing. The RAPID Survey team at Stanford University generously provided data as of September 30, 2022, for both the family and child care provider surveys. We analyzed this dataset to answer the following research questions:

- What are families' child care needs and experiences?
- Has the pandemic exacerbated family concerns around access to child care, child care cost or other issues related to the care of their children?
- What are the needs and experiences of child care providers?
- Has the pandemic exacerbated provider shortages, stress or issues related to compensation?

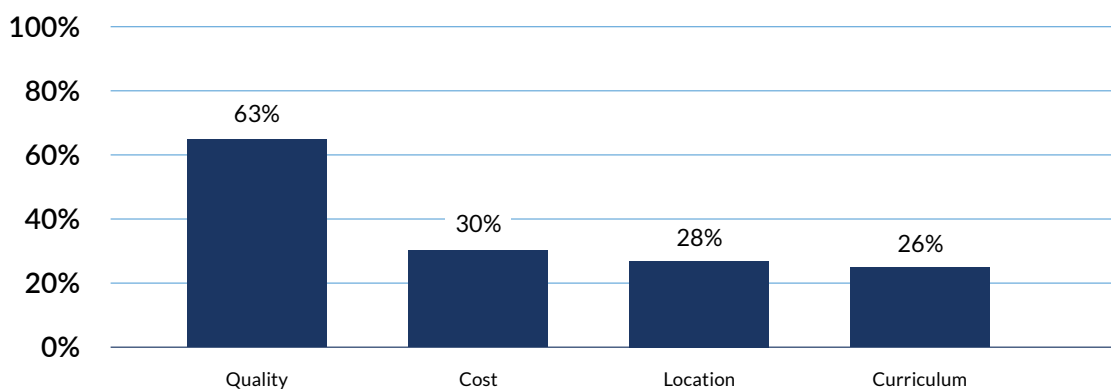


Both before the pandemic and now, parents want high-quality providers that they can afford. Trust, health and safety standards and curriculum are other factors that parents consider when looking for child care.

When asked to rank the reasons that they selected their pre-pandemic child care arrangements, parents of young children who responded to the RAPID Survey identified quality, cost, location and curriculum (Figure 1). The survey also asked parents what they would have improved in their pre-pandemic child care arrangements. Cost, quality, safety/cleanliness and curriculum were the elements that received the top rankings (Figure 2).

**FIGURE 1:**

### Most Important Reasons Parents Selected Pre-Pandemic Child Care Arrangements

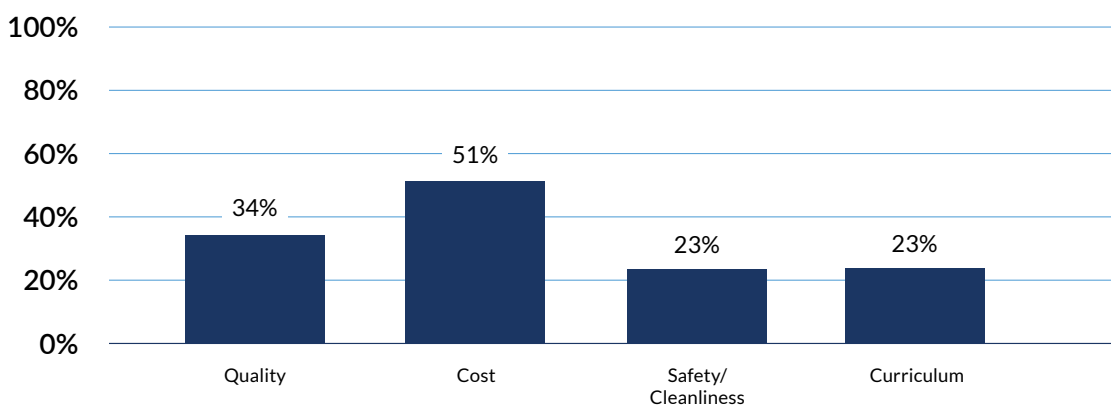


Source: Authors' analysis of RAPID Survey data collected in June 2020.

Note: N = 384. Bars represent the percentage of parents who ranked each element as their #1 or #2 reason for selecting child care.

