
Oregon's Child Care Deserts 2022: Mapping Supply by Age Group and Percentage of Publicly Funded Slots

Prepared for the **Oregon Early Learning Division**

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Oregon's Child Care Deserts: Mapping Supply by Age Group, Metropolitan Status, and Percentage of Publicly Funded Slots

Abstract

Many families with young children live in what experts have defined as a *child care desert*, a community with more than three children for every regulated child care slot. This is a follow-up report to the first two reports on child care desert status of Oregon's counties as of 2018 and early 2020. As of December 2022, using the child care desert standard, families with infants and toddlers in 35 of 36 Oregon counties still live in a child care desert. The picture is slightly better for families with preschool-age children; families in 18 of 36 counties live in a child care desert. The majority of Oregon's child care supply is parent-funded (tuition and fees); public funding makes up less than a quarter of slots across the state yet plays a crucial role in the child care supply. Between early 2020 and 2022, the number of publicly funded slots for infants and toddlers increased by 49% and publicly funded slots for preschooler by 30%. Without publicly funded slots, all except three Oregon counties would be child care deserts. Nonmetropolitan counties tend to have a higher proportion of public slots compared to metropolitan counties. In addition, higher percentages of preschool slots are publicly funded as compared to infant/toddler slots. The current report focuses on child care supply – how available child care is in a community. These findings should be considered along with additional information about affordability and quality of child care to better understand the extent to which Oregon's child care is equitably meeting children and families' needs. This study provides a starting place for considering the multifaceted issues that shape a family's access to child care. For one-pager overview of results, see [page 20](#).

Introduction

Oregon families, especially those with infants and toddlers, struggle to find care and education for their children. In addition to their concerns about quality and affordability, families often struggle just to find an arrangement. Supply is a measure of how much child care is available in a geographic region that families that region could *potentially access*¹. National experts² define a child care desert as a community with more than three children for every regulated child care slot. That is, 33% or fewer children in a community have *potential access* to a slot. Policy makers have joined families in expressing concerns about the adequacy of the child care supply; the COVID-19 pandemic accentuated this concern.

In this report, we define infants and toddlers as children ages birth through the end of age 2, and preschool-age children as children age 3 through the end of age 5.

We define parents broadly as all types of primary caregivers, such as parents, grandparents, and foster parents.

¹Child care access is multidimensional and many factors shape a family's access to care; supply is one factor. For more information of the different dimension of access see: https://www.acf.hhs.gov/sites/default/files/documents/opre/cccepra_access_guidebook_final_213_b508.pdf

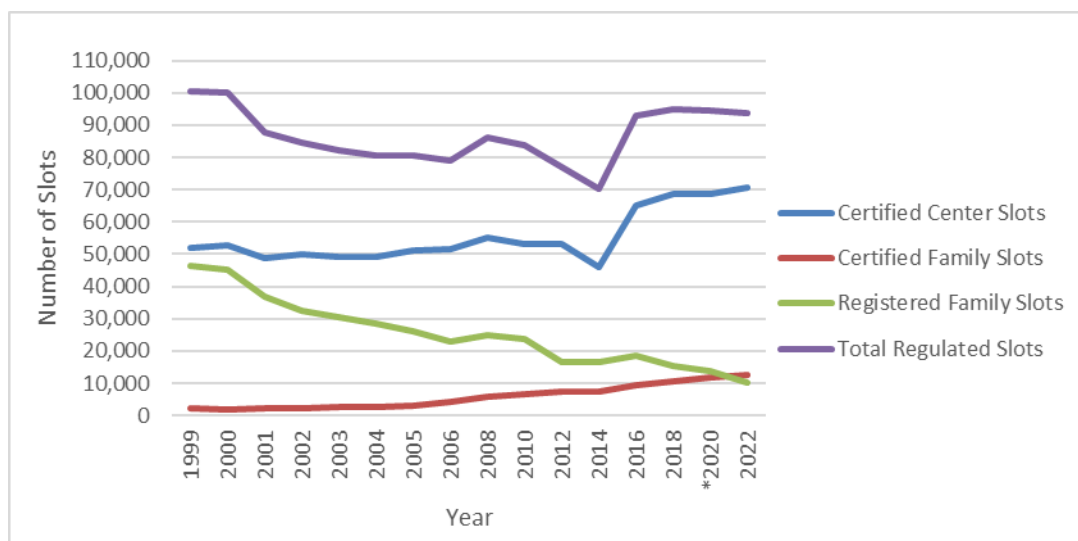
²Malik, R., Hamm, K., Schochet, L., Novoa, C., Workman, S., & Jessen-Howard, S. (2018, December 6). America's child care deserts in 2018.

