



THE CHILD CARE LANDSCAPE IN ONONDAGA COUNTY: A SUPPLY & DEMAND ANALYSIS

INTRODUCTION...

Comprehensive studies suggest that high quality early child care leads to greater school readiness, grade retention, academic achievement, high school completion, family stability, stable employment, higher income, home ownership, reduced health care expenses, and less crime.¹ In 2021, the Early Childhood Alliance sought to better understand how families in Onondaga County access child care. Working in partnership with Child Care Solutions and the Onondaga County Department of Social Services - Economic Security (DSS-ES), we commissioned Syracuse University's Maxwell X Lab and the R/E/D Group to conduct a comprehensive child care landscape analysis.

PROCESS & FINDINGS...

Using a supply and demand estimation framework, the study sought to understand access to child care among families with children aged zero through five and identify the areas in Onondaga County with the greatest unmet needs for care. The study also considered the demand for and provision of subsidized child care. To contextualize this data, focus groups and a survey were used to solicit the lived experiences and input of parents and providers.

IN BRIEF...

This study provides an overview of the child care landscape in Onondaga County. We aim to use the findings to guide investments and work toward an equitable child care system that supports all children in meeting their full potential. As we assess opportunities to strengthen or improve child care, there are three key factors to consider: affordability, accessibility, and quality.



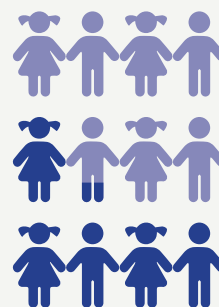
- Accessibility:** Supply does not meet needs.
- Affordability:** Cost exceeds family's ability to pay.
- Quality:** High quality care is expensive; it depends upon a well-trained and fairly-compensated workforce.

QUANTITATIVE RESULTS



Between 2019 and 2021, there was a **27% decrease** in the total capacity of formal & regulated child care programs serving children under age five.

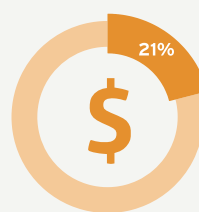
Across Onondaga County, the highest concentration of child care providers are in the towns/cities of **Onondaga, Syracuse, Dewitt, Clay, Lysander, and Salina.**



As of 2021, we estimate that the **supply** of formal and regulated child care for children under the age of five in Onondaga County **meets 44% of the demand.**



In 2015, Onondaga County DSS-ES provided **5,528 families** with child care subsidies. By 2021, that figure had dropped to **2,265**, representing a **59% decrease** in the provision of subsidies over a six-year period.



As of 2021, only **21%** of the families that were eligible for and had a potential demand for child care utilized child care subsidies.

1. Heckman, J. J. (2012). Invest in early childhood development: Reduce deficits, strengthen the economy. The Heckman Equation, 7, 1-2.

QUALITATIVE RESULTS

Through county-wide surveys and focused conversations, both parents and providers offered insight into how they experience child care: the challenges, the impact, and the implications. Concerns from providers centered around an unstable workforce, insufficient wages, and lack of consistent funding to support capital projects. The top concerns parents and caregivers noted were:



The **cost** of care being **too high**.



Needing **different** and/or **additional hours** of care.



Lack of safe, reliable **transportation**.



Lack of availability and/or **long wait lists**.

“ My biggest worry about taking the new job opportunity was child care. Wait lists are insane, especially for the places that have really amazing reviews. ”

Focus Group Participant

“ I didn't have transportation. I had to get up at 4:00 am to get me and my baby ready to catch the bus downtown. Then transfer over to get my baby to daycare, wait like 30-40 minutes, catch the bus going all the way back downtown, and then catch and connect the bus to go to school. ”

Focus Group Participant

KEY TAKEAWAYS...

- 1 The current supply of child care in Onondaga County is not sufficient to meet demand.
- 2 There is a large gap between those who are eligible for and receiving child care subsidies.
- 3 Families are struggling to pay for child care.
- 4 Available care does not meet family need (e.g., hours of care, location).
- 5 Providers are struggling to recruit and retain a workforce that meets current demand.
- 6 While significant, recent investments are not sufficient to sustain long-term change.

CONCLUSION...

The data is clear: Onondaga County does not have enough child care to meet current or potential demand. This challenge is underscored by the fact that care has been largely unaffordable for many families. Considering recent statewide and local policy shifts designed to broaden the impact of child care subsidies, affordability may prove to be less of a concern in the months and years to come. Still, this begs the question: If more families can now afford to pay for care, is there enough availability in the system to support this increased demand? Our data shows us that the local child care ecosystem is already strapped and requires robust, systemic investment to meet a rise in demand.

While significant progress has been made, there is still much work to be done to ensure that all families, including those outside of the subsidy system, have access to affordable high quality child care. Additional investments must be made to attract and retain a high-quality workforce. It is also critically important to note that sustaining these investments will require that the federal government or New York State identify sustainable sources of funding. Until the child care system is fully funded, such that providers are paid the true cost of providing quality care and families can afford the child care they need, we will continue to face systemic barriers to caring for the children in our community.