



*Final Report:*

# HALF MOON BAY REGION PROFILE

*(includes City of Half Moon Bay, El Granada, Montara, and Moss Beach)*

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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## HALF MOON BAY REGION CHILD CARE SUMMARY<sup>1</sup>

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.

### DEMOGRAPHICS<sup>2</sup>

Half Moon Bay Region	2022	2032	Net Change	% Change
<b>Total Population</b>	<b>25,304</b>	<b>25,459</b>	<b>155</b>	<b>0.6%</b>
Total Employees	9,875	10,002	127	1.3%
Children Under 2 Years Old	374	355	(19)	-5.2%
Children 2 to 4 Years Old	792	751	(41)	-5.2%
Children 5 to 12 Years Old	1,716	1,647	(68)	-4.0%
<b>Total Children 0 to 12 Years Old</b>	<b>2,882</b>	<b>2,753</b>	<b>(129)</b>	<b>-4.5%</b>
Children 0 to 12 as % of Total Population	11.4%	10.8%		-0.6%

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:** 30 total providers: 14 Family Child Care Homes (FCCH Spaces) and 16 Child Care Centers (Center Spaces) with a total of 834 spaces.
- **2022 and 2032 Estimated Supply of Child Care Spaces<sup>3</sup>**

2022 Supply in Half Moon Bay Region				
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply
Infants	32	36	68	8%
Preschool	64	279	343	41%
School Age	40	383	423	51%
<b>Total Supply</b>	<b>136</b>	<b>698</b>	<b>834</b>	<b>100%</b>
% of Supply	16%	84%	100%	

2032 Supply in Half Moon Bay Region					Change 2022 to 2032	
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply	Net Change	% Change
Infants	32	54	86	10%	18	26%
Preschool	64	279	343	40%	-	0%
School Age	40	383	423	50%	-	0%
<b>Total Supply</b>	<b>136</b>	<b>716</b>	<b>852</b>	<b>100%</b>	<b>18</b>	<b>2%</b>
% of Supply	16%	84%	100%			

<sup>1</sup> Includes the City of Half Moon Bay, and unincorporated areas around HMB, El Granada, Montara, and Moss Beach.

<sup>2</sup> Population and employment data is from ABAG's *Projections 2040*, ELNAT, and ABAG's *Projections 2013*. Please note that totals in charts may be slightly off due to rounding.

<sup>3</sup> Infants include birth up to 2 years, Preschool includes 2 to 4-year-olds, and School Age includes 5 to 12-year-olds.

- **Planned Spaces:** In the Half Moon Bay Region, there is one new planned child care project with 18 Infant spaces.
- **2022 Estimated Demand for Licensed Child Care Spaces:** Total need equals 1,508 spaces, including 1,429 spaces for residents and 79 spaces for non-resident employees working in the Half Moon Bay Region and commuting in from outside the County.

2022 Demand in Half Moon Bay Region				
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	% of Demand
Infants	139	32	171	11%
Preschool	485	48	532	35%
School Age	805	-	805	53%
<b>Total Demand</b>	<b>1,429</b>	<b>79</b>	<b>1,508</b>	<b>100%</b>
% of Demand	95%	5%	100%	

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

2032 Demand in Half Moon Bay Region					Change 2022 to 2032	
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	% of Demand	Net Change	% Change in Demand
Infants	124	32	156	10%	(15)	-9%
Preschool	448	48	496	31%	(36)	-7%
School Age	944	-	944	59%	139	17%
<b>Total Demand</b>	<b>1,516</b>	<b>80</b>	<b>1,596</b>	<b>100%</b>	<b>88</b>	<b>6%</b>
% of Demand	95%	5%	100%			

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

Estimated Surplus or Shortage of Spaces by Year - Half Moon Bay Region				
Age Group	Surplus (Shortage) - 2022	% of Demand Met - 2022	Surplus (Shortage) - 2032	% of Demand Met - 2032
Infants	(103)	40%	(70)	55%
Preschool	(189)	64%	(153)	69%
School Age	(381)	53%	(520)	45%
<b>Total Surplus/(Shortage)</b>	<b>(674)</b>	<b>55%</b>	<b>(744)</b>	<b>53%</b>

- **Subsidized Need and Spaces:**<sup>4</sup> According to data from SMCOE and the California Department of Education, the Half Moon Bay Region has 17 Infant and 93 Preschool subsidized spaces. According to 2020 data for children 0 to 4 years old from ELNAT,<sup>5</sup> the Half Moon Bay Region has 186 children ages 0 to 4 that qualify for subsidized care. This translates into 59% of the current need being met. There is an unmet need for 76 subsidized spaces for children 0 to 4 years old.