**FIGURE 2:**

### What Parents Would Improve, Pre-Pandemic Child Care Arrangements

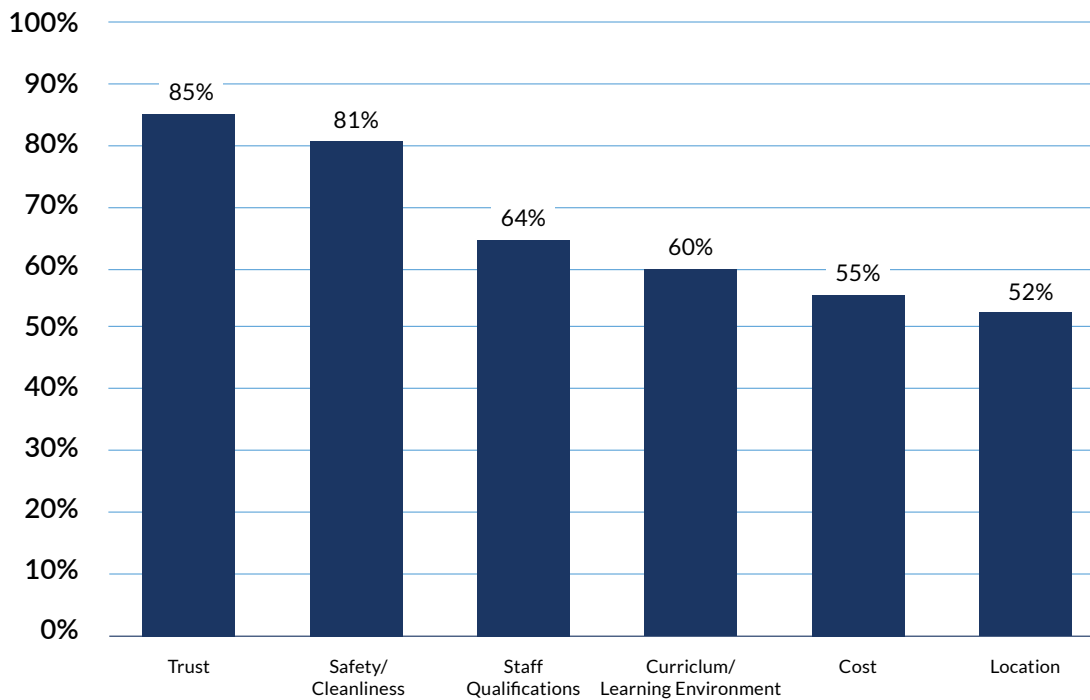


Source: Authors' analysis of RAPID Survey data collected in June 2020.

Note: N = 370. Bars represent the percentage of parents who ranked each element as their #1 or #2 child care program characteristic they would improve.

As the pandemic progressed, parents were asked to rate how important various factors were to them when considering child care arrangements. Figure 3 shows that trust, safety/cleanliness, curriculum/learning environment and staff qualifications received the most ratings of “very important.” Over 50% of parents also listed cost and location as very important factors.

**FIGURE 3:**  
Child Care Factors Rated as ‘Very Important’ by Parents



Source: Authors' analysis of RAPID Survey data collected in September 2022.

Note: N = 148. Bars represent the percentage of parents who ranked each element as a “very important” child care program characteristic.



Over half of parents of young children are using child care, but many are struggling to find spaces for their children and have difficulty paying for child care.

The RAPID Survey also asked parents about their current child care arrangements. In the September 2022 administration of RAPID, over half of respondents reported that they have used child care in the month prior to completing the survey (55%). The average number of hours their children spent each week in child care varied by setting. Parents who used center-based care used it an average of 35 hours per week, while those who used family child care homes reported an average use of 40 hours per week. Those who used family, friend and neighbor care (both paid and unpaid) reported that they use it for an average of 16 hours per week.

Child care has been a source of stress for parents who took the RAPID Survey. In the September 2022 administration of RAPID, more than 75% of parents reported that they have had difficulty finding a child care space, and 70% stated that this difficulty has impacted their ability to work. Meanwhile, nearly 30% of parents experienced moderate to extreme levels of stress due to difficulty paying for child care. These results should be interpreted with caution, however, due to a low sample size during this survey administration window ( $N = 30$ ).

Overall, parents who participated in the RAPID Survey are looking for the same qualities in a child care arrangement now that they were seeking before the pandemic. The pandemic seems to have reduced the supply of child care even more than pre-pandemic losses, most likely leading to increased difficulty for parents finding child care, which could be impacting their ability to work. According to data from the RAPID Survey of child care providers, rising prices are impacting them as well.

**“Our (first) daughter was in preschool and I was starting to work again when our second daughter came. I am now trying to figure out how to pay bills or work from home while caring for her since we cannot afford (child care) anymore at all.”**

— Parent from Washington



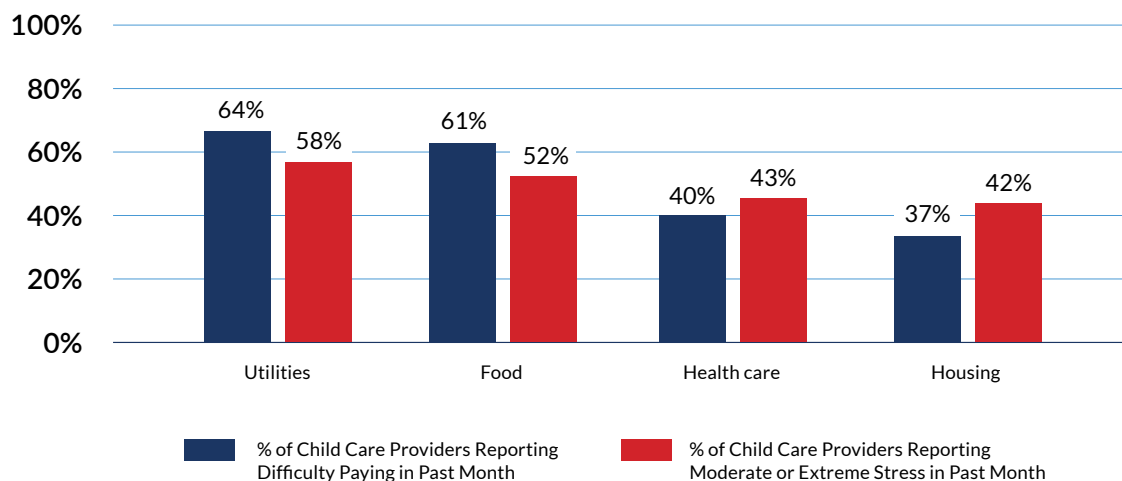
Over half of child care providers report feeling stressed about paying for food and utilities.

The RAPID Survey asked child care providers a series of questions about financial stress. Figure 4 shows that food and utilities were the two expenses that child care providers struggled the most to pay for in the month prior to completing the survey. Similarly, over 50% of child care providers felt moderate or extreme stress when paying for utilities and food in the month prior to completing the survey.

