



Final Report:

CITY OF SAN MATEO 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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CITY OF SAN MATEO 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	2022	2032	Net Change	% Change
Total Population	115,923	129,438	13,515	11.7%
Total Employees	63,348	67,406	4,058	6.4%
Children Under 2 Years Old	2,365	2,413	48	2.0%
Children 2 to 4 Years Old	4,281	4,369	88	2.0%
Children 5 to 12 Years Old	8,047	8,301	254	3.2%
Total Children 0 to 12 Years Old	14,693	15,083	390	2.7%
Children 0 to 12 as % of Total Population	12.7%	11.7%		-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:** 196 total providers: 113 Family Child Care Homes (FCCH Spaces) and 83 Child Care Centers (Center Spaces) with a total of 5,419 spaces.
- **2022 and 2032 Estimated Supply of Child Care Spaces²**

2022 Supply in San Mateo				
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply
Infants	300	136	436	8%
Preschool	600	2,670	3,270	60%
School Age	398	1,315	1,713	32%
Total Supply	1,298	4,121	5,419	100%
% of Supply	24%	76%	100%	

2032 Supply in San Mateo					Change 2022 to 2032	
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply	Net Change	% Change in Supply
Infants	306	166	472	8%	36	8%
Preschool	606	2,845	3,451	61%	181	6%
School Age	398	1,315	1,713	30%	-	0%
Total Supply	1,310	4,326	5,636	100%	217	4%
% of Supply	23%	77%	100%			

¹ 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.

² 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 San Mateo, there are seven new planned child care projects, with a total of 36 Infant and 181 Preschool spaces.
- **2022 Estimated Demand for Licensed Child Care Spaces:** Total need equals 7,926 spaces, including 7,274 spaces for residents and 652 spaces for non-resident employees working in San Mateo and commuting in from outside the County.

2022 Demand in San Mateo				
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	% of Demand
Infants	880	261	1,141	14%
Preschool	2,620	391	3,011	38%
School Age	3,774	-	3,774	48%
Total Demand	7,274	652	7,926	100%
% of Demand	92%	8%	100%	

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

2032 Demand in San Mateo					Change 2022 to 2032	
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	% of Demand	Net Change	% Change in Demand
Infants	845	277	1,122	13%	(18)	-2%
Preschool	2,602	416	3,018	34%	7	0%
School Age	4,799	-	4,799	54%	1,025	27%
Total Demand	8,246	694	8,940	100%	1,014	13%
% of Demand	92%	8%	100%			

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

Estimated Surplus or Shortage of Spaces by Year - San Mateo				
Age Group	Surplus (Shortage) - 2022	% of Demand Met - 2022	Surplus (Shortage) - 2032	% of Demand Met - 2032
Infants	(705)	38%	(650)	42%
Preschool	259	109%	433	114%
School Age	(2,061)	45%	(3,086)	36%
Total Surplus/(Shortage)	(2,507)	68%	(3,304)	63%

- **Subsidized Need and Spaces:**³ According to data from SMCOE and the California Department of Education, San Mateo has 97 Infant and 346 Preschool subsidized spaces. According to 2020 data for children 0 to 4 years old from ELNAT,⁴ San Mateo has 1,051 children ages 0 to 4 that qualify for subsidized care. This translates into 42% of the current need being met. There is an unmet need for 608 subsidized spaces for children 0 to 4 years old. The City has an additional 251 School Age center-based subsidized spaces (not shown below).

