

APPENDIX B:

SUPPLY AND DEMAND TABLES BY CITY/AREA AND TOTAL COUNTY- 2032

Appendix B

Future Conditions - 2032

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Table B-1
Future Child Care Demand and Supply in 2032, Countywide
San Mateo County Child Care Needs Assessment - 2022

COUNTRYWIDE	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	17,899	9,987	9,542	7,865	27,394	63,833	109,126
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	60.9%	54.0%	54.2%
Resident Children Needing Licensed Care		6,265	6,871	6,565	3,247	16,683	36,169	59,116
Children from Non-Resident Employees	(4)							
Employees from Outside County		174,040						
Amount that Need Licensed Care		3%	<u>2,088</u>			<u>3,133</u>	<u>0</u>	<u>5,221</u>
Total Demand for Child Care Spaces			8,353			19,815	36,169	64,337
% Distribution			13%			31%	56%	100%
FUTURE SUPPLY		(5) Providers	Child Care Spaces					
Family Child Care Home Supply	(6)	530	1,349			2,684	1,763	5,796
Child Care Center Supply		<u>506</u>	<u>1,813</u>			<u>16,881</u>	<u>17,919</u>	<u>36,613</u>
Future Child Care Supply		1,036	3,162			19,565	19,682	42,409
% Distribution			7%			46%	46%	100%
FUTURE SURPLUS/(SHORTAGE)	(7)		(5,191)			(250)	(16,487)	(21,928)
% Distribution			24%			1%	75%	100%
Percentage of Demand Met by Existing Facilities/Spaces			38%			99%	54%	66%

Note: All footnote references can be found in Appendix B Table B at the end of this file. Slight differences in sums are due to percentage rounding.
of San Mateo County; Brion Economics, Inc.

Table B-2
Future Child Care Demand and Supply in 2032 in Atherton
San Mateo County Child Care Needs Assessment - 2022

ATHERTON	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	102	55	37	40	132	563	797
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average Resident Children Needing Licensed Care	(3)	35.0%	68.8%	68.8%	68.8%	60.5%	54.0%	53.7%
		36	38	25	16	80	313	428
Children from Non-Resident Employees	(4)							
Employees from Outside County		997						
Amount that Need Licensed Care		3%	<u>12</u>			<u>18</u>	<u>0</u>	<u>30</u>
Total Demand for Child Care Spaces			48			98	313	458
% Distribution			10%			21%	68%	100%
FUTURE SUPPLY		Child Care Spaces						
Family Child Care Home Supply	(5) Providers							
Child Care Center Supply	(6)	1	3			6	5	14
		<u>8</u>	<u>19</u>			<u>358</u>	<u>326</u>	<u>703</u>
Future Child Care Supply		9	22			364	331	717
% Distribution			3%			51%	46%	100%
FUTURE SURPLUS/(SHORTAGE)	(7)		(26)			266	18	259
% Distribution			-10%			103%	7%	100%
Percentage of Demand Met by Existing Facilities/Spaces			46%			373%	106%	156%

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Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

**Table B-3
Future Child Care Demand and Supply in 2032 in Belmont
San Mateo County Child Care Needs Assessment - 2022**

BELMONT	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	580	233	415	276	924	2,007	3,511
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	60.6%	54.0%	54.3%
Resident Children Needing Licensed Care		203	160	286	114	560	1,143	1,906
Children from Non-Resident Employees	(4)							
Employees from Outside County		3,685						
Amount that Need Licensed Care		3%	<u>44</u>			<u>66</u>	<u>0</u>	<u>111</u>
Total Demand for Child Care Spaces			247			626	1,143	2,017
% Distribution			12%			31%	57%	100%
FUTURE SUPPLY		(5) Providers	Child Care Spaces					
Family Child Care Home Supply	(6)	11	28			56	40	124
Child Care Center Supply		<u>21</u>	<u>78</u>			<u>610</u>	<u>1,075</u>	<u>1,763</u>
Current Child Care Supply		32	106			666	1,115	1,887
% Distribution			6%			35%	59%	100%
FUTURE SURPLUS/(SHORTAGE)	(7)		(141)			40	(28)	(130)
% Distribution			109%			-31%	22%	100%
Percentage of Demand Met by Existing Facilities/Spaces			43%			106%	98%	94%