**“We need help. You can make more working at a fast food place (than) at a preschool. We are not babysitters, we provide for the child(’s) social and emotional well being. We are (preparing) them for the future and they will be our future leaders.”**

– Child Care Provider from California

**FIGURE 4:**  
Expenses That Child Care Providers are Having Difficulty Paying



Source: Authors' analysis of RAPID Survey data collected in June 2022.  
N = 135.

When asked to choose all the ways in which they planned to pay for expenses in the next month, 36% of respondents reported that they planned to use credit cards and pay off the balance over time. As seen in Table 1, 20% planned to borrow money from family or friends and 19% planned to sell something.

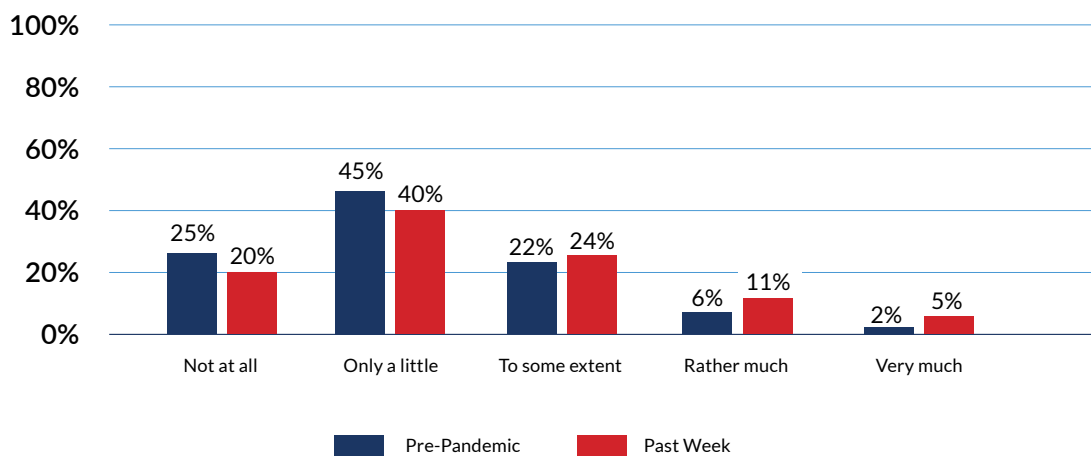
**TABLE 1:****How Child Care Providers Plan to Pay Expenses in the Next Month**

Method	% of Child Care Providers
Use a credit card and pay off the balance over time	36%
Borrowing from a family member or friend	20%
Selling something	19%
Using a bank loan or a line of credit	11%
Asking landlord or mortgage provider for an extension	9%

Source: Authors' analysis of RAPID Survey data collected in March 2022.  
N = 701.

Stress levels now are higher among child care providers compared to pre-pandemic stress levels.

The RAPID Survey asked respondents to rate their overall stress level pre-pandemic during the baseline survey in April 2021 and rate their stress level in the week prior to the survey in June 2022. As seen in Figure 5, the percentage of providers who felt “rather much” and “very much” stressed rose from pre-pandemic levels, while those who reported little or no stress dropped.

**FIGURE 5:****Amount of Stress Felt by Child Care Providers Pre-Pandemic and During Past Week**

Source: Authors' analysis of RAPID Survey data from April 2021 and June 2022.  
N = 2,234 in April 2021 and 365 in June 2022

Many providers surveyed have concerns about the ongoing child care staffing crisis.

The RAPID Survey asked a series of questions about the ongoing child care staffing crisis and how it was affecting providers' well-being. According to data collected in May 2022, 34% reported that their programs experienced staffing shortages prior to COVID-19, and 61% reported that their programs were currently experiencing shortages. As seen in Table 2, these shortages have led to many child care providers feeling more stressed, anxious and exhausted.

**TABLE 2:**  
Reported Effects of Child Care Staffing Shortages on Child Care Providers' Well-Being

Feeling	% of Child Care Providers
More stressed	85%
Exhausted/burnt out	75%
More anxious	54%
Harder to decompress during activities outside of work	51%
More depressed	26%

Source: Authors' analysis of RAPID Survey data (2022).  
N = 170

Those who operate child care programs are also feeling the effects of staffing shortages. Table 3 shows that over 75% of child care program directors are concerned about the staffing crisis, with 73% of them worried about retaining the child care employees that they currently have. Over 80% expressed concerns about their ability to pay higher wages. A majority of them agreed that federal support would allow them to provide higher wages and benefits for their employees and help them stay afloat financially.

**TABLE 3:****Child Care Program Directors' Opinions on the Child Care Staffing Crisis**

Statement	% of Child Care Program Directors
I am concerned about the staffing recruitment crisis.	79%
I am concerned about retaining the employees I do have.	73%
I am concerned about how I am going to afford higher wages for myself and my employees.	81%
Federal support would allow me to provide higher wages and benefits to myself and my employees.	81%
Federal support would allow me to stay afloat.	75%

Source: Authors' analysis of RAPID Survey data (2022).

N = 209

Low wages top the list of main barriers to recruiting and retaining qualified staff in child care programs.

As shown in Table 4, the main challenges to recruiting qualified staff that respondents identified were low wages, no or unsatisfactory benefits and underqualified candidates. Table 5 shows that the challenges to retaining staff mirror challenges with recruitment.

**TABLE 4:****Main Challenges to Recruiting Qualified Staff**

Challenge	% of Child Care Providers
Low wages	77%
No/unsatisfactory benefits	55%
Underqualified candidates	50%
Concerns for health and safety	32%
Lack of child care for own children	26%

Source: Authors' analysis of RAPID Survey data (2022).

