



*Final Report:*

# REDWOOD CITY 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*

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## REDWOOD CITY 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.

### DEMOGRAPHICS<sup>1</sup>

Redwood City	2022	2032	Net Change	% Change
<b>Total Population</b>	<b>103,683</b>	<b>114,270</b>	<b>10,587</b>	<b>10.2%</b>
Total Employees	71,480	74,009	2,529	3.5%
Children Under 2 Years Old	3,188	3,217	29	0.9%
Children 2 to 4 Years Old	4,435	4,475	40	0.9%
Children 5 to 12 Years Old	10,355	10,582	227	2.2%
<b>Total Children 0 to 12 Years Old</b>	<b>17,978</b>	<b>18,274</b>	<b>296</b>	<b>1.6%</b>
Children 0 to 12 as % of Total Population	17.3%	16.0%		-1.3%

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:** 173 total providers: 98 Family Child Care Homes (FCCHs) and 75 Child Care Centers (Center Spaces) with a total of 7,133 spaces.
- **2022 and 2032 Estimated Supply of Child Care Spaces<sup>2</sup>**

2022 Supply in Redwood City				
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply
Infants	245	356	601	8%
Preschool	490	2,085	2,575	36%
School Age	315	3,642	3,957	55%
<b>Total Supply</b>	<b>1,050</b>	<b>6,083</b>	<b>7,133</b>	<b>100%</b>
% of Supply	15%	85%	100%	

2032 Supply in Redwood City					Change 2022 to 2032	
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply	Net Change	% Change in Supply
Infants	245	458	703	9%	102	17%
Preschool	490	2,351	2,841	38%	266	10%
School Age	315	3,642	3,957	53%	-	0%
<b>Total Supply</b>	<b>1,050</b>	<b>6,451</b>	<b>7,501</b>	<b>100%</b>	<b>368</b>	<b>5%</b>
% of Supply	14%	86%	100%			

<sup>1</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>2</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 Redwood City, there are five new planned child care projects with 102 Infant and 266 Preschool spaces.
- **2022 Estimated Demand for Licensed Child Care Spaces:** Total need equals 9,512 spaces, including 8,757 spaces for residents and 755 spaces for non-resident employees working in Redwood City and commuting in from outside the County.

2022 Demand in Redwood City				
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	% of Demand
Infants	1,186	302	1,488	16%
Preschool	2,714	453	3,167	33%
School Age	4,856	-	4,856	51%
<b>Total Demand</b>	<b>8,757</b>	<b>755</b>	<b>9,512</b>	<b>100%</b>
% of Demand	92%	8%	100%	

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

2032 Demand in Redwood City					Change 2022 to 2032	
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	% of Demand	Net Change	% Change in Demand
Infants	1,126	313	1,439	14%	(49)	-3%
Preschool	2,710	469	3,179	30%	12	0%
School Age	6,004	-	6,004	57%	1,147	24%
<b>Total Demand</b>	<b>9,840</b>	<b>782</b>	<b>10,621</b>	<b>100%</b>	<b>1,110</b>	<b>12%</b>
% of Demand	93%	7%	100%			

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

Estimated Surplus or Shortage of Spaces by Year - Redwood City				
Age Group	Surplus (Shortage) - 2022	% of Demand Met - 2022	Surplus (Shortage) - 2032	% of Demand Met - 2032
Infants	(887)	40%	(736)	49%
Preschool	(592)	81%	(338)	89%
School Age	(899)	81%	(2,046)	66%
<b>Total Surplus/(Shortage)</b>	<b>(2,378)</b>	<b>75%</b>	<b>(3,120)</b>	<b>71%</b>

- **Subsidized Need and Spaces:**<sup>3</sup> According to data from SMCOE and the California Department of Education, Redwood City has 49 Infant and 517 Preschool subsidized spaces. According to 2020 data for children 0 to 4 years old from ELNAT,<sup>4</sup> Redwood City has 1,669 children ages 0 to 4 that qualify for subsidized care. This translates into 34% of the current need being met. There is an unmet need for 1,103 subsidized spaces for children 0 to 4 years old. The City has an additional 744 School Age center-based subsidized spaces (not shown below).

