



Final Report:

SAN MATEO COUNTY PROFILE

San Mateo County

Child Care Needs Assessment 2022 and 2032:

Supply and Demand Summary

Prepared for

San Mateo County Child Care Partnership Council,

San Mateo County Office of Education, and San Mateo County Superintendent of Schools



Prepared by

Brion Economics, Inc.

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SAN MATEO COUNTY CHILD CARE SUMMARY

Brion Economics, Inc. prepared this summary report for the San Mateo County Office of Education (SMCOE), in partnership with the San Mateo County Child Care Partnership Council, First 5 San Mateo County, and the Silicon Valley Community Foundation. This summary report is based on a countywide study of child care needs for children 0 to 12 years old and is one part of a larger, countywide study that identifies current and future child care needs by city, also known as supply and demand analysis.

DEMOGRAPHICS¹

San Mateo County	2022	2032	Net Change	% Change
Total Population	804,739	863,164	58,424	7.3%
Total Employees	405,687	428,285	22,598	5.6%
Children Under 2 Years Old	18,127	17,899	(229)	-1.3%
Children 2 to 4 Years Old	27,596	27,394	(201)	-0.7%
Children 5 to 12 Years Old	63,843	63,833	(10)	0.0%
Total Children 0 to 12 Years Old	109,566	109,126	(440)	-0.4%
Children 0 to 12 as % of Total Population	13.6%	12.6%	-1.0%	

Note: 40% of 4-year-olds are shifted to School Age, or 5- to 12-year-olds at 2032 for Transitional Kindergarten.

CHILD CARE SUPPLY AND DEMAND AS OF 2022

- **Child Care Providers:** 1,009 total providers: 525 Family Child Care Homes (FCCH Spaces) and 484 Child Care Centers (Center Spaces) with a total of 41,347 spaces.
- **2022 Estimated Supply of Child Care Spaces²**

San Mateo County Supply of Child Care Spaces - 2022				
Age of Children	FCCH Spaces	Center Spaces	Total Spaces	% of Supply
Infants	1,334	1,591	2,925	7%
Preschool	2,669	16,071	18,740	45%
School Age	1,763	17,919	19,682	48%
Total Supply	5,766	35,581	41,347	100%
% of Supply	14%	86%	100%	

- **Change in Family Child Care Homes – 2017 to 2022:** There has been a loss of 101 FCCHs in San Mateo in the last five years, or since 2017 or a 16% reduction in providers. This equates to a loss of 897 spaces or a 13% loss in spaces. It should be noted that not all FCCHs are in operation; they may have closed temporarily and are holding onto their license.

¹ Population and employment data is from ABAG's *Projections 2040*, ELNAT, and ABAG's *Projections 2013*. Please note that totals in charges may be slightly off due to rounding.

² Infants include birth up to 2 years, Preschool includes 2 to 4 year olds, and School Age includes 5 to 12 year olds.

2017 to 2022 Change in Supply of FCCHs - San Mateo County				
Age of Children	FCCH Spaces 2017	FCCH Spaces 2022	Net Change	% Change
Under 2 Years Old	2,332	1,334	(998)	-43%
2 to 4 Years Old	2,932	2,669	(263)	-9%
5 to 12 Years Old	1,399	1,763	364	26%
Total Supply	6,663	5,766	(897)	-13%
No. of Providers	626	525	(101)	-16%

- **Change in Supply of Center-Based Child Care Spaces – 2017 to 2022:** From 2017 there was a loss of 62 center-based child care centers or a loss of 11%. Overall, there was an increase in the supply of spaces by 8% or a total of 2,716 spaces. There was an increase in Infant spaces of 113 spaces, and 2,829 School Age spaces.

2017 to 2022 Change in Supply of Center-Based Spaces - San Mateo County				
Age of Children	Center Spaces 2017	Center Spaces 2022	Net Change	% Change
Under 2 Years Old	1,478	1,591	113	8%
2 to 4 Years Old	16,297	16,071	(226)	-1%
5 to 12 Years Old	15,090	17,919	2,829	19%
Total Supply	32,865	35,581	2,716	8%
No. of Providers	546	484	(62)	-11%

- **Overall Change in Supply of Child Care Spaces – 2017 to 2022:** Between 2017 and 2022 there was a loss of 163 child care providers or a 14% reduction. In total, there was a loss of 885 Infant spaces (23% loss), 489 Preschool spaces (3% loss), and an increase of 3,193 School Age spaces (19% increase). This equates to an overall increase in total spaces of 5% over the last five years.