N = 359

**TABLE 5:**  
**Main Challenges to Retaining Staff**

Challenge	% of Child Care Providers
Low wages	78%
No/unsatisfactory benefits	65%
Underqualified candidates	54%
Concerns for health and safety	28%
Lack of child care for own children	22%

Source: Authors' analysis of RAPID Survey data (2022).  
 N = 359

The results of these surveys show that child care providers who participated in the RAPID Survey are struggling to pay bills while dealing with increased stress. Additionally, the ongoing staffing recruitment crisis is affecting their emotional well-being. Nearly 30% surveyed in May 2022 reported that they were considering leaving the child care field in the next year. Low wages and lack of benefits were both cited as challenges to recruiting and retaining qualified child care professionals.



## Analysis:

### How are CCR&Rs Supporting the Child Care Workforce?

In August 2021, CCAoA sent a survey to CCR&R leaders across the country. The goal of this survey was to discover how CCR&Rs are helping support the child care sector in their communities. Topics in this survey included agency demographic information, programs and initiatives to help child care providers and agency priorities. Responses reflect CCR&R operations as of December 2020. We received 166 complete survey responses, which represented roughly 41% of the total number of CCR&Rs in the United States. A total of 45 states were represented in the survey results. For this analysis, we identified the following research questions:

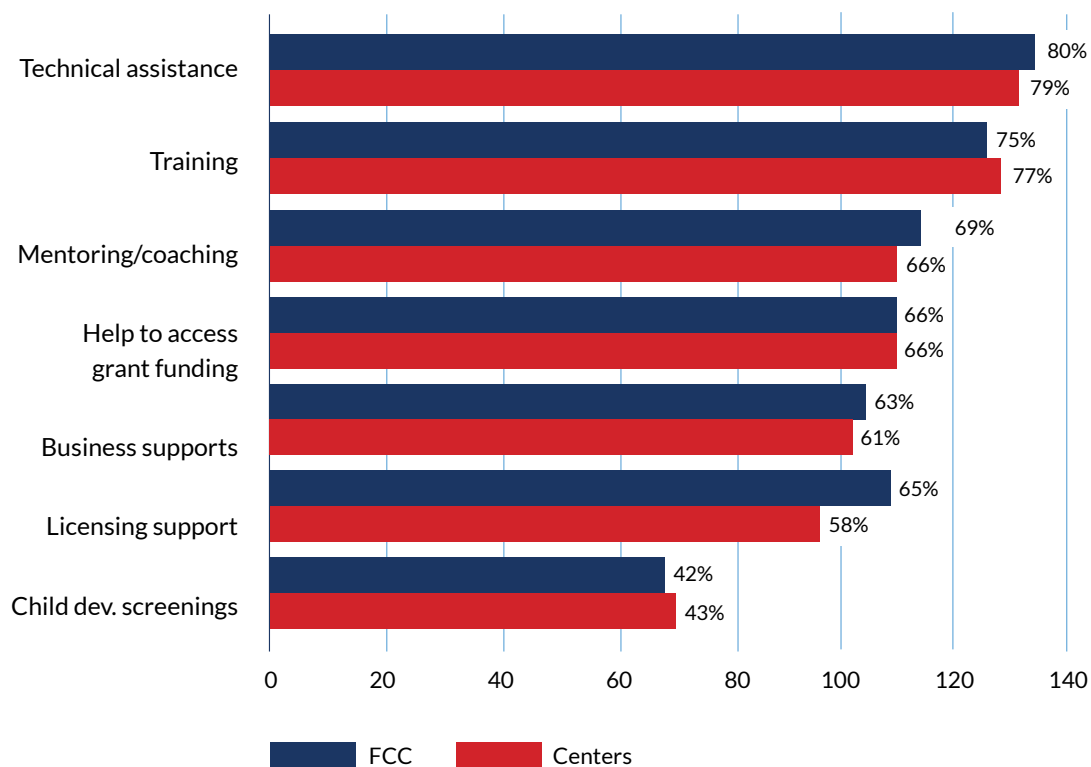
- What services do CCR&Rs provide to child care providers and their staff?
- What strategies are CCR&Rs using to recruit new and retain existing child care providers?
- How are CCR&Rs supporting FCC providers?



Most CCR&Rs offer training and technical assistance to child care providers in their communities. Over half offer providers access to mentoring or coaching, business supports or help accessing grant funding.

**Services Offered to Child Care Providers.** As seen in Figure 6, technical assistance and training were the most provided services to both centers and FCC providers. More than 50% of CCR&Rs also provided the following services to child care providers in both centers and FCCs: mentoring/coaching, accessing grant funding, business supports (e.g., helping providers become better business managers) and licensing support (e.g., helping providers navigate state and local child care regulations).