Retrieved from <https://www.americanprogress.org/issues/early-childhood/reports/2018/12/06/461643/americas-child-care-deserts-2018/>

An inadequate supply of child care is not a new problem in Oregon. The Oregon Child Care Research Partnership (OCCRP) has been studying child care supply since the 1990s. The following graph shows that, although the number of child care slots in centers and large family (certified) child care homes have been steadily growing since 1999, the number of slots in small family (registered) child care homes has steadily declined. Between 1999 and 2022, the total number of child care slots for children under age 13 declined by approximately 6,600 slots. The number of slots in centers and large family child care homes increased by approximately 29,000 slots, but the numbers in small family child care homes decreased by approximately 36,000 slots. Growth in center and large home-based care has not made up for the decline in small home-based care. The total number of slots was lowest in 2012 and has been steadily growing since that time, but remains 6,600 slots below 1999 levels. Families struggle to find care for their young children across the state, and policy makers want to understand the child care supply as it will help identify strategies likely to be successful.

Figure 1

**Regulated Oregon Child Care Supply for Children Under Age 13:
1999-2022**



*2020 is pre-COVID

In January 2019, the Oregon Child Care Research Partnership, a partnership that includes Oregon's Early Learning Division (ELD), published Oregon's first report on child care deserts³ by age group (infant/toddler versus preschool-age children) and funding source (public versus non-public funding of slots). A follow-up report⁴ was published as of early 2020 to identify the child care deserts status of Oregon counties prior to the COVID pandemic⁵. This report follows up two

³ Pratt, M., Sektnan, M., & Weber, R. B. (2019, January). *Oregon's child care deserts: Mapping supply by age group, metropolitan status, and percentage of publicly funded slots*. Corvallis, Oregon: Oregon State University, College of Public Health and Human Sciences. health.oregonstate.edu/early-learners/research/oregon-child-care-deserts-2018

⁴ Pratt, M. & Sektnan, M. (2021, May). *Oregon's Child Care Deserts 2020: Mapping Supply by Age Group and Percentage of Publicly Funded Slots*. Corvallis, Oregon: Oregon State University, College of Public Health and Human Sciences. health.oregonstate.edu/early-learners/research/oregon-child-care-deserts-2020

⁵ In response to COVID-19 global pandemic, Governor Kate Brown declared a State of Emergency in Oregon on March 8, 2020. On March 25, 2020, child care providers were ordered to close unless they were providing Emergency Child Care (ECC). The COVID pandemic and resulting closures have greatly changed the landscape of the child care supply in Oregon. The 2020 report described the supply of child care as of March 1, 2020 (pre-COVID), providing a baseline prior to the pandemic.

years post-pandemic to assess changes in the Oregon's early care and education over time.

In defining deserts, Oregon researchers used the definition of more than three children per regulated child care slot at the county level. By working with partners, OCCRP was able to create a child care supply dataset that included information on the population of children in a county by age group and number of child care slots by age group, as well as data on whether or not the slots were publicly funded.

In this report, we define a *child care desert* as a county with more than three children for each regulated child care slot.

What this dataset enabled us to discover is which geographically-defined communities have an adequate child care supply and which geographically-defined communities do not, according to the child care desert metric. For example, we will be able to answer the question, “Do some Oregon counties have more adequate child care supply than others?” We expect there to be geographic variation, because prior research has revealed that child care supply is relatively more adequate among urban compared to rural communities⁶. What we cannot determine from analyzing this dataset is which children and families are able to afford and use the available child care supply and which children and families are not. For example, we cannot answer questions such as, “Do African American and Black families have adequate access to high quality, affordable child care that meets their needs?” or “Do families with children experiencing disabilities and/or chronic health care needs have adequate access to high quality, affordable child care that meets their needs?” While we recognize that these are important questions to answer, it is beyond the scope of the current dataset to do so.

In the current study, we look at how supply and public funding vary by age and county. Using this dataset, we address the following questions:

1. How adequate is Oregon's child care supply for children ages five and under? Specifically, how many counties are child care deserts? How does the supply of preschool-age care compare with that for infants and toddlers? How has this changed since early 2020?
2. What percentage of child care slots are publicly funded? Does the percentage vary by age group served? Has public investment changed since early 2020?

⁶ Pratt, M, Weber, B., Sektnan, M., Caplan, S., Houston, L. (2020, September) *Supply and Demand in Oregon: How Equitable is Child Care Access*. Corvallis, Oregon: Oregon State University, College of Public Health and Human Sciences. Retrieved from <https://health.oregonstate.edu/early-learners/research/supply-and-demand-oregon-young-children>

Methods

The child care supply analyses reported here relied on numerous data sources, but the foundational dataset was the Estimating Supply (ES) dataset put together by Oregon State University (OSU). To create this dataset, OSU worked with Central Coordination at Western Oregon University. First, licensing data (Child Care Regulatory Information System) and Child Care Resource & Referral (Find Child Care Oregon⁷) databases were merged to ensure all child care facilities were included. Then Central Coordination managed a data update process in which data on capacity and price by age group were collected from Oregon child care facilities within a three-month period to ensure all data were comparable and current. Central Coordination provided the updated data to OSU for use in multiple studies. Of relevance for these analyses, the dataset included data on each facility's regulatory status and desired capacity by age group as of December 2022.