2017 to 2022 Change in Supply of All Spaces - San Mateo County				
Age of Children	All Spaces 2017	All Spaces 2022	Net Change	% Change
Under 2 Years Old	3,810	2,925	(885)	-23%
2 to 4 Years Old	19,229	18,740	(489)	-3%
5 to 12 Years Old	16,489	19,682	3,193	19%
Total Supply	39,528	41,347	1,819	5%
No. of Providers	1,172	1,009	(163)	-14%

- **2032 Estimated Supply of Child Care Spaces and Net Change from 2022**

2032 Supply in San Mateo County					Change 2022 to 2032	
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply	Net Change	% Change
Infants	1,349	1,813	3,162	7%	237	8%
Preschool	2,684	16,881	19,565	46%	825	4%
School Age	1,763	17,919	19,682	46%	-	0%
Total Supply	5,796	36,613	42,409	100%	1,062	3%
% of Supply	14%	86%	100%			

- **Planned Spaces:** In the County as a whole, there are 27 new planned child care projects with 237 Infant and 825 Preschool spaces for a total of 1,062 new child care spaces for ages 0 to 4 years old. There are no known School Age projects at this time.
- **2022 Estimated Demand for Licensed Child Care Spaces:** Total need equals 58,505 spaces, including 53,574 spaces for residents and 4,930 spaces for non-resident employees working in San Mateo County and commuting in from outside the County. Infants represent 15% of demand, Preschool 34% of demand, and School Age 51% of demand.

San Mateo County Demand for Child Care Spaces - 2022				
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	Percent Distribution
Infants	6,743	1,972	8,715	15%
Preschool	16,889	2,958	19,847	34%
School Age	29,942	-	29,942	51%
Total Demand	53,574	4,930	58,505	100%
% of Demand	92%	8%	100%	

- **2032 Estimated Demand for Licensed Spaces and Net Change over 2022**

Countywide Demand 2032					Change 2022 to 2032	
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	% of Demand	Net Change	% Change in Demand
Infants	6,265	2,088	8,353	13%	(362)	-4%
Preschool	16,683	3,133	19,815	31%	(31)	-0.2%
School Age	36,169	-	36,169	56%	6,227	21%
Total Demand	59,116	5,221	64,337	100%	5,833	10%
% of Demand	92%	8%	100%			

- **Estimated Shortage or Surplus of Child Care Spaces at 2022 and 2032**

Estimated Surplus or Shortage by Year - San Mateo County				
Age Group	Shortage of Spaces - 2022	% of Demand Met - 2022	Shortage of Spaces - 2032	% of Demand Met - 2032
Infants	(5,790)	34%	(5,191)	38%
Preschool	(1,107)	94%	(250)	99%
School Age	(10,260)	66%	(16,487)	54%
Total Surplus/(Shortage)	(17,157)	71%	(21,928)	66%