**FIGURE 6:**  
Services Offered to Child Care Providers by CCR&Rs



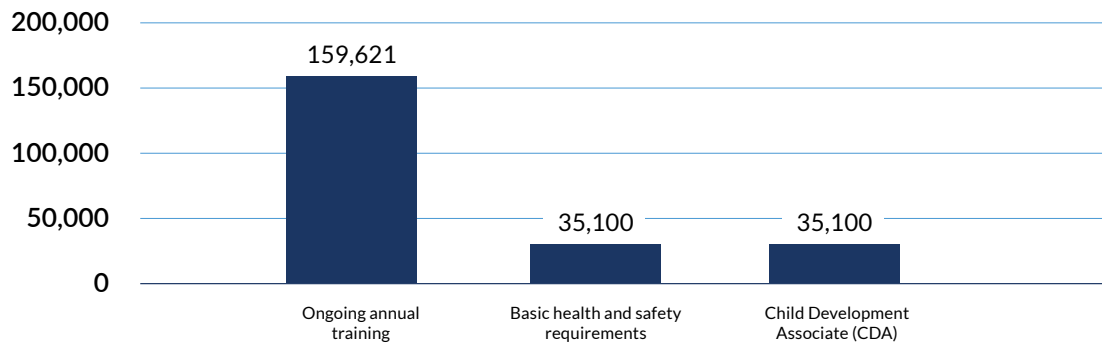
Source: Authors' analysis of CCR&R Landscape Survey data (2022).  
N = 134 CCR&Rs

We also found that CCR&Rs trained hundreds of thousands of child care providers across the country in 2020. As illustrated in Figure 7, the most common training subject was ongoing annual training, followed by basic health and safety requirements. These trainings are critical tools in helping child care providers gain and maintain their licensure to continue serving children in their communities.





**FIGURE 7:**  
Number of Providers Trained by CCR&Rs in 2020



Source: Authors' analysis of CCR&R Landscape Survey data (2022).

Note: Based on responses from 83 CCR&Rs. Some CCR&Rs do not track unduplicated provider numbers. Counts may include providers who took more than one ongoing annual training. CDA is a credential offered to child care providers by the Council for Professional Recognition. Child care providers seeking the credential must have a certain number of formal training and experience hours in order to apply for a CDA.

CCR&Rs recruit new child care providers through diverse strategies such as marketing, community outreach, business supports and partnerships.

**Recruitment Efforts.** We asked respondents to comment on how CCR&Rs are helping to recruit new child care providers for both centers and FCCs. Through this qualitative data analysis, we identified the following themes for both centers and FCCs (with examples of verbatim comments provided in italics):



### Marketing tools such as phone calls, emails, newsletters and websites

- *Advertising campaigns (print ads in newspapers, billboard, radio and TV ads, internet boosted ads).*
- *House a job board and use recruitment brochures. Discuss via phone, email and/or livechat with potential providers. Maintain social media presence on Facebook specific to family child care, leadership, health & safety and business management.*



### Community events such as job fairs, local festivals and block parties

- *Attending job fairs, community fairs and presenting to students interested in a child care career.*
- *Utiliz(ing) close relationships with the Child Nutrition Program staff to recruit potential providers.*



### Pre-service and business training and technical assistance activities

- *Training on how to open and maintain a child care business.*
- *Pre-licensing technical assistance from initial interest to submitting application, including mock inspection.*



### Partnerships with schools, community organizations and government agencies

- *Present(ing) to college classes about child care as a career.*
- *Partner with local career and technology schools, colleges and universities to promote the opportunity for early childhood education students to consider starting their own child care businesses.*
- *Community organizations, such as churches, community interagency groups and schools to identify child care needs and potential providers.*
- *Presenting to other county agencies that serve children and families to educate them on types of child care so they can recruit providers.*

We also identified a few recruitment strategies more common for FCCs. These included word of mouth (e.g., offering bonuses to current FCC providers who recruited new FCC providers) and assisting with start-up fees. Starting a new home-based child care business can be expensive, with estimates ranging from \$2,000<sup>28</sup> to \$5,000<sup>29</sup>. Start-up fee assistance can help new providers get licensed and buy the supplies they need.

Many CCR&Rs offer training, technical assistance, grant application assistance, resource sharing and gifts to encourage providers to remain in the child care workforce.

**Retention Efforts.** Similar to our recruitment questions, we asked CCR&Rs to describe the ways in which they help retain existing child care providers. We identified similar themes in retention strategies for both centers and FCCs (with examples of verbatim comments provided in italics).



### **Training and technical assistance opportunities**

- *We pay for training that is needed based on feedback from centers in the catchment area. We also host trainings occasionally.*
- *Free professional development training (offered free instead of for a fee due to COVID-19).*
- *Develop and provide professional development opportunities to all early childhood professionals in our counties.*



### **Assisting child care programs with completing financial assistance/grant applications**

- *Supporting them with applying for funding opportunities.*
- *Guidance for grant applications and local finance assistance.*



### **Resource sharing**

- *Offering different resources such as our food pantry, child care services and more helps those new recruits stay engaged.*
- *Develop accessible resources, including business resources (e.g., online tools and coaching videos on best practices).*



### **Gifts and incentives for providers**

- *Free classroom gifts when completing training series.*
- *Gifts for Provider Appreciation Day®.*
- *Incentives: e.g., hotel stays, cleaning supplies, thermometers, massages, free car wash, weekend getaways, books, toys, whatever we can get donated or grant funds to purchase.*

CCR&Rs use different strategies to support FCC providers, which include providing supplies, dedicated CCR&R staff members and virtual training or meetings.

**Innovative Strategies to Support FCC Providers.** As we noted in our [2021 Child Care Landscape Analysis](#), the number of FCC providers has continued to decrease since 2019. FCC providers are a critical part of our child care system. They often fill gaps in a community, such as in rural areas or for families who need care outside of traditional business hours. Keeping these providers in business and giving them the support they need is a priority for many CCR&Rs. The survey asked CCR&Rs to comment on any innovative strategies or approaches they are using to support FCC providers.