<sup>4</sup> Includes State Preschool, General Child Care, ASES, Early Head Start, 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.

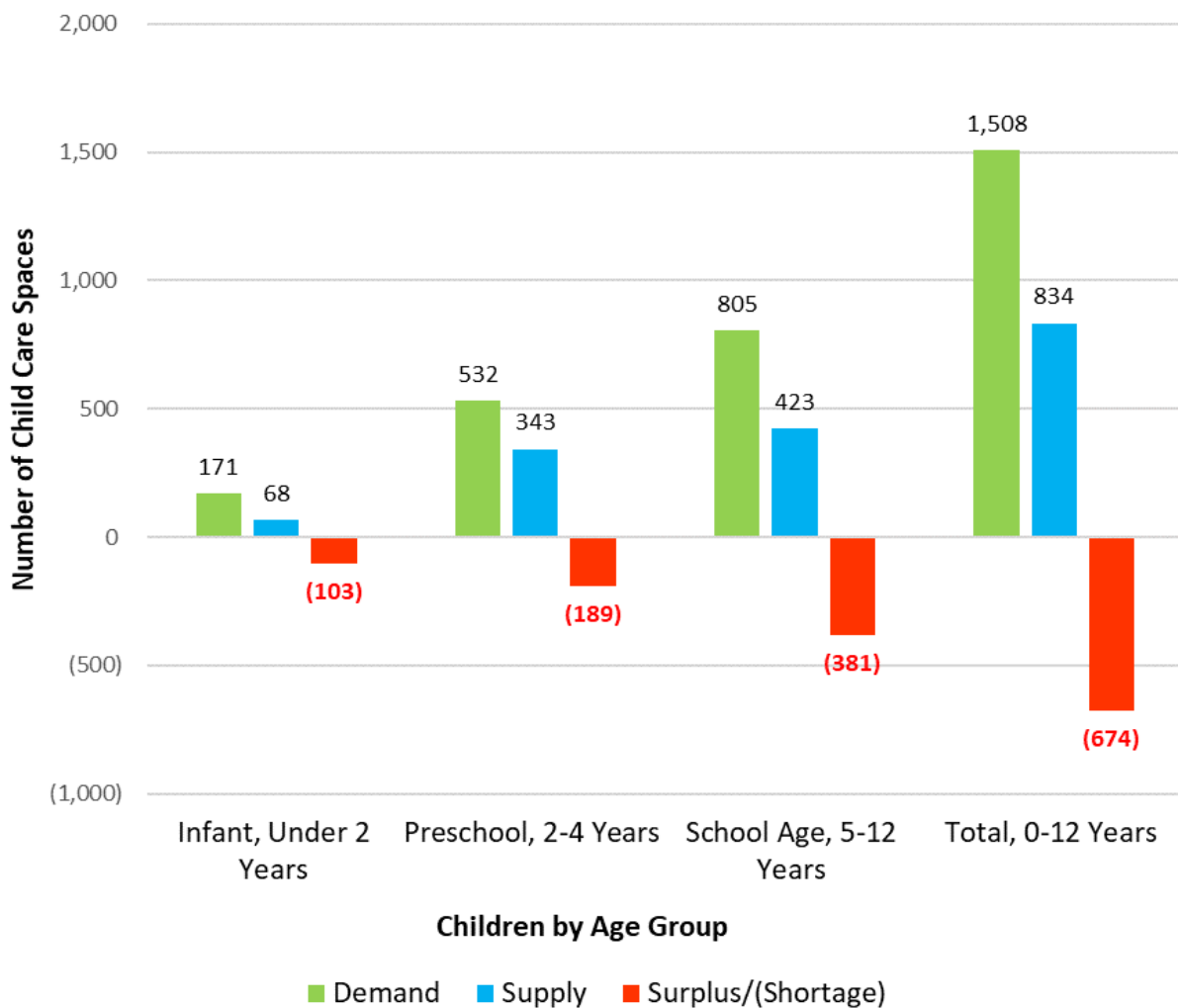
<sup>5</sup> Early Learning Needs Assessment Tool created by American Institutes for Research (AIR).

