

MAPPING THE GAP™

EXPLORING CHILD CARE SUPPLY & DEMAND IN ARIZONA

State Overview

The cost of child care in Arizona on average makes up greater than 12 percent of the median income, with single parents paying 40 percent of their income for infant care and married parents with two kids living at the poverty line paying 77 percent of their income on center care. The average annual cost for center-based care is \$10,412 and \$7,057 for home-based care. The average cost of child care for a four-year-old is \$8,275 for center-based child care and \$6,603 for home-based child care. For more information on the cost of care in your state, visit our [2017 Parents and High Cost of Child Care Report](#).

In Arizona, we examined three key issues around child care supply and demand: overall supply of child care slots compared to the number of working parents across the state; the supply and demand for infant/toddler care in two communities – one urban and one rural; and whether Child Care Development Fund subsidies mirror the demand for those subsidies and the providers accepting subsidy.

Mapping Child Care Supply and Demand Gaps

For each map, we examined the locations of child care providers and children by zip code, including county boundaries for reference.

Data Collection

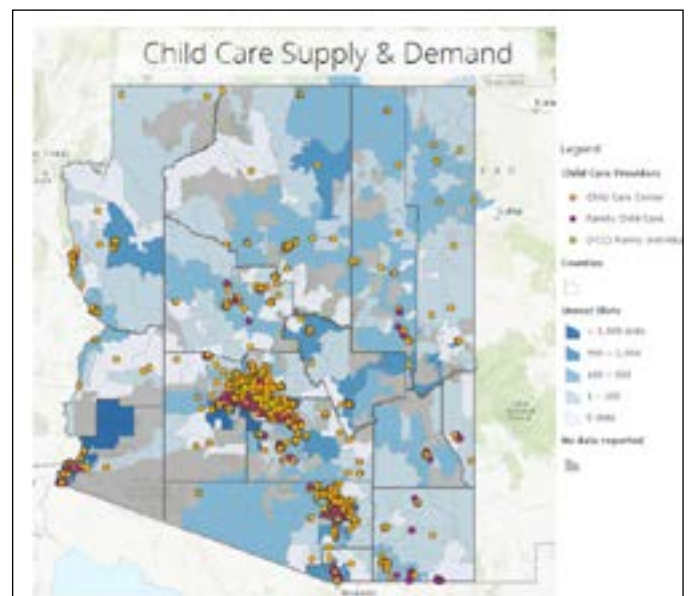
Supply:

The licensed child care programs and the number of slots per center were obtained using data from NACCRRAware with permissions from the license holder in January, 2018.

Demand:

The number of children under the age of 6 with all parents in the labor force in each zip code was obtained

using the most up-to-date Census data, specifically the “U.S. Census Bureau, 2011-2015 American Community Survey 5-Year-Estimates, B23008.” We use this table to estimate the number of children who may be needing child care, as all available parents are participating in the labor force. The licensed child care programs and the number of slots per center were obtained using data from NACCRRAware with permissions from the license holder in January 2018.



Findings

In Arizona, there are 302,591 children under the age of 6 with all parents (married or single) in the labor force. There are 2,207 center-based child care programs and 696 family child care homes in the state, providing 280,363 licensed child care slots.

This means working families in Arizona face a deficit of 22,228 licensed child care slots across the state.

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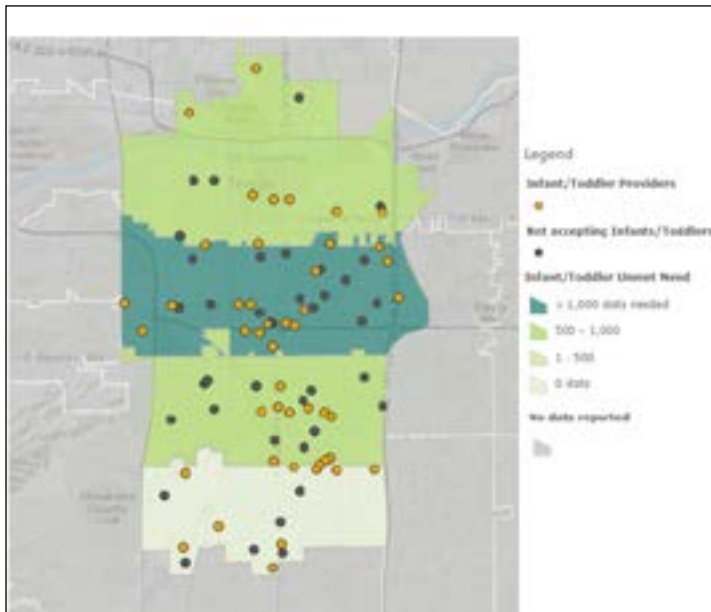