For the purpose of this report, the supply of child care includes regulated (licensed) slots in Certified Centers, Certified Family homes, and Registered Family homes, as well as a few license-exempt and recorded facilities that receive public funding.⁸ We will refer to this as the regulated supply throughout this report.

Based on this definition, Oregon had an estimated 71,153 regulated child care slots for young children ages 0-5 in 2022, with 75% of slots in centers, 16% slots in large (certified) home-based care, and 9% in small (registered) home-based care. Non-metropolitan⁹ counties have a similar percentage of center slots (78% vs. 75% metro), slightly larger percentage of small home-based care (13% vs. 9% metro), and fewer large home-based facilities (9% vs. 17% metro). Figure 2 displays the number of regulated slots by type of facility.

Figure 2

Type of Care	Young Children 0-5 Slots	
Centers	53,536	75%
Large Home-Based	11,049	16%
Small Home-Based	6,568	9%
Total All Types	71,153	100%

⁷ In late 2020, the database system used by the Child Care Resource and Referral system changed from NACCRRAware to Find Child Care Oregon (FCCO).

⁸ Between 2018 and 2020 there was a notable shift in the number of facilities that moved from regulated to license-exempt status. This can be attributed to an [Oregon Administrative Rule](#) change that stated as of October 2018 centers operated by a school district, political subdivision of this state, or a government agency were no longer required to be licensed by the Office of Child Care. However, since some of these facilities (n = 122) continue to receive public funding (e.g., Head Start, Preschool Promise, Oregon Prenatal to Kindergarten), we include them into our definition of regulated supply in order to accurately represent the number of public slots in the state. These license-exempt and recorded programs with public slots are included as centers in Figure 1.

⁹ Metropolitan and nonmetropolitan counties were defined using the U.S. Office of Management and Budget Core-Based Statistical Area classification. Counties were classified as metropolitan if they include an urbanized area of 50,000 inhabitants or more, plus outlying counties with close economic or social ties to the central county. Nonmetropolitan counties include two groups: micropolitan and noncore. Micropolitan counties include at least one urban cluster of between 10,000 and 49,000 people, plus outlying counties. Noncore counties have no population cluster larger than 10,000.

Data on capacity of publicly funded facilities by age group came from multiple sources. The Early Learning Division (ELD) administers several publicly-funded early learning programs: Oregon Prenatal to Kindergarten (Head Start Prekindergarten and Early Head Start), Preschool Promise, and Baby Promise. ELD program managers provided lists of funded programs. Lists included facility identification information and numbers of children served or slots funded by each program. Oregon has a limited number of federally funded Head Start (HS) programs that did not receive OPK funding and were thus not on the ELD lists. These included federal Head Start/Early Head Start, tribal HS, and Migrant and Seasonal HS programs. The Oregon Child Development Coalition (OCDC) manages the Migrant and Seasonal Head Start programs. Many programs blended funding and hence were on ELD lists and also were federally funded. Thus, in addition to using the ELD lists, researchers identified programs that had OCDC or Head Start in their facility name or were listed as receiving federal funds on the Head Start Early Childhood Learning and Knowledge Center website but had not appeared on an ELD list.

Public slots included in this report do not capture all public investments in child care. For instance, investments in the Employment-Related Day Care program (ERDC) are not included in this analysis of slots. Although ERDC, which is Oregon's child care subsidy program, helps families pay for child care, it typically does not create child care slots¹⁰. Families who receive ERDC rely on the regulated or legally-operating unregulated slots in their community to find a slot into which they enroll their child. A subsidy voucher partially helps them purchase care in one of those slots. Most parents pay part of the cost, i.e., their copay.

In addition, the number of publicly funded slots is likely underestimated. Local entities such as school districts or counties sometimes use their own public funds to deliver child care services, but that information was not in the available data and so those slots could have been missed. Head Start Child Care Partnerships use federal dollars to fund child care slots within community facilities, but those community facilities may not have been identified in the dataset. Also, families receiving Relief Nursery services often participate in a publicly funded early learning program, but a reliable number of those who participated in these programs was not available.

Getting to precise values for facility capacity provided challenges. The Estimating Supply (ES) dataset included counts of desired capacity, that is the number of slots that could be filled at a given time. Most programs were full day, so the desired capacity represented the number of children the program hoped to serve at any one given time. But part-day programs often seek to fill that capacity more than once in a day, e.g., in the morning and afternoon. In those cases, the desired capacity reported in the ES dataset would be smaller than the number of children served. In some cases, the ELD lists included values for the number of children served. Thus, by manually matching data from the ES dataset with that from the ELD lists, researchers were able to develop estimates for child care slots.