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Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

Table B-4
Future Child Care Demand and Supply in 2032 in Brisbane
San Mateo County Child Care Needs Assessment - 2022

BRISBANE	Amount or Rate	Child Care as of 2032							
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years	
FUTURE DEMAND		Child Care Demand							
Estimated Total Children	(1)	255	221	261	95	577	969	1,801	
Adjustment for 4 years old in TK	(2)				60%		40.0%		
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	64.3%	54.0%	55.7%	
Resident Children Needing Licensed Care		89	152	180	39	371	544	1,004	
Children from Non-Resident Employees	(4)								
Employees from Outside County		7,761							
Amount that Need Licensed Care		3%	<u>93</u>			<u>140</u>	<u>0</u>	<u>233</u>	
Total Demand for Child Care Spaces			182			511	544	1,237	
% Distribution			15%			41%	44%	100%	
FUTURE SUPPLY		(5) Providers	Child Care Spaces						
Family Child Care Home Supply	(6)	1	3			6	5	14	
Child Care Center Supply		<u>1</u>	<u>0</u>			<u>24</u>	<u>65</u>	<u>89</u>	
Current Child Care Supply		2	3			30	70	103	
% Distribution			3%			29%	68%	100%	
FUTURE SURPLUS/(SHORTAGE)	(7)		(179)			(481)	(474)	(1,134)	
% Distribution			16%			42%	42%	100%	
Percentage of Demand Met by Existing Facilities/Spaces			2%			6%	13%	8%	

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Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

**Table B-5
Future Child Care Demand and Supply in 2032 in Burlingame
San Mateo County Child Care Needs Assessment - 2022**

BURLINGAME	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	661	441	238	348	1,027	2,417	4,105
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	59.5%	54.0%	54.1%
Resident Children Needing Licensed Care		231	303	164	143	611	1,380	2,222
Children from Non-Resident Employees	(4)							
Employees from Outside County		13,778						
Amount that Need Licensed Care		3%	<u>165</u>			<u>248</u>	<u>0</u>	<u>413</u>
Total Demand for Child Care Spaces			397			859	1,380	2,636
% Distribution			15%			33%	52%	100%
FUTURE SUPPLY		Child Care Spaces						
Family Child Care Home Supply	(5) (6)	18	46			92	58	196
Child Care Center Supply		<u>23</u>	<u>40</u>			<u>794</u>	<u>779</u>	<u>1,613</u>
Current Child Care Supply		41	86			886	837	1,809
% Distribution			5%			49%	46%	100%
FUTURE SURPLUS/(SHORTAGE)	(7)		(311)			27	(543)	(827)
% Distribution			38%			-3%	66%	100%
Percentage of Demand Met by Existing Facilities/Spaces			22%			103%	61%	69%

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Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

**Table B-6
Future Child Care Demand and Supply in 2032 in Daly City/Colma
San Mateo County Child Care Needs Assessment - 2022**

DALY CITY/COLMA	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	2,967	863	950	317	2,130	7,214	12,311
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	64.7%	54.0%	51.8%
Resident Children Needing Licensed Care		1,038	594	653	131	1,378	3,964	6,381
Children from Non-Resident Employees	(4)							
Employees from Outside County		12,467						
Amount that Need Licensed Care		3%	<u>150</u>			<u>224</u>	<u>0</u>	<u>374</u>
Total Demand for Child Care Spaces			1,188			1,603	3,964	6,755
% Distribution			18%			24%	59%	100%
FUTURE SUPPLY		Child Care Spaces						
Family Child Care Home Supply	(6)	64	147			292	181	620
Child Care Center Supply		<u>43</u>	<u>101</u>			<u>1,194</u>	<u>2,291</u>	<u>3,586</u>
Future Child Care Supply		107	248			1,486	2,472	4,206
% Distribution			6%			35%	59%	100%
FUTURE SURPLUS/(SHORTAGE)	(7)		(940)			(117)	(1,492)	(2,549)
% Distribution			37%			5%	59%	100%
Percentage of Demand Met by Existing Facilities/Spaces			21%			93%	62%	62%