Each blue or white zip code represents a zip code. The darkest blue areas are zip codes that have the largest gaps of unmet need (the difference between number of children living in that area and number of child care slots available). Child care programs of each type are spread throughout the state, largely concentrated around Phoenix and Tucson, which can leave substantial gaps in rural parts of the state. However, due to highly concentrated demand around cities and limited supply, working families in both urban and rural areas still face challenges in finding licensed child care.

Mapping Infant & Toddler Supply and Demand Gaps

Our state partners at [Child Care Resources & Referral – Arizona](#) were especially interested in mapping infant/toddler care supply and demand. There are approximately 146,000 children under the age of 3 (infants and toddlers) in Arizona. While it's difficult to estimate across the whole state how many slots are reserved for infants and toddlers, our CCR&R partners know that there are whole regions of the state that don't have enough licensed slots for infants or toddlers. In this map, we looked at two very different communities in Arizona. In this story map, we looked at infant toddler supply and demand gaps in two very different communities in Arizona.

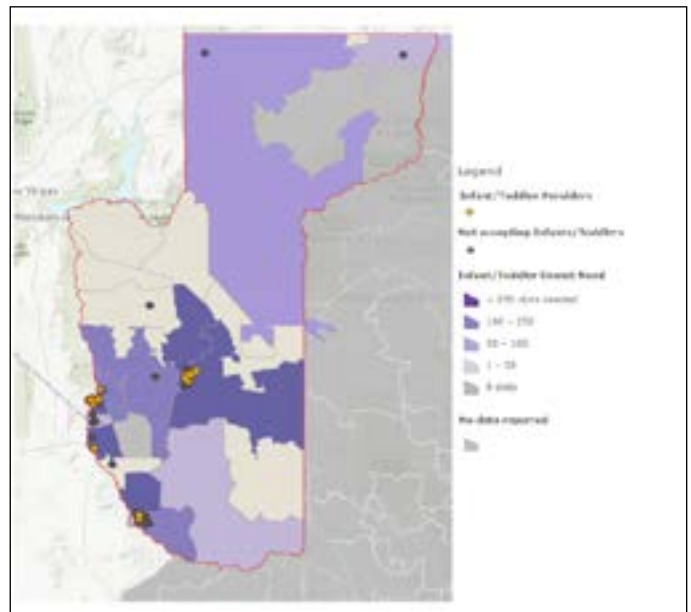
Spotlight 1: Tempe, AZ



Tempe, AZ is a city in Maricopa County with a total population of approximately 182,000 people, and about 4,000 children under 3 years old.

We found that only 1 in 3 infants and toddlers have access to child care in their community.

Spotlight 2: Mohave County, AZ



Mohave County, the Northwest, is much more rural. The population for the whole county is approximately 200,000, and about 3,500 children under 3 years old.

We found that only 7% of infants and toddlers have access to licensed child care in Mohave County.

Data Collection

Supply:

The licensed child care programs and the number of slots per center were obtained using data from NACCRRAware with permissions from the license holder in January 2018. For Tempe spotlight, state partners surveyed child care providers in Tempe to determine the number of slots available for infants.

Demand:

To determine approximate demand, we used the "Census table B13012: Women 16 to 50 Years Who Had a Birth in the Past 12 Months by Marital Status and Labor Force Status, 5-Year Estimates". Using estimates for years 2013-2015, we approximate the number of children under 3 years old in a given borough. This table was used to approximate the data because the census does not provide data on for children under 3 years old.

