



Final Report:

SOUTH COAST REGION PROFILE

(Includes La Honda, Loma Mar, Pescadero and San Gregorio)

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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SOUTH COAST REGION CHILD CARE SUMMARY¹

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.

DEMOGRAPHICS²

South Coast Region	2022	2032	Net Change	% Change
Total Population	2,069	2,131	62	3.0%
Total Employees	-	-	-	-
Children Under 2 Years Old	21	20	(1)	-3.7%
Children 2 to 4 Years Old	44	43	(2)	-3.7%
Children 5 to 12 Years Old	103	100	(2)	-2.2%
Total Children 0 to 12 Years Old	168	163	(5)	-2.8%
Children 0 to 12 as % of Total Population	8.1%	7.7%		-0.5%

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:** Three total providers: 0 Family Child Care Homes (FCCH Spaces) and three Child Care Centers (Center Spaces) with a total of 137 spaces.
- **2022 and 2032 Estimated Supply of Child Care Spaces³**

2022 Supply in South Coast Region				
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply
Infants	-	-	-	0%
Preschool	-	45	45	0%
School Age	-	92	92	100%
Total Supply	-	137	137	100%
% of Supply	0%	100%	100%	

2032 Supply in South Coast Region					Change 2022 to 2032	
Age Group	FCCH Spaces	Center Spaces	Total Spaces	% of Supply	Net Change	% Change in Supply
Infants	-	12	12	8%	12	100%
Preschool	-	45	45	30%	-	0%
School Age	-	92	92	62%	-	0%
Total Supply	-	149	149	100%	12	9%
% of Supply	0%	100%	100%			

¹ The South Coast Region includes La Honda, Loma Mar, Pescadero and San Gregorio.

² 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.

³ 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 South Coast Region, Pescadero has one new planned child care project, with 12 Infant spaces.
- **2022 Estimated Demand for Licensed Child Care Spaces:** Total need equals 83 spaces, including 83 spaces for residents and 0 spaces for non-resident employees working in the South Coast Region and commuting in from outside the County.

2022 Demand in South Coast Region				
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	% of Demand
Infants	8	-	8	9%
Preschool	27	-	27	33%
School Age	48	-	48	58%
Total Demand	83	-	83	100%
% of Demand	100%	0%	100%	

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

2032 Demand in South Coast Region					Change 2022 to 2032	
Age Group	Resident Demand	Employee Demand	Total Spaces Needed	% of Demand	Net Change	% Change in Demand
Infants	7	-	7	8%	(1)	-9%
Preschool	25	-	25	28%	(2)	-6%
School Age	57	-	57	64%	9	19%
Total Demand	90	-	90	100%	7	8%
% of Demand	100%	0%	100%			

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

Estimated Surplus or Shortage of Spaces by Year - South Coast Region				
Age Group	Surplus (Shortage) - 2022	% of Demand Met - 2022	Surplus (Shortage) - 2032	% of Demand Met - 2032
Infants	(8)	0%	5	171%
Preschool	18	165%	20	177%
School Age	44	191%	35	161%
Total Surplus/(Shortage)	54	165%	59	166%

- **Subsidized Need and Spaces:**⁴ According to data from SMCOE and the California Department of Education, the South Coast Region has 0 Infant and 17 Preschool subsidized spaces. According to 2020 data for children 0 to 4 years old from ELNAT,⁵ the South Coast Region has 30 children ages 0 to 4 that qualify for subsidized care. This translates into 57% of the current need being met. There is an unmet need for 13 subsidized spaces for children 0 to 4 years old.

⁴ 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.

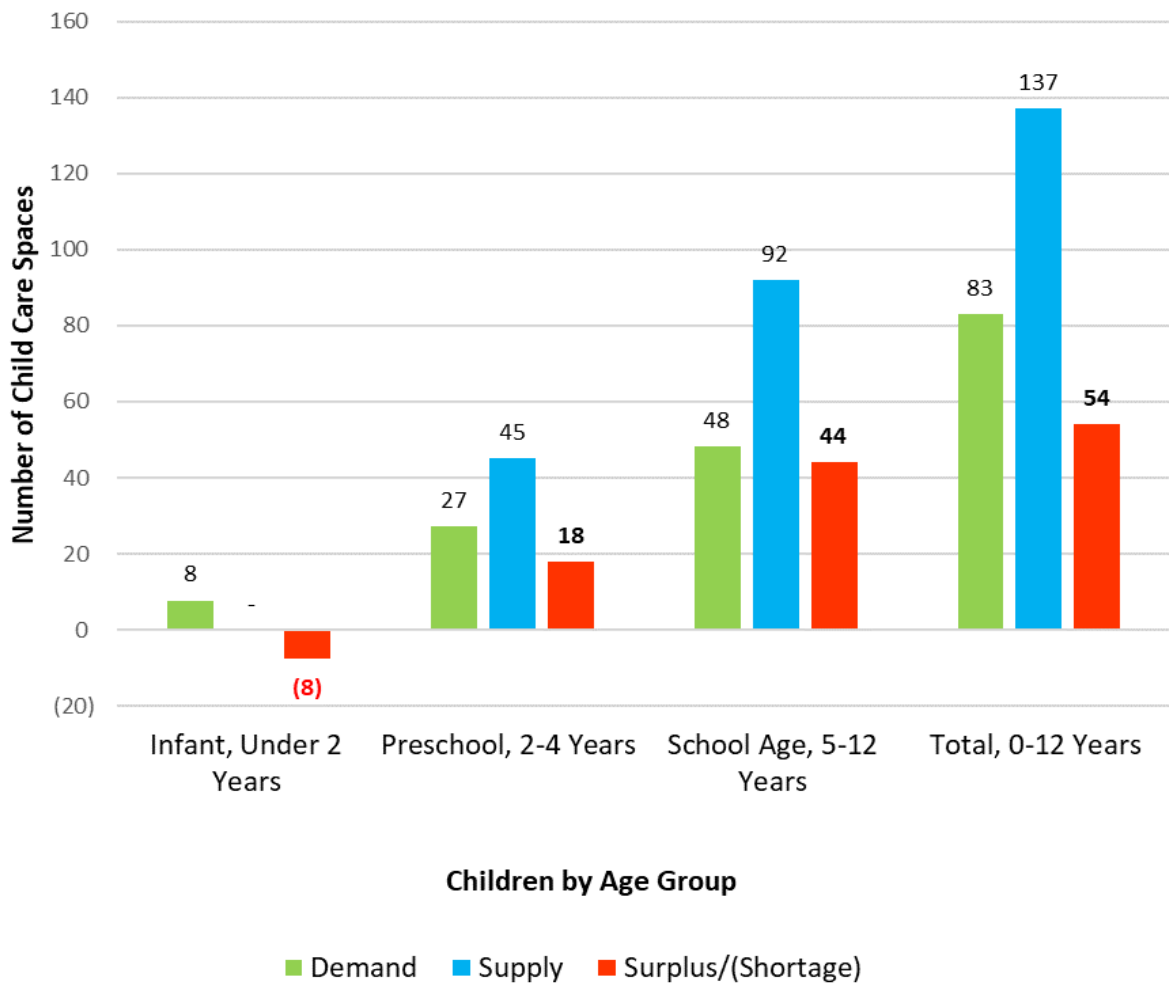
⁵ Early Learning Needs Assessment Tool created by American Institutes for Research (AIR).