In our analysis of this question, we identified the following themes (with examples of verbatim comments provided in italics):



### Providing supplies

- *We applied for a grant to allow us to distribute \$100 [grocery store] gift cards to providers that closed due to COVID.*
- *We created and dispersed baskets of items related to their needs for: health and safety, infant toys, teacher resource books, preschool activities.*



### Virtual trainings and meetings

- *Virtual office hours on Zoom — help providers access a coach during the day without need to take time to leave the program, get a sub, etc.*
- *Live virtual training to meet Licensing Requirements and further professional development. Live virtual director/owner discussions.*



### Dedicated support staff members at CCR&Rs

- *We have assigned specialists who work heavily with FCC[s]. They have created cohorts, professional learning communities to provide connection and support across the providers. Our Business Practices Department has specialists working only with FCC to improve business practices.*
- *We have a specialist specifically for this population (Family Child Care Support Specialist).*

For decades, CCR&Rs have remained committed to supporting child care providers in addition to their traditional role as child care referral specialists to families. The COVID-19 pandemic presented CCR&Rs with unprecedented challenges, but they have worked hard to support child care providers through this very rough time.



# Child Care Affordability

Child care [continues to be unaffordable](#)<sup>30</sup> for many families. Child care is a labor-intensive industry, with small teacher-child ratios (particularly for infants and toddlers) that support health, safety and child development. Years of low wages and the safety hazards associated with the COVID-19 pandemic have led to a dramatic loss in the [child care workforce](#)<sup>31</sup>, which could be costly to reverse.

Child care is considered too costly for many families, but family tuition and state and federal support do not currently cover the true cost of care or support higher wages and benefits for the workforce. A [recent model developed](#)<sup>32</sup> by the Federal Reserve Bank of St. Louis identifies raising wages as one strategy to address attrition in the early learning workforce. They estimated that raising the hourly wage for the child care workforce to at least \$15 per hour could raise the average child care price by nearly \$1,000 per year which, absent additional public investment, would be passed on to families. Lack of affordable child care can affect parents' ability to enter the labor force. This is [particularly true for women](#),<sup>33</sup> many of whom are forced to leave the labor force due to lack of affordable child care. In one study, women were more likely to work in states that had less expensive child care options and more free options such as Head Start.<sup>34</sup>

## Analysis:

### Comparing Child Care Prices for Households with Different Demographics

Child care was least affordable for households of color who are headed by divorced or single parents.

In October 2022, CCAoA released our [Child Care Affordability Analysis](#). This report provided updated child care price data as of 2021, along with comparisons of child care prices to median household income for married couples with children and single, female-led families. However, with this report we aim to better understand how child care prices compare to the median household income of U.S. families with diverse demographics. To that end, we incorporated marital status and race/ethnicity data from the [2021 Annual Social and Economic Supplement \(ASEC\)](#)<sup>35</sup> conducted by the U.S. Census Bureau into our analyses. We filtered this dataset to include households using the following variables:

- Households with at least one child under age 6
- Head of household is in the labor force

In our analysis, we created cross-tabulations with the following variables:

- Race of household members
- Hispanic/Latino ethnicity of household members
- Marital status: married, divorced and single/never married
- Median income in 2021

We compared the 2021 annual national average price of child care from the [Child Care Affordability Analysis](#) (\$10,681) to the median income of households with young children by three marital status types and the race/ethnicity of household members. Table 6 shows that child care prices can cost married couple households anywhere from 7% to 14% of their household income, depending on their racial group. Among households led by divorced parents, child care could cost between 20% for households that identify as multiracial to 31% for American Indian/Alaska Native households. Finally, for households led by a single parent who has never been married, child care can cost a range of 31% of median income for White and Asian households to 49% of median income for American Indian/Alaska Native households.

**TABLE 6:****Child Care Affordability Percentage by Household Marital Status Type and Race**

<b>Marital Status*</b>	<b>Racial Group**</b>	<b>Median Income, 2021***</b>	<b>Affordability Percentage****</b>
<b>Married</b>	American Indian/ Alaska Native	\$76,000	14%
	Asian	\$151,200	7%
	Black/African American	\$93,632	11%
	Hawaiian/ Pacific Islander	\$77,656	14%
	More than one race	\$89,138	12%
	White	\$111,200	10%
<b>Divorced</b>	American Indian/ Alaska Native	\$35,001	31%
	Asian	\$25,001	43%
	Black/African American	\$38,701	28%
	Hawaiian/ Pacific Islander	\$40,045	27%
	More than one race	\$53,874	20%
	White	\$45,011	24%
<b>Single/Never Married</b>	American Indian/ Alaska Native	\$21,600	49%
	Asian	\$35,000	31%
	Black/African American	\$30,000	36%
	Hawaiian/ Pacific Islander	\$26,000	41%
	More than one race	\$30,516	35%
	White	\$34,001	31%

\*US Census Bureau [definition](#) for married-couple families and single parent households. The American Community Survey does not have data on two-parent, non-married couple households, so we were unable to include these families in our analysis.

\*\*Households with at least one child under age 6 and respondent is in the labor force. Unweighted N = 10,494.

\*\*\*Source: 2021 Annual Social and Economic Supplement (ASEC). Accessed via [IPUMS CPS](#) online analysis tool.

\*\*\*\*Median income compared to national average child care price of \$10,681.31 for 2021 (average includes the prices for centers and FCC providers for infants and 4-year-olds).



Overall, child care is less affordable for Hispanic/Latino households when compared to non-Hispanic/Latino households.