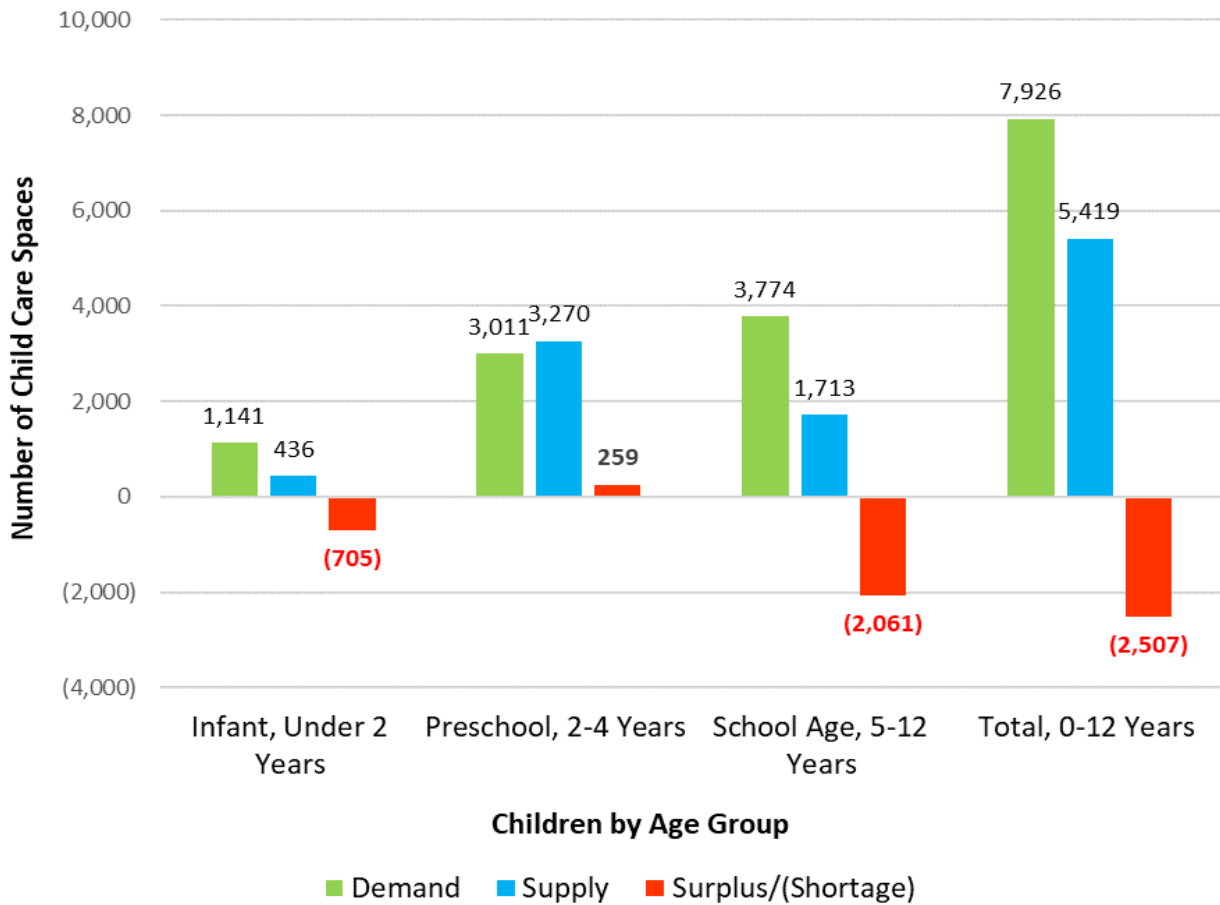
³ Includes State Preschool, General Child Care, ASES, Early Head Start, and Head Start, CalWORKs – Stage 2 and 3, and Alternative Payment programs. Age groups for subsidized care are Infants, birth to 2 years old, and Preschool, 3 and 4 years old.