Child Care Cost and Subsidy Use

In Arizona, married couples with two children living at the poverty line pay 77 percent of their household income for center-based care. For families with an

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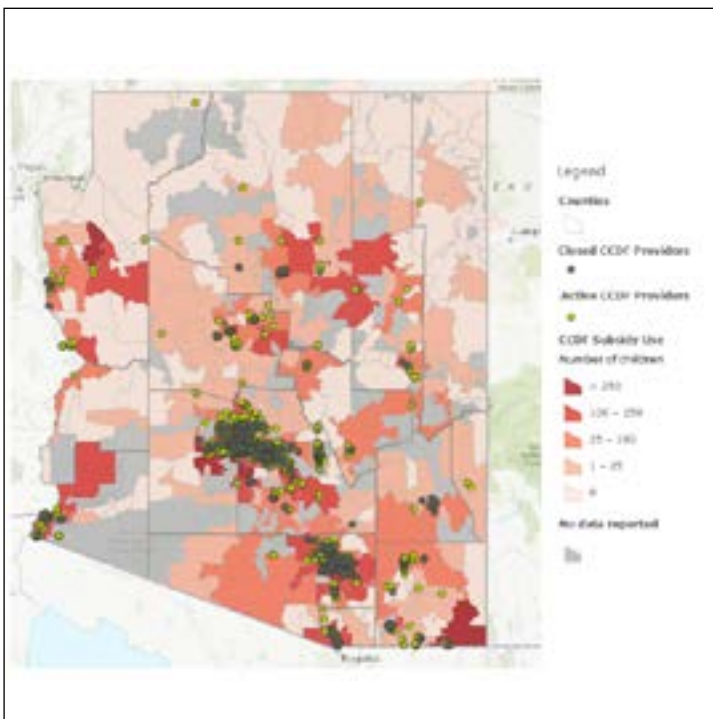
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infant and four year old in child care, married couples pay \$18,687 for center-based care and \$13,660 for home-based care per year. For more information about the cost of child care in Arizona and the rest of the 50 states, see our report, [Parents and the High Cost of Child Care: 2017](#).

The Child Care Development Fund (CCDF) helps bridge this gap for families. However, the number of the providers who are closing, and therefore no longer accepting CCDF subsidies, is a growing concern in the state. Over the past year, around 450 child care providers who are accepting CCDF subsidies have closed, leaving families relying on these programs with limited options for child care. Scroll through this map to see subsidy use and waitlist by zip code, programs that are still accepting subsidies (active), and programs that closed and are therefore no longer accepting subsidy.

In 2016, there were 2,186 child care providers across Arizona accepting child care subsidy. As of Fall, 2017, there were only 1,738 providers still accepting subsidy – a decline of 448 providers.



Policy Recommendations

Like families in many states, Arizona families are struggling to find high-quality child care. Since gaps between the supply and demand for licensed child care exist across the state, many working families in Arizona may not have the options for the type of care that they want and need.

For federal policy recommendations that support child care and working families, see [Child Care Aware® of America's 2018 Policy Agenda](#)

In order to address these gaps and help working families, some next steps should include:

- **Funding designated for early childhood education** – Providing incentives for new and existing providers to enroll in Arizona's QRIS system could allow more providers to enter the market. Enrollment in the QRIS, [Quality First](#), provides additional funding to providers which could allow them to expand their slots for infant and toddlers.
- **Workforce support and recruitment** – Child care providers have a difficult, but extremely important, job caring for the youngest in Arizona. Workforce recruitment, support, and retention efforts should be targeted toward counties with high supply and demand gaps.
- **Monitor the issues** – These maps are a baseline to get a better understanding of what is happening across Arizona. Demand for child care may be far out-pacing the current supply. As policy, strategy and funding changes, this unique issue, as well as overall the overall quality of child care supply in Arizona, should be re-visited to best serve Arizona families.

Child Care Resource & Referral agencies (CCR&Rs) are uniquely positioned to support the study of and address child care supply and demand issues across the state. In fact, CCR&Rs are specifically called out in the Child Care and Development Block Grant (CDBG) Act of 2014 legislation to help identify supply and demand issues and share information with the state to help target funding to address the issues. An increase in funding for CCR&Rs to do this work is crucial. [Child Care Resource & Referral - Arizona](#) possesses a wealth of knowledge about the regional and state-wide needs of families, as well as how best to support the provider workforce. However, without funding designated for early childhood education in the state, CCR&Rs may not have the bandwidth to recruit and retain quality, licensed providers.

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