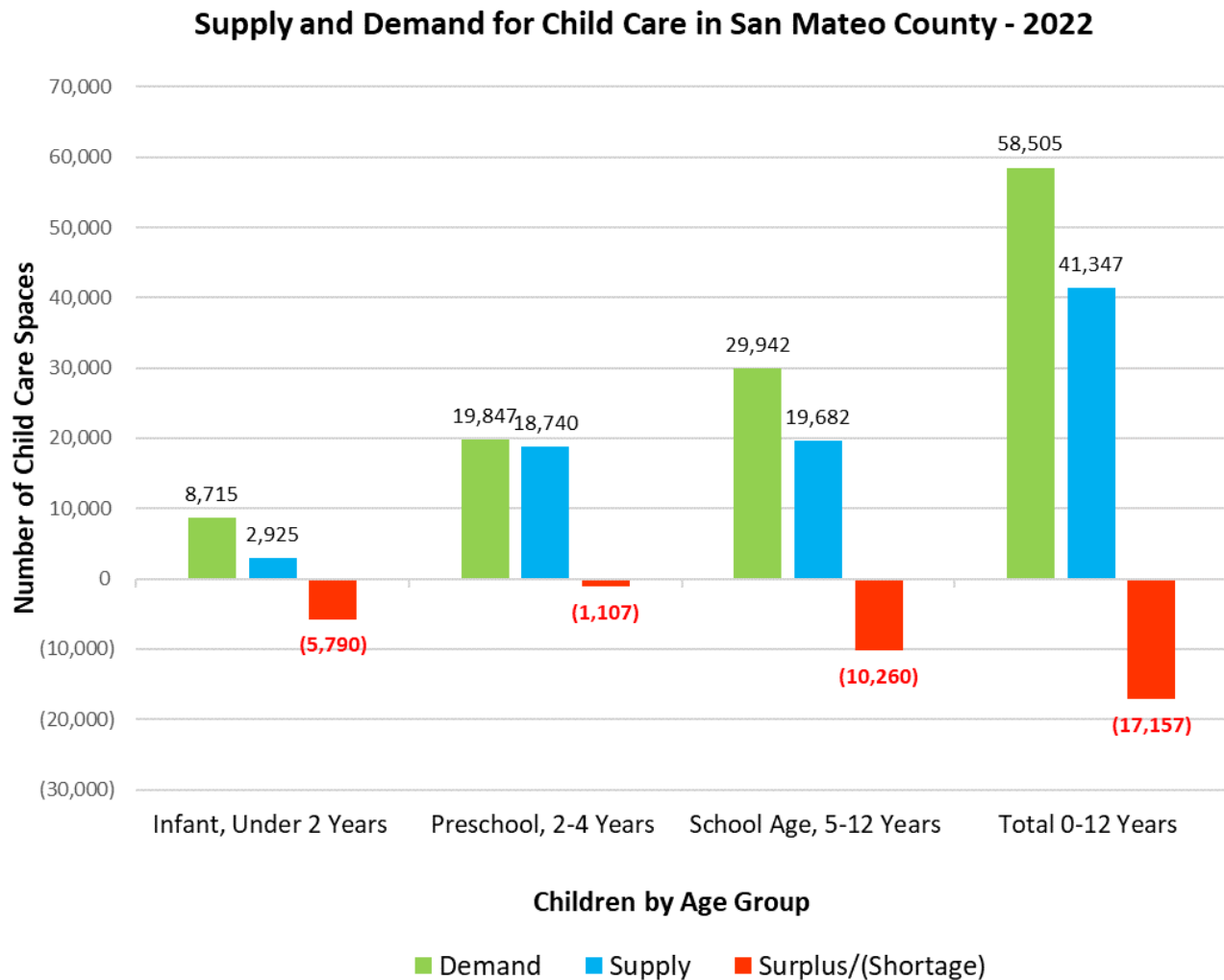
- **Subsidized Need and Spaces in 2022:**³ According to data from SMCOE and the California Department of Education, San Mateo County has 409 Infant, 2,895 Preschool and 3,794 School Age subsidized spaces. This translates into 17% of the supply of child care spaces in the County. There is a need for about 33,000 subsidized spaces countywide. Currently, about 21%

³ Includes State Preschool, General Child Care, ASES, Early Head Start, and Head Start, CalWORKs – Stage 2 and 3, and Alternative Payment programs. Age groups for subsidized care are Infants, birth to 2 years old, and Preschool, 3 and 4 years old.