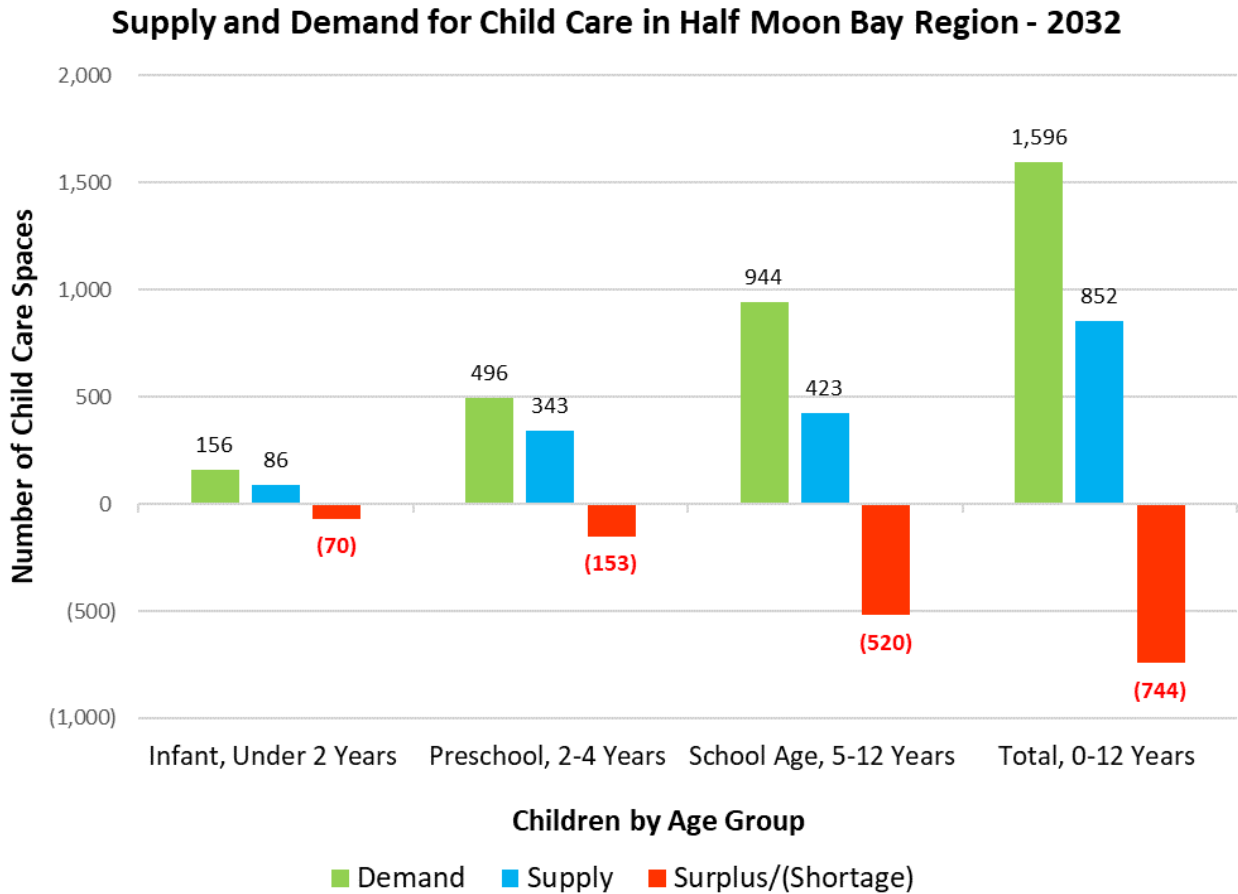
In addition, there are also 109 School Age subsidized spaces in the Half Moon Bay Region (not shown below).

Half Moon Bay Region - 2020 - Subsidized Care and Need			
Item	Infants 0-2 Years	Preschool 3-4 Years	Total 0-4 Years
Estimated Children	892	642	1,534
Eligible (Need) for Subsidized Spaces	67	119	186
Percent of Total Children	8%	19%	12%
No. of Subsidized Spaces	17	93	110
<b>Unmet Need</b>	<b>(50)</b>	<b>(26)</b>	<b>(76)</b>
Percent of Need Met	25%	78%	59%

▪ Supply and Demand Summary by Year

Supply and Demand for Child Care in Half Moon Bay Region  
 - 2022





## 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.<sup>6</sup>
- **Subsidies:** Subsidized space data and analysis is from a combination of sources including SMCOE 2022 survey results of direct state contracts, CalWORKs Stage 2 and 3, and Alternative Payment (AP) data from the California Department of Education, and CD-801A Monthly Report for October 2020,<sup>7</sup> 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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- San Mateo County Office of Education; and,
- Child Care Needs Assessment Ad Hoc Committee Members

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<sup>6</sup> It is assumed that School Age children of non-resident employees require child care near their school.

<sup>7</sup> This is the most current data available.