Similarly, we compared the national average price of child care to various Hispanic/Latino nationality backgrounds. Table 7 shows that child care is less affordable for married couple Hispanic/Latino families than non-Hispanic/Latino families. For example, a household that identifies as Mexican pays on average 15% of income toward child care, compared to 9% for a non-Hispanic/Latino household. Overall, we found that households of color typically have lower median incomes when compared to White households. This can result in families of color having an increased price burden when paying for child care.

**TABLE 7:**

**Child Care Affordability Percentage by Household Marital Status Type and Hispanic/Latino Background**

<b>Martial Status*</b>	<b>Hispanic/Latino Background**</b>	<b>Median Income, 2021***</b>	<b>Affordability Percentage****</b>
<b>Married</b>	Not Hispanic/Latino	\$121,000	9%
	Mexican	\$70,002	15%
	Puerto Rican	\$93,165	11%
	Cuban	\$98,050	11%
	Dominican	\$73,900	14%
	Salvadoran	\$57,002	19%
	Other Hispanic/Latino	\$82,000	13%
	Central American (excluding Salvadoran)	\$63,310	17%
	South American	\$76,875	14%



Martial Status*	Hispanic/Latino Background**	Median Income, 2021***	Affordability Percentage****
<b>Divorced</b>	Not Hispanic/Latino	\$45,000	24%
	Mexican	\$40,000	27%
	Puerto Rican	\$60,000	18%
	Cuban	\$28,000	38%
	Dominican	\$32,001	33%
	Salvadoran	\$18,000	59%
	Other Hispanic/Latino	\$28,402	38%
	Central American (excluding Salvadoran)	\$95,500	11%
	South American	\$60,640	18%
<b>Single/Never Married</b>	Not Hispanic/Latino	\$33,000	32%
	Mexican	\$34,184	31%
	Puerto Rican	\$22,220	48%
	Cuban	\$28,202	38%
	Dominican	\$42,004	25%
	Salvadoran	\$25,000	43%
	Other Hispanic/Latino	\$39,252	27%
	Central American (excluding Salvadoran)	\$33,001	32%
	South American	\$33,401	32%

\*US Census Bureau [definition](#) for married-couple families and single parent households. The American Community Survey does not have data on two-parent, non-married couple households, so we were unable to include these families in our analysis.

\*\*Filter: Households with at least one child under age 6 and respondent is in the labor force. Unweighted N = 10,494.

\*\*\*Source: 2021 Annual Social and Economic Supplement (ASEC). Accessed via [IPUMS CPS](#) online analysis tool.

\*\*\*\*Median income compared to national average child care price of \$10,681.31 for 2021.

## Analysis:

### Child Care Affordability at a Local Level

Descriptive statistics suggest that child care accounts for higher percentages of household income in higher-poverty counties compared to lower-poverty counties.

Using data<sup>36</sup> from The Women's Bureau,<sup>37</sup> a division of the U.S. Department of Labor, CCAoA examined child care price data for all counties in the U.S. for the year 2018. Table 8 shows selected results from our cross-tabulation of county poverty rate by the average percentage of a family's income spent on infant center-based child care and by the average percentage of a family's income spent on preschool center-based child care. The presented results demonstrate that there can be large differences in affordability within a state. These differences may be due to county-level variability in child care prices and/or county-level median household incomes. Preliminary correlational analyses, however, did not provide strong evidence of an association between county poverty level and the percentage of the county's family median income accounted for by infant or preschool care ( $r = .02$  and  $.06$ , respectively;  $r_{\text{preschool}}$  is significant at  $p < .01$ ). Future research should examine how different factors may impact the affordability of care in different locations such as differences in the cost of care by area, availability of federally- and state-funded programs and other resources.



**TABLE 8:**

### Selection of States with Large Affordability Differences Between Counties with Low Income and Counties with High Income

State	County	Poverty Rate	Percentage of Annual Income, Infant/Center	Percentage of Annual Income, Preschool/Center
Alabama	Greene	33.4%	25.8%	25%
	Shelby	5.1%	11.8%	10.6%
Illinois	Alexander	22.9%	25.1%	18.7%
	Kendall	3.5%	16.2%	12.0%
New York	Bronx	26.1%	54.3%	38.7%
	Nassau	4.0%	16.7%	14.3%
Ohio	Scioto	17.8%	18.8%	15.7%
	Delaware	3.0%	12.2%	9.5%
Oklahoma	Adair	23.2%	20.0%	16.8%
	Canadian	5.7%	14.4%	12.1%
Texas	Brooks	33.9%	29.4%	24.8%
	Williamson	4.5%	11.2%	9.6%
South Carolina	Dillon	28.5%	21.7%	18.4%
	Beaufort	7.1%	12.9%	11.7%
South Dakota	Todd	52.1%	22.2%	21.6%
	Lincoln	1.8%	8.8%	7.9%
Utah	San Juan	19.4%	17.5%	15.7%
	Davis	4.5%	11.9%	9.3%
Virginia	Norton City	31.3%	21.3%	22.2%
	Loudoun	2.3%	14.1%	12.2%

Source: Author's analysis of Women's Bureau Child Care Cost Database (2022).

Descriptive statistics suggest that child care is less affordable in majority Black counties as compared to majority White counties.

For the same time period (2018), descriptive statistics showed that in counties that are more than 50% Black, child care accounted for a higher percentage of family income when compared to counties with majority White populations (Table 9). Correlational analyses provided some support for this finding, though the correlation coefficients were small ( $r_{50\%White} = -.11, r_{50\%Black} = .08, p < .001$ ).

**TABLE 9:**  
**Child Care Affordability – Majority White vs. Majority Black Counties**

Poverty Rate	Percentage of Annual Income, Infant/Center	Percentage of Annual Income, Preschool/Center
33.4%	25.8%	25%
5.1%	11.8%	10.6%

Source: Author’s analysis of Women’s Bureau Child Care Cost Database (2022).