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

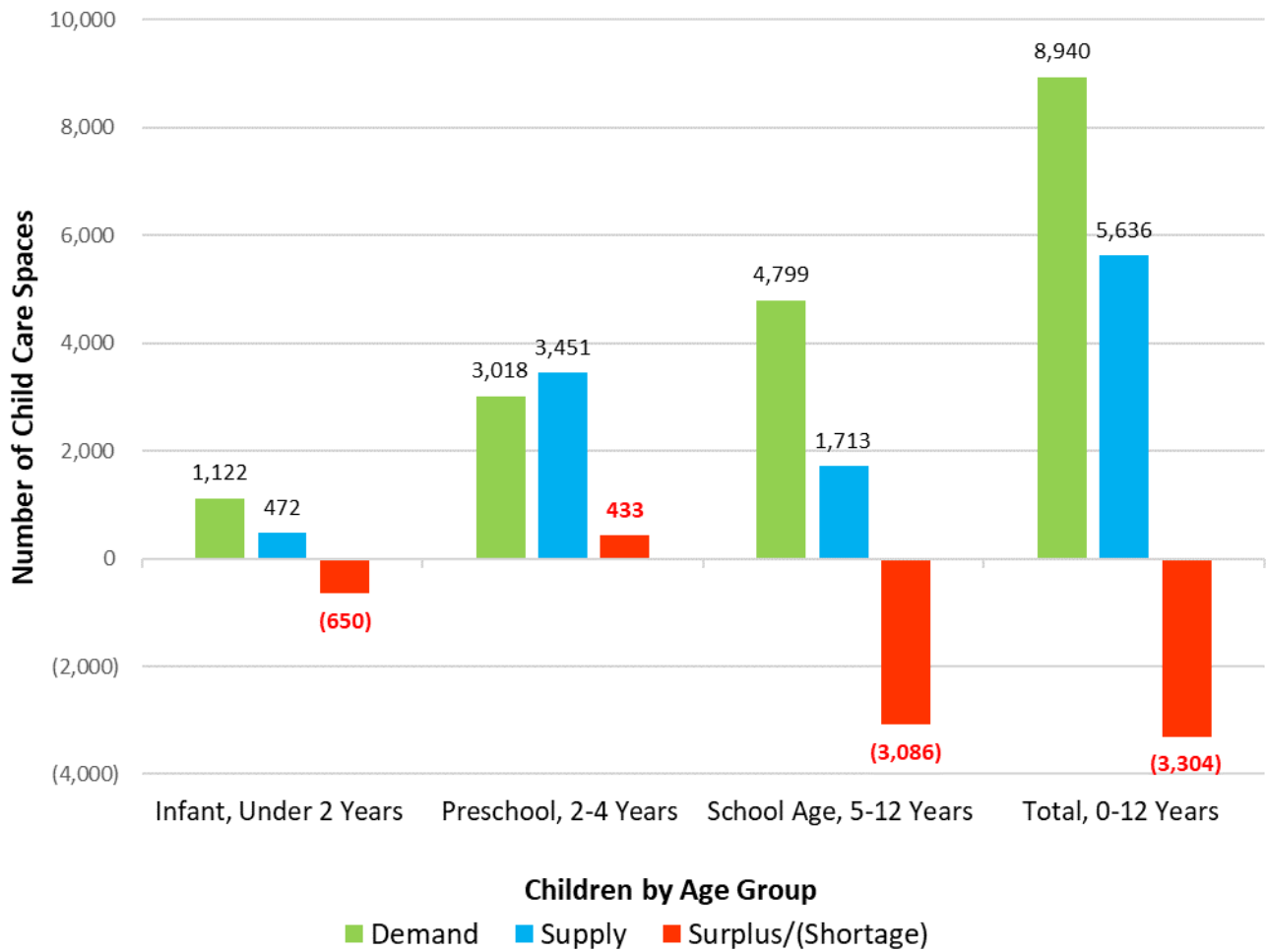
San Mateo - 2020 - Subsidized Care and Need			
Item	Infants 0-2 Years	Preschool 3-4 Years	Total 0-4 Years
Estimated Children	3,731	2,492	6,223
Eligible (Need) for Subsidized Spaces	543	508	1,051
Percent of Total Children	15%	20%	17%
No. of Subsidized Spaces	97	346	443
Unmet Need	(446)	(162)	(608)
Percent of Need Met	18%	68%	42%

▪ Supply and Demand Summary by Year

Supply and Demand for Child Care in San Mateo - 2022



Supply and Demand for Child Care in San Mateo - 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.⁵
- **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 2020,⁶ 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

Funding for this study was provided by:



⁵ It is assumed that School Age children of non-resident employees require child care near their school.

⁶ This is the most current data available.