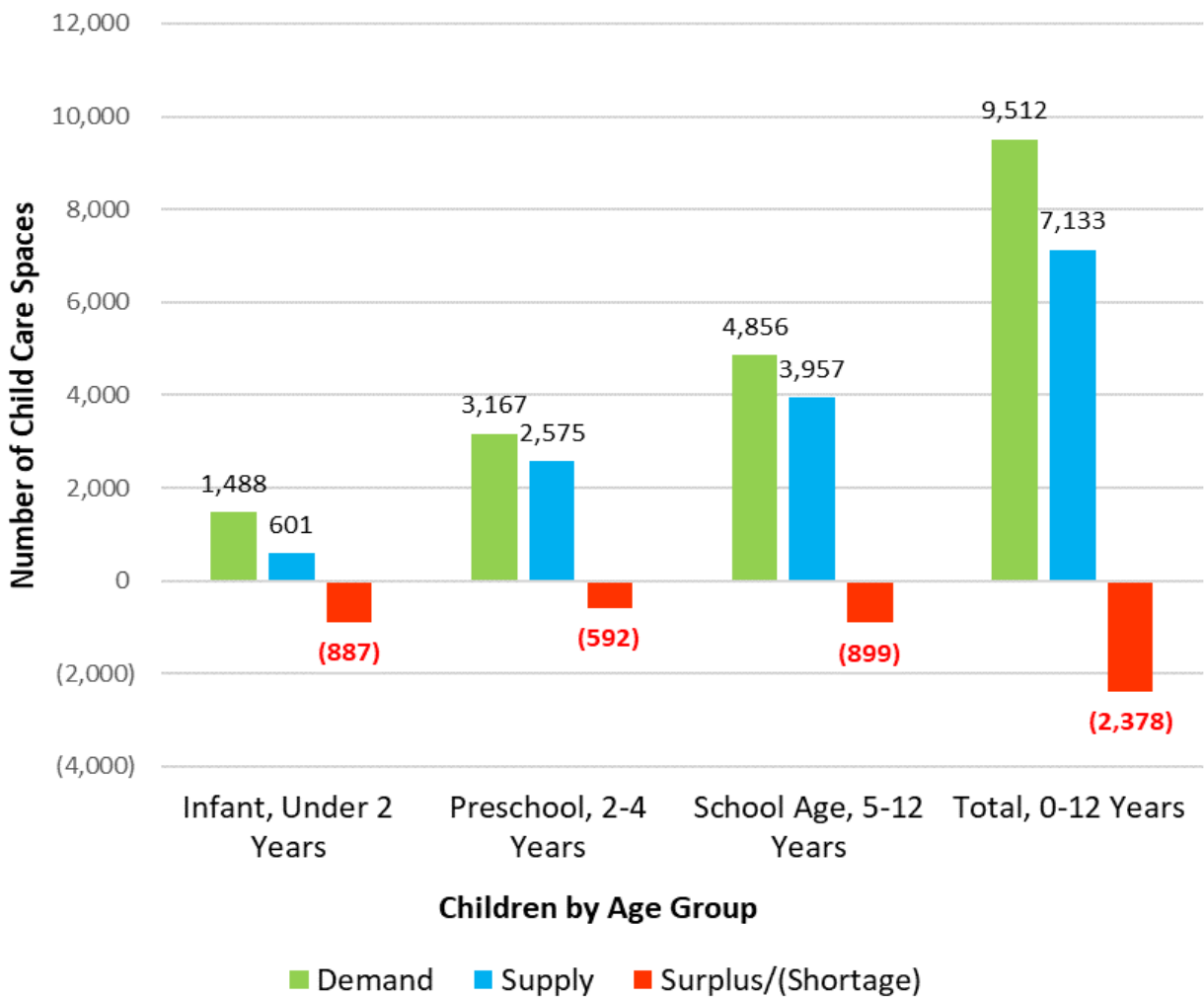
<sup>3</sup> Includes State Preschool, General Child Care, ASES, Early Head Start, and Head Start, CalWORKs – Stage 2 and 3, and Alternative Payment programs. Age groups for subsidized care are Infants, birth to 2 years old, and Preschool, 3 and 4 years old.

<sup>4</sup> Early Learning Needs Assessment Tool created by American Institutes for Research (AIR).