Researchers included counts aligned with their stated desired capacity only if the program offered a facility-based early learning program. In a few instances, ELD lists included numbers of children served with home visiting rather than in a center or home-based early learning

¹⁰ The Oregon child care subsidy program has a small Contracted Slots program that contracts with providers. That program primarily funds Head Start programs to extend hours of services for eligible employed parents. This transforms part-day Head Start funded slots into full-day slots.

program. When ELD lists included larger values of numbers served than the desired capacity values in the Estimating Supply dataset, researchers checked to see if the program offered a home visiting program.

Population estimates from the Population Research Center at Portland State University were used to calculate the percent of children who had potential access to a slot. Estimates were from the 2022 Annual Population Report Tables, released April 24, 2023. In line with national practice, child care desert estimations used child population estimates by age group. Attempting to estimate the number who need child care would be out of line with national efforts and would be likely to introduce error as there are no reliable estimates of child care need. The population estimates can be thought about as the total potential demand for care.

Findings

In examining the adequacy of the supply of child care and early education for young children in Oregon, we identified child care deserts and looked for association of deserts with public funding. We asked two main questions:

1. How adequate is Oregon's child care supply for children ages five and under? Specifically, how many counties are child care deserts? How does the supply of preschool-age care compare with that for infants and toddlers? How has this changed since early 2020?
2. What percentage of child care slots are publicly funded? Does the percentage vary by age group served? Has public investment changed since early 2020?

For each question, we also assessed how supply varied by child age (i.e., infant/toddlers compared to preschoolers). Below we summarize the answers to each question while also displaying the information in maps and tables.

How adequate is Oregon's child care supply for children ages five and under? Specifically, how many counties are child care deserts? A county is a child care desert if there are more than three children for every regulated child care slot. Another way of representing the desert definition is to show the percentage of children in the county with potential access to a slot. Having a slot for fewer than 33% of the county's children is the same as having more than three children for every slot. Using the second definition facilitates county comparisons.

Statewide, 28% of Oregon's children age five and under have potential access to a regulated child care slot (18% of infants and toddlers and 37% of preschool-age children). This equates to roughly six infants and toddlers for every infant/toddler slot and three preschool-age children for every preschool-age child care slot.

As seen in Figure 3 and [Map 1](#), 35 of the 36 Oregon counties are child care deserts for infants and toddlers¹¹ and 18 of the 36 (50%) counties are deserts for preschool-age children¹². In addition, for infants and toddlers over a third of Oregon's counties are extreme deserts, where

¹¹ Gilliam County moved from being a child care desert for infant and toddlers in early 2020 (32% access) to not a desert in 2022 (35% access).

Gilliam County experienced both an increase in infant/toddler slots (from 14 to 18) and a decrease in estimated population of children in this age range (from 68 to 52), therefore moving the county out of child care desert range for infants and toddlers.

¹² The following counties are not child care deserts for preschool-age children: Baker, Benton, Clatsop, Deschutes, Gilliam, Harney, Hood River, Jefferson, Josephine, Klamath, Lincoln, Malheur, Multnomah, Sherman, Umatilla, Wasco, Washington, and Wheeler.

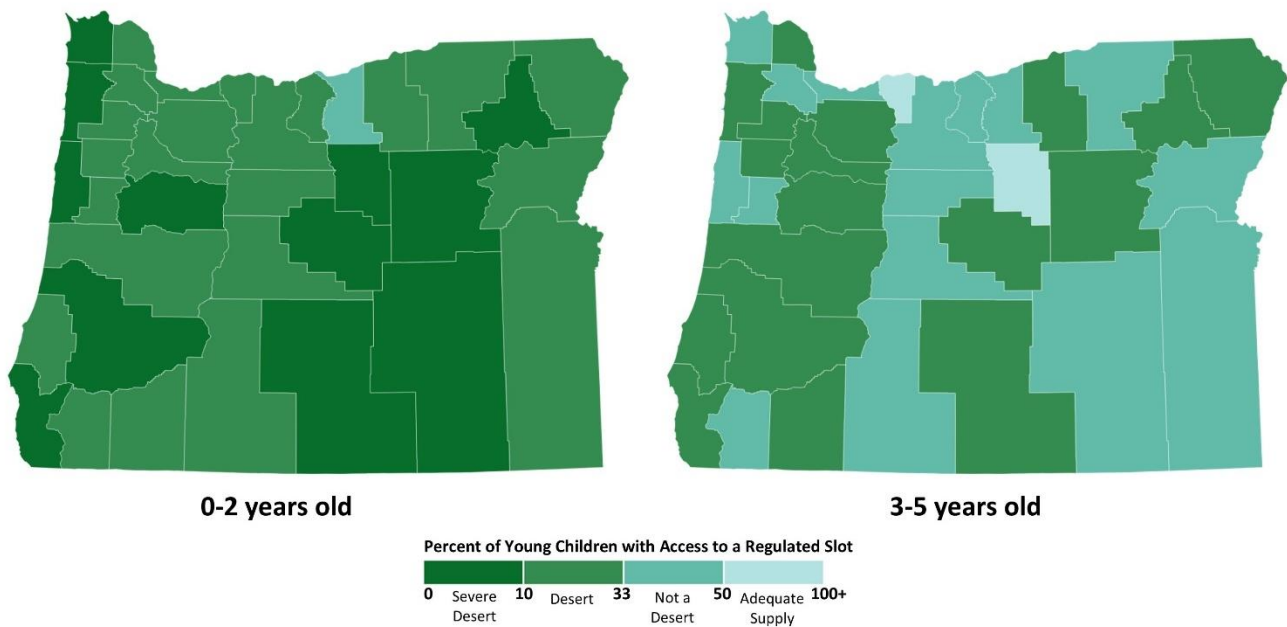
there is, at most, one slot for every 10 children. See [Table 1](#) on page 18 to view the percentage of potential access to child care in each county.