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Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

**Table B-7
Future Child Care Demand and Supply in 2032 in East Palo Alto
San Mateo County Child Care Needs Assessment - 2022**

EAST PALO ALTO	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	1,074	557	446	472	1,475	3,539	6,088
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	60.0%	54.0%	53.8%
Resident Children Needing Licensed Care		376	383	307	195	884	2,013	3,274
Children from Non-Resident Employees	(4)							
Children from Non-Resident Employees		3,451						
Amount that Need Licensed Care		3%	<u>41</u>			<u>62</u>	<u>0</u>	<u>104</u>
Total Demand for Child Care Spaces			417			947	2,013	3,377
% Distribution			12%			28%	60%	100%
FUTURE SUPPLY		(5) Providers	Child Care Spaces					
Family Child Care Home Supply	(6)	28	75			150	113	338
Child Care Center Supply		<u>18</u>	<u>0</u>			<u>690</u>	<u>1,644</u>	<u>2,334</u>
Future Child Care Supply		46	75			840	1,757	2,672
% Distribution			3%			31%	66%	100%
FUTURE SURPLUS/(SHORTAGE)	(7)		(342)			(107)	(256)	(705)
% Distribution			49%			15%	36%	100%
Percentage of Demand Met by Existing Facilities/Spaces			18%			89%	87%	79%

Note: All footnote references can be found in Appendix B Table B at the end of this file. Slight differences in sums are due to percentage rounding.

Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

Table B-8
Future Child Care Demand and Supply in 2032 in Foster City
San Mateo County Child Care Needs Assessment - 2022

FOSTER CITY	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	612	502	363	431	1,296	2,799	4,707
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	59.7%	54.0%	55.1%
Resident Children Needing Licensed Care		214	345	250	178	773	1,604	2,592
Children from Non-Resident Employees	(4)							
Employees from Outside County		9,352						
Amount that Need Licensed Care		3%	<u>112</u>			<u>168</u>	<u>0</u>	<u>281</u>
Total Demand for Child Care Spaces			326			941	1,604	2,872
% Distribution			11%			33%	56%	100%
FUTURE SUPPLY		Child Care Spaces						
Family Child Care Home Supply	(5) Providers	(6) 25	64			128	88	280
Child Care Center Supply		<u>21</u>	<u>132</u>			<u>959</u>	<u>880</u>	<u>1,971</u>
Current Child Care Supply		46	196			1,087	968	2,251
% Distribution			9%			48%	43%	100%
FUTURE SURPLUS/(SHORTAGE)	(7)		(130)			146	(636)	(621)
% Distribution			21%			-23%	102%	100%
Percentage of Demand Met by Existing Facilities/Spaces			60%			115%	60%	78%

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Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

**Table B-9
Future Child Care Demand and Supply in 2032 in Half Moon Bay Region
San Mateo County Child Care Needs Assessment - 2022**

HALF MOON BAY REGION	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	355	291	210	250	751	1,647	2,753
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	59.6%	54.0%	55.1%
Resident Children Needing Licensed Care		124	200	144	103	448	944	1,516
Children from Non-Resident Employees	(4)							
Employees from Outside County		2,683						
Amount that Need Licensed Care		3%	<u>32</u>			<u>48</u>	<u>0</u>	<u>80</u>
Total Demand for Child Care Spaces			156			496	944	1,596
% Distribution			10%			31%	59%	100%
FUTURE SUPPLY		Child Care Spaces						
Family Child Care Home Supply	(5) Providers							
Child Care Center Supply	(6)	14	32			64	40	136
Future Child Care Supply		<u>17</u>	<u>54</u>			<u>279</u>	<u>383</u>	<u>716</u>
% Distribution		31	86			343	423	852
			10%			40%	50%	100%
FUTURE SURPLUS/(SHORTAGE)	(7)		(70)			(153)	(520)	(744)
% Distribution			9%			21%	70%	100%
Percentage of Demand Met by Existing Facilities/Spaces			55%			69%	45%	53%