The South Coast Region has an additional 92 School Age center-based subsidized spaces (not shown below).

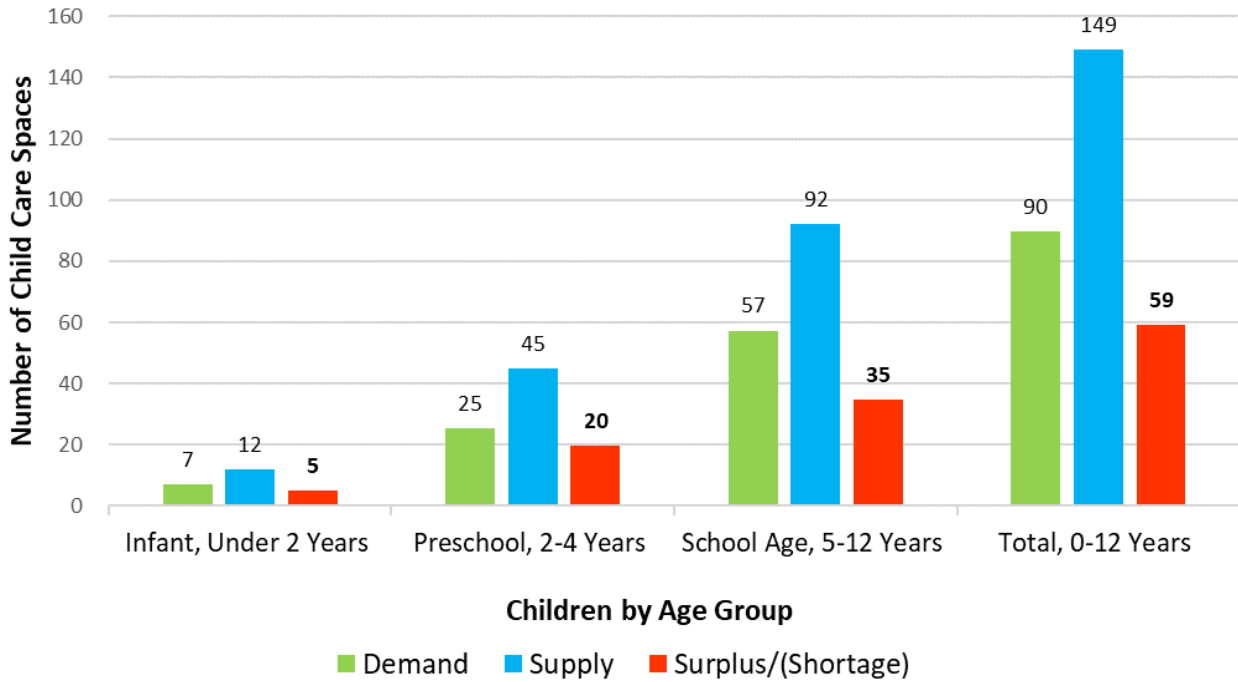
South Coast Region - 2020 - Subsidized Care and Need			
Item	Infants 0-2 Years	Preschool 3-4 Years	Total 0-4 Years
Estimated Children	128	94	222
Eligible (Need) for Subsidized Spaces	10	20	30
Percent of Total Children	8%	21%	14%
No. of Subsidized Spaces	-	17	17
Unmet Need	(10)	(3)	(13)
Percent of Need Met	0%	85%	57%

▪ Supply and Demand Summary by Year

Supply and Demand for Child Care in South Coast Region -
 2022



Supply and Demand for Child Care in South Coast Region - 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	2032	Difference
	Demand	Demand	
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.⁶
- **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 2020,⁷ 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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⁶ It is assumed that School Age children of non-resident employees require child care near their school.

⁷ This is the most current data available.