Figure 3

Percentage of Counties Ranked by Desert Status

	0-2 years		3-5 years		0-5 years	
Percent Access to a Slot	N	%	N	%	N	%
Severe Desert (0 - 10%)	12	33%	0	0%	0	0%
Desert (10 - 33%)	23	64%	18	50%	32	89%
Not a Desert (34 - 50%)	1	3%	16	44%	4	11%
Not a Desert (>50%)	0	0%	2	6%	0	0%
Total	36		36		36	
Desert	35	97%	18	50%	32	89%
Non-Desert	1	3%	18	50%	4	11%

Map 1: Percent of Young Children with Access to a Regulated Child Care Slot by Age Group



For larger view of map, see page 16.

How has the adequacy of Oregon’s child care supply for children ages five and under changed from early 2020 to 2022? When comparing child care deserts across time, it is important to note that desert status is assessed at a snapshot point in time. For the 2020 Child Care Desert Report, this snapshot was as of March 2020 (pre-COVID), whereas the current 2022 Report is describing desert status in December 2022, nearly three years beyond the beginning of the pandemic. In between these two time points, we acknowledge that the landscape of the child care supply in Oregon was greatly impacted by the COVID-19 pandemic¹³, resulting in

¹³ In March 2020, Oregon’s [Executive Order 20-12 \(Stay Home, Save Lives\)](#) ordered Oregonians to stay at home, closed specific businesses, required social distancing measures, and imposed requirements for outdoor areas and child care facilities due to public health threat of COVID-19.

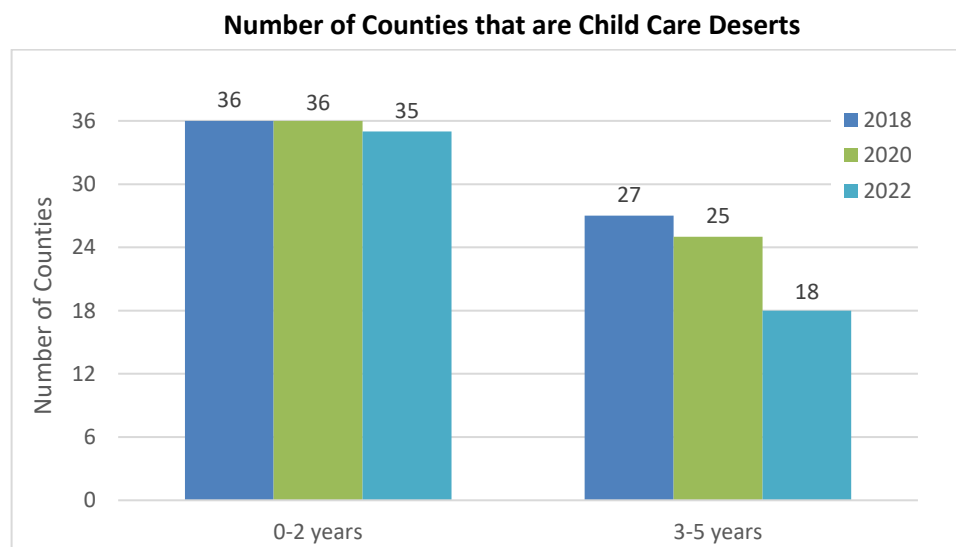
significantly lower availability of child care during this time. However, since these reports are looking at only the pre-COVID and current time points, the specific impact of the pandemic is outside of the scope of this report. That said, the increase in child care supply from early 2020 to December 2022 speaks to the recovery of the child care and early education field in the wake of the pandemic.