Note: All footnote references can be found in Appendix B Table B at the end of this file. Slight differences in sums are due to percentage rounding.
Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

Table B-10
Future Child Care Demand and Supply in 2032 in Hillsborough
San Mateo County Child Care Needs Assessment - 2022

HILLSBOROUGH	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	150	100	54	79	234	1,125	1,509
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	59.5%	54.0%	54.1%
Resident Children Needing Licensed Care		53	69	37	33	139	624	816
Children from Non-Resident Employees	(4)							
Employees from Outside County		994						
Amount that Need Licensed Care		3%	<u>12</u>			<u>18</u>	<u>0</u>	<u>30</u>
Total Demand for Child Care Spaces			65			157	624	846
% Distribution			8%			19%	74%	100%
FUTURE SUPPLY		(5) Providers	Child Care Spaces					
Family Child Care Home Supply	(6)	1	3			6	5	14
Child Care Center Supply		<u>4</u>	<u>—</u>			<u>85</u>	<u>60</u>	<u>145</u>
Current Child Care Supply		5	3			91	65	159
% Distribution			2%			57%	41%	100%
FUTURE SURPLUS/(SHORTAGE)	(7)		(62)			(66)	(559)	(687)
% Distribution			9%			10%	81%	100%
Percentage of Demand Met by Existing Facilities/Spaces			5%			58%	10%	19%

Note: All footnote references can be found in Appendix B Table B at the end of this file. Slight differences in sums are due to percentage rounding.

Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

Table B-11
Future Child Care Demand and Supply in 2032 in Menlo Park
San Mateo County Child Care Needs Assessment - 2022

MENLO PARK	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	1,666	892	641	1,292	2,825	5,950	10,440
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	56.2%	54.0%	54.2%
Resident Children Needing Licensed Care		583	614	441	533	1,588	3,492	5,663
Children from Non-Resident Employees	(4)							
Employees from Outside County		20,308						
Amount that Need Licensed Care		3%	<u>244</u>			<u>366</u>	<u>0</u>	<u>609</u>
Total Demand for Child Care Spaces			827			1,954	3,492	6,272
% Distribution			13%			31%	56%	100%
FUTURE SUPPLY		(5) Providers	Child Care Spaces					
Family Child Care Home Supply	(6)	22	57			114	75	246
Child Care Center Supply		<u>46</u>	<u>135</u>			<u>1,613</u>	<u>1,156</u>	<u>2,904</u>
Future Child Care Supply		68	192			1,727	1,231	3,150
% Distribution			6%			55%	39%	100%
FUTURE SURPLUS/(SHORTAGE)	(7)		(635)			(227)	(2,261)	(3,122)
% Distribution			20%			7%	72%	100%
Percentage of Demand Met by Existing Facilities/Spaces			23%			88%	35%	50%

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Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

Table B-12
Future Child Care Demand and Supply in 2032 in Millbrae
San Mateo County Child Care Needs Assessment - 2022

MILLBRAE	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	403	269	145	212	627	1,589	2,619
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	59.5%	54.0%	54.1%
Resident Children Needing Licensed Care		141	185	100	87	373	904	1,418
Children from Non-Resident Employees	(4)							
Employees from Outside County	(6)	3,142						
Amount that Need Licensed Care		3%	<u>38</u>			<u>57</u>	<u>0</u>	<u>94</u>
Total Demand for Child Care Spaces			179			429	904	1,512
% Distribution			12%			28%	60%	100%
FUTURE SUPPLY	(7)	Providers	Child Care Spaces					
Family Child Care Home Supply		11	29			58	35	122
Child Care Center Supply		<u>13</u>	<u>0</u>			<u>304</u>	<u>405</u>	<u>709</u>
Current Child Care Supply		24	29			362	440	831
% Distribution			3%			44%	53%	100%
FUTURE SURPLUS/(SHORTAGE)	(6)		(150)			(67)	(464)	(681)
% Distribution			22%			10%	68%	100%
Percentage of Demand Met by Existing Facilities/Spaces			16%			84%	49%	55%