# About the Data and Analyses

## Data

The Women's Bureau, a division of the U.S. Department of Labor, houses a [new database](#) created by the federal government that allows users to analyze historical child care prices at the county level. Starting in 2019, the Women's Bureau began requesting county-level child care price data from all counties in each state. The National Database of Childcare Prices (NDCP) was released to the public in September 2022. Using data from state Market Rate Surveys and the American Community Survey (ACS), this database includes median prices and 75th percentile prices for different provider types and student age groups from 2008 to 2018. The NDCP also includes county poverty rates, county percentage of population from each race/ethnicity, and county median household income.

## Analyses

We examined child care price data for all counties in the U.S. for the year 2018 – the most recent year that data were available. For this analysis, we used county median price of child care for infants and preschool-age children at center-based providers and FCCs. Additionally, we used county poverty rates and median household income. County median price of child care was divided by the county median household income to calculate county affordability. For each state, we identified the counties with the highest and lowest levels of poverty and compared child care affordability for these counties (see Table 8). Bivariate Pearson correlations were run to gain an understanding of the association between county characteristics and county child care affordability.

The NDCP is a valuable tool for researchers to examine the differences in child care prices at the county level. The longitudinal nature of this dataset is useful when analyzing trends in child care prices from 2008 to 2018. While this dataset comprises pre-pandemic child care prices, it provides a clear picture of the price disparities among and within states. This database can also serve as a baseline for historical child care price data.



# Child Care Supply

The COVID-19 pandemic caused child care supply issues in a system that was already weak and fragmented.<sup>38</sup> In our [Child Care Landscape Analysis](#),<sup>39</sup> CCAoA found that while the number of open center-based programs increased somewhat from 2020 to 2021, this number is still lower than it was in 2019. Meanwhile, the number of family child care homes continues to decline, though at what appears to be a slower rate than in the previous year.

Other researchers have found similar trends in child care supply. The [Bipartisan Policy Center](#)<sup>40</sup> found a potential child care need for 11.1 million children with a child care supply of only 7.8 million slots – a child care supply gap for over 3 million children. Even before the pandemic, lack of child care supply was an issue for many families. In 2018, the [Center for American Progress](#)<sup>41</sup> estimated that 51% of families live in an area with an inadequate supply of child care.

## Analysis:

### Licensed Child Care Slots Versus Potential Demand

Nationally, there was a child care supply gap of 3.6 million slots in 2021.

For this report, we compared the number of licensed slots that were reported in our 2021 annual survey to potential child care demand for young children. To complete this analysis, we included the following variables.

- **Licensed child care slots:** the total licensed capacity for center-based programs and FCC providers reported by states on the 2021 CCAoA annual survey. This measure refers to the maximum number of children for which a program is licensed to care. For this analysis, we only included potential demand for the 43 states that reported licensed child care slot numbers in our 2021 annual survey.
- **Potential child care demand:** This data point was gathered from the 2021 one-year estimates from the [American Community Survey](#),<sup>42</sup> a product of the U.S. Census Bureau. [Table B23008](#)<sup>43</sup> lists the total number of children under age 6 in each state with all parents in the workforce. We use this number as a proxy for potential child care demand.

Based on the analysis of 43 states that reported licensed capacity data, there were a total of 8.7 million slots in licensed child care centers and FCC providers in 2021. The number of children who potentially needed child care in these states totaled 12.3 million in 2021. This leaves a licensed child care supply gap of 3.6 million slots, which is similar to but slightly higher than what was found in the [Bipartisan Policy Center report](#) referenced above.<sup>44</sup>

**This leaves a licensed child care supply gap of 3.6 million slots, which is similar to but slightly higher than what was found in the Bipartisan Policy Center report referenced above.**<sup>44</sup>



All four U.S. regions have fewer licensed child care slots than potential demand. The South and West each had a supply gap of over one million licensed child care slots in 2021.

We also conducted an analysis of these numbers at the regional level. Table 10 shows that the South and West regions had the largest supply gaps of over one million licensed child care slots each. However, the Northeast and Midwest each have a supply gap of over half a million.

**TABLE 10:**  
Licensed Child Care Slots and Potential Demand by Region, 2021

Region	Total Number of Licensed Child Care Slots	Total Children Under Age 6 with All Parents in Workforce	Difference between Supply and Potential Demand
Midwest	2.2 million	3.2 million	-992,752
Northeast	847,736	1.5 million	-622,067
South	3.9 million	4.9 million	-1.01 million
West	1.7 million	2.7 million	-1.03 million

Source: Author’s analysis of 2021 CCAoA Annual Survey data and American Community Survey Table B23008 (2021, one-year estimates)

## Conclusion

CCAoA’s data and analysis complement the reports of many other organizations and create new knowledge about the supply and affordability challenges families face in accessing high-quality child care. Families face child care disruptions in addition to stresses associated with rising prices and economic uncertainty. Child care workforce turnover continues to challenge the ability of child care providers to adequately staff their programs. Child care continues to be unaffordable for many families while wages and other compensation for the child care workforce remain too low. This research supports a call for bold policy action aimed at increasing the supply of child care to support children, families and the workforce. Policymakers, system leaders and other stakeholders should commit to increased investment in the child care and early learning system, and take steps to address gaps in supply, high prices for families, and inadequate compensation for workers. Learn more about CCAoA’s policy and advocacy work and how you can be an advocate for child care change [here](#).

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