Compared to early 2020 (pre-COVID), the total regulated supply for young children increased by an overall 3,172 slots in 2022 (infant/toddler slots increased by 1,789, preschool slots increased by 1,383). For infants and toddlers, all counties were child care deserts in 2020, with one county moving out of desert status in 2022 (Gilliam¹⁴). For preschool age children, eight counties (Baker, Clatsop, Deschutes, Harney, Josephine, Lincoln, Malheur, Umatilla) moved from being child care deserts in 2020 to not being deserts in 2022. One county (Lane) became a child care desert in 2022 when it had not been in 2020¹⁴.

There were also shifts in the severity of desert status for a few counties. For infants and toddlers, eight counties (Columbia, Coos, Jackson, Marion, Morrow, Sherman, Umatilla, Wallowa) became less severe deserts moving from 0-10% of children with access to 10-33% of children with access. One county (Douglas) became a more severe desert, moving from 10-33% of children with access in 2020 to less than 10% of children with access in 2022.

Over time, most Oregon counties have remained child care deserts for infants and toddlers. Whereas the number of counties that are preschool child care deserts has decreased over time, with 27 in 2018, 25 in 2020, and 18 counties in 2022.

Figure 3



It is important to note that not being a child care desert does not necessarily mean that the supply is sufficient for all families that need care, as approximately two-thirds of Oregon

¹⁴ Lane County has been right around the desert cutoff over the last three Desert Reports. In 2018, it was a desert (31%), in 2020 it was not (35%), and in 2022 it returned to desert status (32%).

children five and under have two employed or a single employed parent¹⁵. Nor does not being a desert mean that quality and affordability are not issues that shape a family's ability to use the care available.

What percentage of child care slots are publicly funded? For this analysis, publicly funded slots are those slots funded by Oregon Prenatal to Kindergarten (Head Start Prekindergarten and Early Head Start), Preschool Promise, Baby Promise, Federal and Tribal Head Start/Early Head Start, and Federal Migrant and Seasonal Head Start managed by the Oregon Child Development Coalition. These slots are typically available only to children from low-income families.

Overall, 24% of regulated slots for children ages five and under in Oregon are publicly funded, with the percentage of publicly funded slots varying substantially by age group. Of slots for infants and toddlers, only 11% are publicly funded, whereas 31% of slots for preschool-age children are publicly funded. See [Table 2](#) on page 19 for the number and percent of publicly funded slots by county.

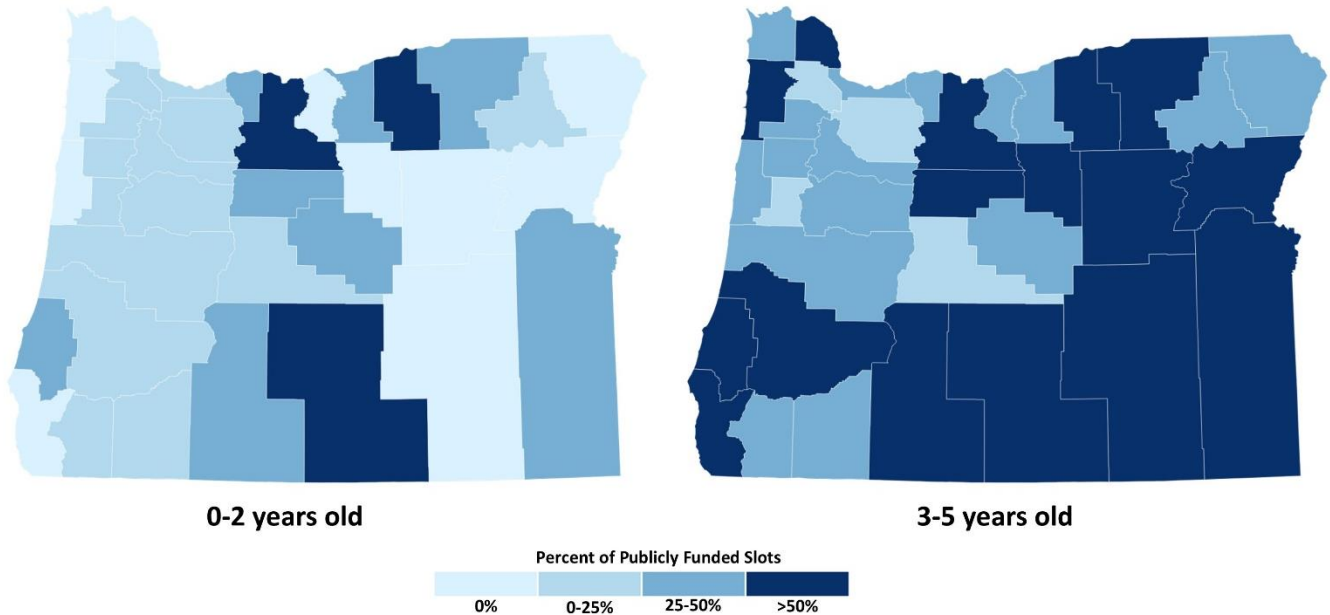
As can be seen in Figure 4 and [Map 2](#), the percentage of publicly funded slots varies across Oregon counties. Although 78% of counties have more than 25% of their 0-5 year old slots publicly funded, this varies greatly by age group. Just under a third of Oregon counties (31%) have more than 25% publicly funded slots for infants and toddlers, whereas over four-fifths of counties (89%) have more than 25% publicly funded slots for preschool-age children. Eleven counties (31%) have no public funding for infants and toddlers, whereas all counties have public funding for preschoolers. Likewise, only three counties (8%) have greater than 50% of their infant/toddler slots from public funding, compared to 16 counties (44%) for preschool-age children. It is important to note that a higher percentage of publicly funded slots does not equate to more public funding. Rather, it means that a higher percentage of the total supply in the county is publicly funded.