Note: All footnote references can be found in Appendix B Table B at the end of this file. Slight differences in sums are due to percentage rounding.
Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

Table B-13
Future Child Care Demand and Supply in 2032 in Pacifica
San Mateo County Child Care Needs Assessment - 2022

PACIFICA	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	722	407	444	146	997	2,672	4,391
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	64.8%	54.0%	54.0%
Resident Children Needing Licensed Care		253	280	305	60	646	1,475	2,373
Children from Non-Resident Employees	(4)							
Employees from Outside County		2,866						
Amount that Need Licensed Care		3%	<u>34</u>			<u>52</u>	<u>0</u>	<u>86</u>
Total Demand for Child Care Spaces			287			698	1,475	2,459
% Distribution			12%			28%	60%	100%
FUTURE SUPPLY		(5) Providers	Child Care Spaces					
Family Child Care Home Supply	(6)	23	59			115	70	244
Child Care Center Supply		<u>20</u>	<u>37</u>			<u>629</u>	<u>734</u>	<u>1,400</u>
Future Child Care Supply		43	96			744	804	1,644
% Distribution			6%			45%	49%	100%
FUTURE SURPLUS/(SHORTAGE)	(7)		(191)			46	(671)	(815)
% Distribution			23%			-6%	82%	100%
Percentage of Demand Met by Existing Facilities/Spaces			33%			107%	55%	67%

Note: All footnote references can be found in Appendix B Table B at the end of this file. Slight differences in sums are due to percentage rounding.

Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

Table B-14
Future Child Care Demand and Supply in 2032 in Portola Valley
San Mateo County Child Care Needs Assessment - 2022

PORTOLA VALLEY	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	60	32	22	23	78	371	509
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	60.5%	54.0%	53.7%
Resident Children Needing Licensed Care		21	22	15	10	47	205	274
Children from Non-Resident Employees								
Employees from Outside County	(4)	906						
Amount that Need Licensed Care		3%	<u>11</u>			<u>16</u>	<u>0</u>	<u>27</u>
Total Demand for Child Care Spaces			32			63	205	301
% Distribution			11%			21%	68%	100%
FUTURE SUPPLY		Child Care Spaces						
Family Child Care Home Supply	(5) Providers							
Child Care Center Supply	(6)	0	0			0	0	0
Future Child Care Supply		<u>5</u>	<u>0</u>			<u>183</u>	<u>129</u>	<u>312</u>
% Distribution			0%			59%	41%	100%
FUTURE SURPLUS/(SHORTAGE)	(7)		(32)			120	(76)	11
% Distribution			-283%			1058%	-675%	100%
Percentage of Demand Met by Existing Facilities/Spaces			0%			289%	63%	104%

Note: All footnote references can be found in Appendix B Table B at the end of this file. Slight differences in sums are due to percentage rounding.

Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

Table B-15
Future Child Care Demand and Supply in 2032 in Redwood City
San Mateo County Child Care Needs Assessment - 2022