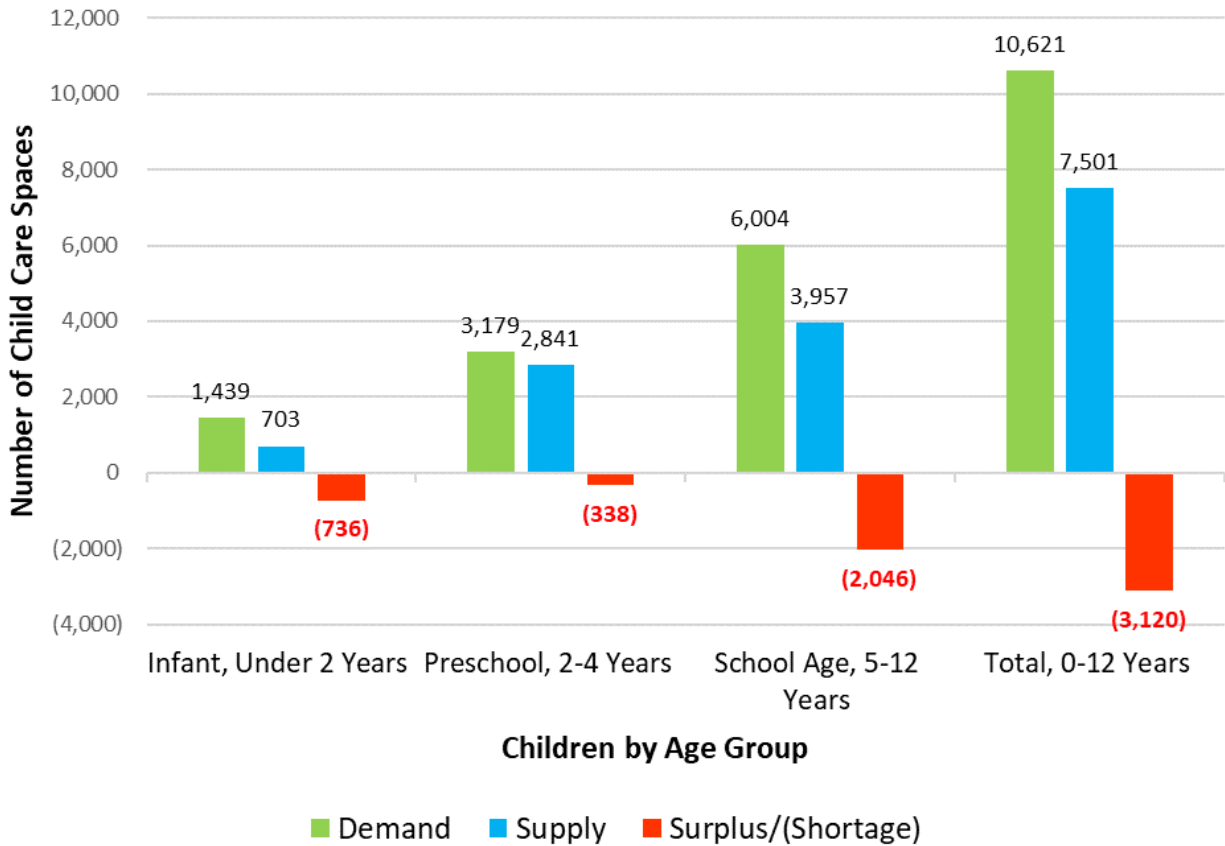
Redwood City - 2020 - Subsidized Care and Need			
Item	Infants 0-2 Years	Preschool 3-4 Years	Total 0-4 Years
Estimated Children	3,997	2,722	6,719
Eligible (Need) for Subsidized Spaces	898	771	1,669
Percent of Total Children	22%	28%	25%
No. of Subsidized Spaces	49	517	566
<b>Unmet Need</b>	<b>(849)</b>	<b>(254)</b>	<b>(1,103)</b>
Percent of Need Met	5%	67%	34%

Supply and Demand Summary by Year

Supply and Demand for Child Care in Redwood City -  
 2022



### Supply and Demand for Child Care in Redwood City - 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.<sup>5</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>6</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>5</sup> It is assumed that School Age children of non-resident employees require child care near their school.

<sup>6</sup> This is the most current data available.