Figure 4

Percentage of Counties Ranked by Percentage of Publicly Funded Slots						
Percent Public Slots	0-2 years		3-5 years		0-5 years	
	N	%	N	%	N	%
0%	11	31%	0	0%	0	0%
0 - 25%	14	39%	4	11%	8	22%
25 - 50%	8	22%	16	44%	17	47%
Greater than 50%	3	8%	16	44%	11	31%
Total	36		36		36	

¹⁵ Oregon Child Care Research Partnership. (June, 2021). *2020 Early Care and Education Profiles for Oregon*. Corvallis, Oregon: Oregon State University, College of Public Health and Human Sciences. health.oregonstate.edu/early-learners/profiles

Map 2: Percent of Regulated Child Care Slots that are Publicly Funded by Age Group



For larger view of map, see page 17.

It is also important to note that non-metropolitan counties have a higher percentage of publicly funded slots than metropolitan counties¹⁶. Overall, 52% of slots for young children (0-5 years) in non-metropolitan counties are publicly funded, compared to 20% of slots in metropolitan counties. Although this remains the case when viewed by age groups, the percentage of publicly funded slots is a much smaller proportion of the supply for infants and toddlers (8% in metro, 33% in non-metro) than for preschool-age children (25% for metro, 58% for non-metro).

Publicly funded slots play an important role in supply adequacy. Examining the counties that are not child care deserts, most would become deserts without publicly funded slots. For infants and toddlers, the only county not a child care desert, Gilliam County, would be a desert without public slots. Likewise, of the 18 counties that are not preschool child care deserts, 15 would become deserts without publicly funded slots¹⁷. Public slots make up 17% to 94% of preschool slots in these counties. Only Deschutes, Multnomah, and Washington counties would continue to not be deserts without publicly funded slots.

How has the percentage of publicly funded child care slots changed from early 2020 to 2022?

Between early 2020 (pre-COVID) and 2022, increased state funding led to growth in the number of contracted slots offered by Oregon Prenatal to Kindergarten, Preschool Promise, and Baby Promise. Between 2020 and 2022, the total number of public slots throughout the state increased by 4,214 slots (831 infant/toddler slots, 3,383 preschool slots). This represents a 49%

¹⁶ Metropolitan and nonmetropolitan counties were defined using the U.S. Office of Management and Budget Core-Based Statistical Area classification, see footnote 7.

¹⁷ Counties that would become deserts without publicly funded slots include: Baker, Benton, Clatsop, Gilliam, Harney, Hood River, Jefferson, Josephine, Klamath, Lincoln, Malheur, Sherman, Umatilla, Wasco, and Wheeler. Only Deschutes, Multnomah, and Washington continue to not be deserts if publicly funded slots were not included.

increase for publicly funded infant/toddler slots and 30% increase for publicly funded preschool slots.

In 2022, two counties had public slots for infants and toddlers when previously they did not have any publicly funded slots for this age group in 2020 (Crook, Lake). Alternately, two counties that previously reported public slots for infants and toddlers no longer reported any slots in 2022 (Curry, Wallowa). Therefore, the total number of counties without any infant/toddler public slots was 11 in 2020 and 2022, compared to 16 counties in 2018. In addition, nine counties increased the overall number of infant/toddler slots compared to 2020, with six counties doubling (Coos, Deschutes, Douglas, Linn, Multnomah, Polk) and three counties more than tripling the number of public slots (Benton, Clackamas, Lane). Seven counties decreased the overall number of public slots for infants and toddlers, with most ranging from a 7-38% decrease in their total publicly funded infant/toddler slots.

For preschool public slots, 30 counties increased the overall number of public slots between early 2020 and 2022, with most ranging from an 8-73% increase, five counties doubling (Baker, Deschutes, Harney, Lake, Lincoln), and two counties tripling their public slots (Grant, Morrow). Six counties decreased the overall number of public preschool slots, with most ranging from a 1-18% decrease, with the exception of one county that experienced a 36% decrease in preschool public slots (Sherman).