REDWOOD CITY	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	3,217	1,408	1,727	1,340	4,475	10,582	18,274
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	60.6%	54.0%	53.8%
Resident Children Needing Licensed Care		1,126	969	1,188	553	2,710	6,004	9,840
Children from Non-Resident Employees	(4)							
Employees from Outside County		26,066						
Amount that Need Licensed Care	3%	<u>313</u>				<u>469</u>	<u>0</u>	<u>782</u>
Total Demand for Child Care Spaces		1,439				3,179	6,004	10,621
% Distribution		14%				30%	57%	100%
FUTURE SUPPLY		Child Care Spaces						
Family Child Care Home Supply	(6)	98	245			490	315	1,050
Child Care Center Supply		<u>80</u>	<u>458</u>			<u>2,351</u>	<u>3,642</u>	<u>6,451</u>
Future Child Care Supply		178	703			2,841	3,957	7,501
% Distribution		9%				38%	53%	100%
FUTURE SURPLUS/(SHORTAGE)	(7)	(736)				(338)	(2,046)	(3,120)
% Distribution		24%				11%	66%	100%
Percentage of Demand Met by Existing Facilities/Spaces		49%				89%	66%	71%

Note: All footnote references can be found in Appendix B Table B at the end of this file. Slight differences in sums are due to percentage rounding.

Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

Table B-16

**Future Child Care Demand and Supply in 2032 in San Bruno
San Mateo County Child Care Needs Assessment - 2022**

SAN BRUNO	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	676	584	695	254	1,533	3,178	5,387
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	64.2%	54.0%	55.5%
Resident Children Needing Licensed Care		237	402	478	105	985	1,771	2,992
Children from Non-Resident Employees	(4)							
Employees from Outside County		5,953						
Amount that Need Licensed Care		3%	<u>71</u>			<u>107</u>	<u>0</u>	<u>179</u>
Total Demand for Child Care Spaces			308			1,092	1,771	3,171
% Distribution			10%			34%	56%	100%
FUTURE SUPPLY		(5) Providers	Child Care Spaces					
Family Child Care Home Supply	(6)	32	78			153	101	332
Child Care Center Supply		<u>30</u>	<u>20</u>			<u>985</u>	<u>1,423</u>	<u>2,428</u>
Future Child Care Supply		62	98			1,138	1,524	2,760
% Distribution			4%			41%	55%	100%
FUTURE SURPLUS/(SHORTAGE)	(7)		(210)			46	(247)	(411)
% Distribution			51%			-11%	60%	100%
Percentage of Demand Met by Existing Facilities/Spaces			32%			104%	86%	87%

Note: All footnote references can be found in Appendix B Table B at the end of this file. Slight differences in sums are due to percentage rounding.

Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

Table B-17
Future Child Care Demand and Supply in 2032 in San Carlos
San Mateo County Child Care Needs Assessment - 2022

SAN CARLOS	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	708	285	506	336	1,127	2,887	4,722
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	60.6%	54.0%	54.3%
Resident Children Needing Licensed Care		248	196	348	139	683	1,632	2,562
Children from Non-Resident Employees	(4)							
Employees from Outside County		6,966						
Amount that Need Licensed Care		3%	<u>84</u>			<u>125</u>	<u>0</u>	<u>209</u>
Total Demand for Child Care Spaces			331			808	1,632	2,771
% Distribution			12%			29%	59%	100%
FUTURE SUPPLY		(5) Providers	Child Care Spaces					
Family Child Care Home Supply	(6)	12	34			68	46	148
Child Care Center Supply		<u>24</u>	<u>68</u>			<u>667</u>	<u>765</u>	<u>1,500</u>
Current Child Care Supply		36	102			735	811	1,648
% Distribution			6%			45%	49%	100%
FUTURE SURPLUS/(SHORTAGE)	(7)		(229)			(73)	(821)	(1,123)
% Distribution			20%			7%	73%	100%
Percentage of Demand Met by Existing Facilities/Spaces			31%			91%	50%	59%

Note: All footnote references can be found in Appendix B Table B at the end of this file. Slight differences in sums are due to percentage rounding.

Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

Table B-18
Future Child Care Demand and Supply in 2032 in San Mateo
San Mateo County Child Care Needs Assessment - 2022

		Child Care as of 2032							
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years	
SAN MATEO		Amount or Rate							
FUTURE DEMAND			Child Care Demand						
Estimated Total Children	(1)		2,413	1,778	1,124	1,466	4,369	8,301	15,083
Adjustment for 4 years old in TK	(2)					60%		40.0%	
Licensed Care Demand Factor or Average	(3)		35.0%	68.8%	68.8%	68.8%	59.6%	54.0%	54.7%
Resident Children Needing Licensed Care			845	1,224	774	605	2,602	4,799	8,246
Children from Non-Resident Employees									
Employees from Outside County	(4)	23,122							
Amount that Need Licensed Care		3%	<u>277</u>				<u>416</u>	<u>0</u>	<u>694</u>
Total Demand for Child Care Spaces			1,122				3,018	4,799	8,940
% Distribution			13%				34%	54%	100%
FUTURE SUPPLY		(5) Providers	Child Care Spaces						
Family Child Care Home Supply	(6)	115	306				606	398	1,310
Child Care Center Supply		<u>88</u>	<u>166</u>				<u>2,845</u>	<u>1,315</u>	<u>4,326</u>
Future Child Care Supply		203	472				3,451	1,713	5,636
% Distribution			8%				61%	30%	100%
FUTURE SURPLUS/(SHORTAGE)		(7)	(650)				433	(3,086)	(3,304)
% Distribution			20%				-13%	93%	100%
Percentage of Demand Met by Existing Facilities/Spaces			42%				114%	36%	63%

Note: All footnote references can be found in Appendix B Table B at the end of this file. Slight differences in sums are due to percentage rounding.

Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

Table B-19
Future Child Care Demand and Supply in 2032 in South Coast
San Mateo County Child Care Needs Assessment - 2022

SOUTH COAST	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	20	17	12	15	43	100	163
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	59.5%	54.0%	55.0%
Resident Children Needing Licensed Care		7	11	8	6	25	57	90
Children from Non-Resident Employees	(4)							
Employees from Outside County		0						
Amount that Need Licensed Care		3%	<u>0</u>			<u>0</u>	<u>0</u>	<u>0</u>
Total Demand for Child Care Spaces			7			25	57	90
% Distribution			8%			28%	64%	100%
FUTURE SUPPLY		Child Care Spaces						
Family Child Care Home Supply	(5) (6)	-	-			-	-	-
Child Care Center Supply		<u>4</u>	<u>12</u>			<u>45</u>	<u>92</u>	<u>149</u>
Future Child Care Supply		4	12			45	92	149
% Distribution			8%			30%	62%	100%
FUTURE SURPLUS/(SHORTAGE)	(7)		5			20	35	59
% Distribution			8%			33%	59%	100%
Percentage of Demand Met by Existing Facilities/Spaces			171%			177%	161%	166%

Note: All footnote references can be found in Appendix B Table B at the end of this file. Slight differences in sums are due to percentage rounding.

Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

Table B-20
Future Child Care Demand and Supply in 2032 in South San Francisco
San Mateo County Child Care Needs Assessment - 2022

SOUTH SAN FRANCISCO	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	1,179	1,017	1,208	442	2,668	5,458	9,305
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	64.2%	54.0%	55.6%
Resident Children Needing Licensed Care		413	700	831	182	1,714	3,043	5,169
Children from Non-Resident Employees	(4)							
Employees from Outside County		28,751						
Amount that Need Licensed Care		3%	<u>345</u>			<u>518</u>	<u>0</u>	<u>863</u>
Total Demand for Child Care Spaces			758			2,231	3,043	6,032
% Distribution			13%			37%	50%	100%
FUTURE SUPPLY		(5) Providers	Child Care Spaces					
Family Child Care Home Supply	(6)	53	136			272	188	596
Child Care Center Supply		<u>38</u>	<u>493</u>			<u>2,174</u>	<u>710</u>	<u>3,377</u>
Future Child Care Supply		91	629			2,446	898	3,973
% Distribution			16%			62%	23%	100%
FUTURE SURPLUS/(SHORTAGE)	(7)		(129)			215	(2,145)	(2,059)
% Distribution			6%			-10%	104%	100%
Percentage of Demand Met by Existing Facilities/Spaces			83%			110%	30%	66%

Note: All footnote references can be found in Appendix B Table B at the end of this file. Slight differences in sums are due to percentage rounding.

Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

Table B-21
Future Child Care Demand and Supply in 2032 in Woodside
San Mateo County Child Care Needs Assessment - 2022

WOODSIDE	Amount or Rate	Child Care as of 2032						
		Infant, Under 2 Years	2 Years	3 Years	4 Years	Total Preschool, 2-4 Years	School Age, 5-12 Years	Total, 0-12 Years
FUTURE DEMAND		Child Care Demand						
Estimated Total Children	(1)	78	34	42	32	108	465	651
Adjustment for 4 years old in TK	(2)				60%		40.0%	
Licensed Care Demand Factor or Average	(3)	35.0%	68.8%	68.8%	68.8%	60.6%	54.0%	53.9%
Resident Children Needing Licensed Care		27	23	29	13	66	258	351
Children from Non-Resident Employees	(4)							
Employees from Outside County							792	
Amount that Need Licensed Care							3%	
Total Demand for Child Care Spaces		37				80	258	374
% Distribution		10%				21%	69%	100%
FUTURE SUPPLY		Child Care Spaces						
Family Child Care Home Supply	(5) Providers							
Child Care Center Supply	(6)	1	4			8	0	12
Current Child Care Supply		<u>2</u>	<u>0</u>			<u>92</u>	<u>44</u>	<u>136</u>
% Distribution		3	4			100	44	148
			3%			68%	30%	100%
FUTURE SURPLUS/(SHORTAGE)	(7)	(33)				20	(214)	(226)
% Distribution			14%			-9%	94%	100%
Percentage of Demand Met by Existing Facilities/Spaces			11%			125%	17%	40%

Note: All footnote references can be found in Appendix B Table B at the end of this file. Slight differences in sums are due to percentage rounding.

Sources: 2020 U.S. Census; ABAG Projections 2040 (Oct 21); American Community Survey 2018; ACS Journey-to-Work data 2019; 4Cs-Child Care Coordinating Council of San Mateo County; Brion Economics, Inc.

Appendix B Table

Endnotes for Tables for Future Conditions - 2032

San Mateo County Child Care Needs Assessment - 2022

- (1) Population by age is based on AIR Data by Zip Code 5-year estimate for 2018 sorted by city, and adjusted by ABAG population growth estimates to 2022.
- (2) For 2032 figures, 40% of 4-year-olds are included in School Age children, as more 4 year olds are forecast to be in Transitional Kindergarten in the future.
- (3) Not all children are assumed to need licensed care: demand factor percentage assumptions are used to calculate the number of children requiring licensed care under each age category. The remaining children are assumed to be cared for in alternate arrangements, such as by family members, nannies, friends, and other unlicensed care. The demand factors represent the Preferred Use of Care reported in the 2022 Parent Survey conducted for this Needs Assessment. See Chapter 2.
- (4) American Community Survey 5-Year Estimated Tables Workers 16 and over, for 2019, estimates the number of workers commuting from other counties. Percentage of workers from other counties requiring licensed care is typically 3%. Of that 3%, 40% of children are infants and 60% in Preschool. Grade school children typically have care near home, not near the parents' place of work.
- (5) Data on child care supply provided by the 4Cs-Child Care Coordinating Council of San Mateo County, Sarah Kinahan, Coordinator, Child Care Partnership Council, and Community Care Licensing, CA Department of Social Services. Data is as of April to May, 2022, and includes planned future supply where known.
- (6) For Large FCCHs licensed for 14, it is estimated that there are 3 infant, 6 preschool, and 5 school age spaces. For Large FCCHs licensed for 12, it is estimated that there are 4 infant and 8 preschool spaces. For Small FCCHs it is estimated that there are 2 infant, 4 preschool, and 2 school age spaces.
- (7) Demand that calculates as less than 100% means that there is greater demand than supply; percent of demand that is over 100% means supply exceeds demand.

Source: Brion Economics, Inc.