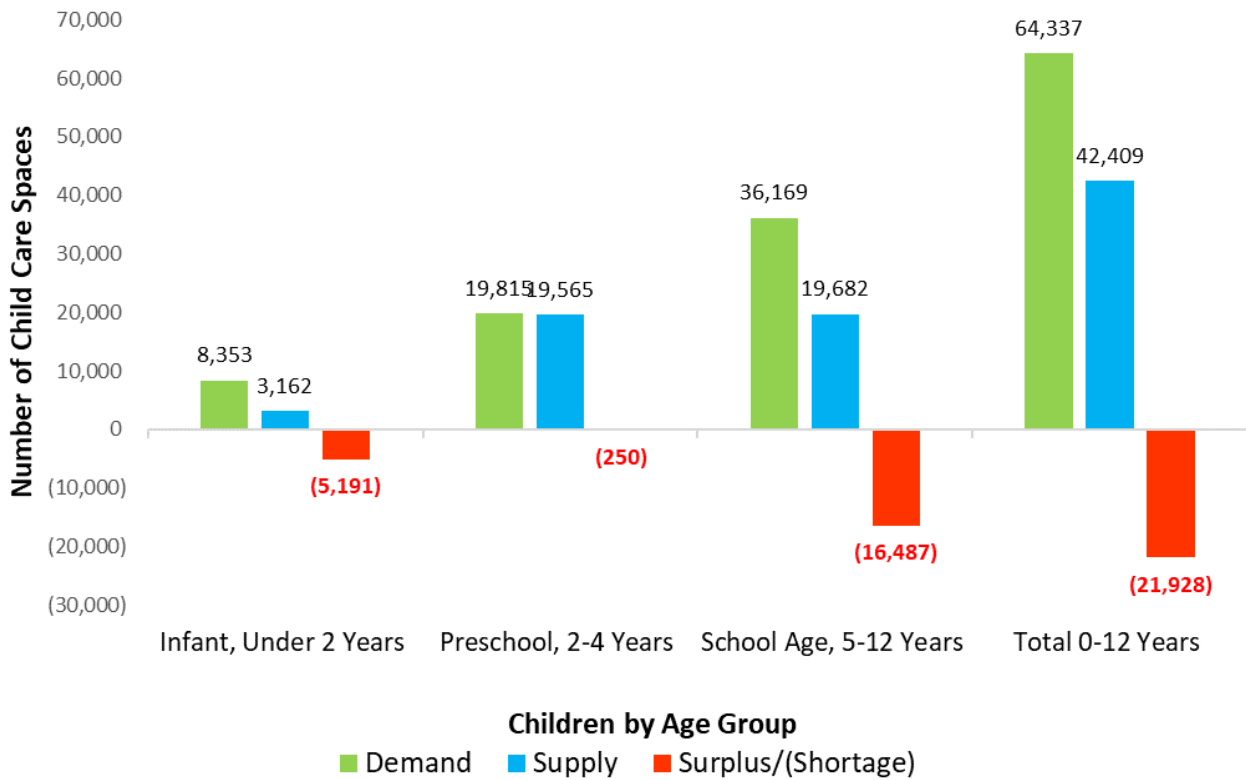
of the current need is being met countywide. For Infants, 4% of demand, 52% of Preschool demand, and 21% of School Age demand for subsidized care is being met, respectively.

Estimated Need for Subsidized Care Countywide - 2022				
Items	Infants	Preschool	School Age	Total, 0 -12 Years
Estimated Children	28,188	17,525	63,843	109,556
Need for Subsidized Spaces	9,619	5,582	17,821	33,023
Percent of Total Children	34%	32%	28%	30%
Enrollment in Subsidized Care	409	2,895	3,794	7,098
Unmet Need	(9,210)	(2,687)	(14,027)	(25,925)
% of Need Met for Subsidized Care	4%	52%	21%	21%

▪ Supply and Demand Summary by Year



Supply and Demand for Child Care in San Mateo County - 2032



METHODOLOGY OVERVIEW

- **Resident Population:** Total population and children estimates are based on ABAG’s *Projections 2040* for 2022 and 2032. Population data from the Early Learning Needs Assessment Tool (ELNAT) is incorporated to estimate children by age for each City/Area and countywide.
- **Child Care Demand by Age Group:** The following factors are applied to estimates of total children by age group and year. These data are from the *2022 Parent Survey* (see Chapter 3 of the full Needs Assessment) prepared for this study.

Age Group	2022 Demand	2032 Demand	Difference
Infants - Under 2 Years	37.2%	35.0%	-2.2%
Preschool, 2-4 Years	61.2%	68.8%	7.7%
School Age, 5 or older	46.9%	54.0%	7.2%

- **Transitional Kindergarten (TK):** For 2032 estimates, 40% of 4-year-olds are assumed to utilize TK, increasing the need for School Age child care spaces, and decreasing the need for Preschool spaces. These 4-year-olds are included in the School Age category of children 5 to 12 years old for 2032.

- **Employee Demand:** Using the 2019 5-Year American Community Survey Journey-to-Work data, the number of employees that work in each City/Area and reside outside of San Mateo County is calculated. It is assumed that 3.0% of these non-resident employees commuting from outside the County require child care in the City/Area where they work. This total demand is split 40% for Infant spaces and 60% for Preschool spaces.⁴
- **Subsidies:** Subsidized space data and analysis is from a combination of sources including SMCOE 2022 survey results of direct state contracts, and CalWORKs Stage 2 and 3, Alternative Payment (AP) data from California Department of Education, and CD-801A Monthly Report for October 2020,⁵ by family residence location. Note that the Early Learning Needs Assessment Tool (ELNAT) does not provide 2020 subsidized data for School age children. ELNAT data is by zip code and has to be combined and/or divided into the study's defined Cities/Areas.

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- Child Care Coordinating Council of San Mateo County (also known as 4Cs);
- San Mateo County Office of Education; and,
- Child Care Needs Assessment Ad Hoc Committee Members

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⁴ It is assumed that School Age children of non-resident employees require child care near their school.

⁵ This is the most current data available.