Discussion

Many Oregon families with children age 0-5 years live in a child care desert. Almost all counties (35 of 36) are child care deserts for infants and toddlers and half of the counties (18 of 36) are child care deserts for preschool age children.

Having an inadequate supply is not a new problem in Oregon. Oregon continues to have less regulated supply than it did 20 years ago for children ages 0-13. The decline in slots in small home-based care settings is associated with a decline in the total supply of regulated care. The decline in small family (registered) slots had begun prior to 1999 and the number of slots has continuously declined since that time. The number of slots available in centers and large family (certified) child care homes continues to increase, but has not made up for the long-term decline in small home-based slots.

Two characteristics of child care supply provide insight into the adequacy of the supply, age group served and role of public funding. First, in terms of age-groups served, almost every Oregon county is a child care desert for infants and toddlers. Providers struggle to provide infant/toddler care, in part due to the high staffing levels needed to meet safety and developmental needs of very young children. Public funding has been primarily directed to preschool due to its proximity to kindergarten entrance. Yet the early years are critical to development, and many argue that waiting until preschool for public investment is not an effective way to support kindergarten readiness and family well-being.

In recognition of the need for infant and toddler slots, the Baby Promise pilot program was created by the Early Learning Division in 2019 and has funded over 250 slots in communities

across the state as of 2022. Although we see a 9% increase in the number of regulated infant/toddler slots between 2020-2022, all Oregon counties except one continue to be deserts, and many of them are extreme deserts, for this age group. Thus, more investment and creative problem solving is needed to address the inadequacy of infant/toddler child care across all Oregon counties. It is important to note that the supply is also inadequate for preschool-age children as well; half of Oregon counties continue to be deserts for preschool-age children. It is just that the supply is the least adequate for infants and toddlers, with only one slot for every six infant/toddlers compared to three slots for every preschooler.

Second, the percentage of slots that are publicly funded also plays an important role in shaping child care supply. The total supply in any county is made up of both publicly funded and non-publicly funded (market) slots. A larger market funded supply of child care is associated with larger populations and higher levels of household income and maternal education. Public funding is typically directed to areas where conditions for market care are weak. These targeted areas are in metropolitan and nonmetropolitan counties, but they make up a greater percentage of the slots in nonmetropolitan counties where the conditions to support market care are especially weak and thus the number of market slots is small.

When looking at the 18 counties that are not child care deserts for preschool-age children, there is a substantial difference in the percentage of slots that are publicly funded by metropolitan status. In general, publicly funded slots make up a larger percentage of total supply in nonmetropolitan than metropolitan counties. In the 12 non-metropolitan counties that are not deserts, 25-94% of their slots are publicly funded. In the five metropolitan counties that are not deserts, only 17-35% of their slots are publicly funded. Child care markets are stronger in metropolitan counties and thus the total number of slots is larger, and the percentage of publicly funded slots is smaller.

This study focuses on supply of child care and education; that is, across Oregon counties how many regulated slots does Oregon have in relationship to the number of children in an age group. Supply is a measure of how much child care is available in a community that families in that community could potentially access. As important as availability is, it is only one of a set of interrelated child care characteristics that are critical to making child care work for children and families. Affordability and quality are also important factors of accessibility. Child care slots may be available but not be accessible for many reasons, such as parents may not be able to afford the price, services may not be offered at times that align with parents' schedules, or the available care may not meet children's safety, developmental, or cultural needs. Having an adequate supply is not enough. For the child care system to effectively and equitably serve families, parents need child care to be available in locations and hours that work for them, affordable, and high quality so it meets their children's and families' needs.

Limitations

A limitation of this study is the geographical unit used. County was used because data were available on both supply and population for that geographical unit, and this also aligned with the 2018 and 2020 Reports. But as almost 30 years of market price surveys has demonstrated, a county typically contains multiple child care markets (a market is defined as a geographic area

that includes both those who seek and those who provide care)¹⁸. Multiple child care communities typically exist within a county. Additional analysis would benefit from the use of clusters of either zip codes or census tracts to better approximate child care communities.

In addition, the number of publicly funded slots is likely underestimated. Although the number of publicly funded slots not identified in the study is relatively small, it would be important that future studies include efforts to identify as many publicly funded slots as possible.

It is also worth noting that number of slots does not equal the number of children served. Some programs fill a slot with more than one child, as is the case of part-time or part-day enrollments. Available data capture the number of slots a program hopes to fill at any given moment, not the total number of children they hope to reach, or the number they actually serve. Thus, it is important to recognize that these findings address availability of *slots* and may not reflect the total number of children who can be *served* in Oregon's regulated child care and early education programs.

Finally, this report focuses on regulated care that is licensed by Oregon's Office of Child Care (OCC) within the Early Learning Division (ELD). Between 2018 and 2020 there was a notable shift in the number of facilities that moved from regulated to license-exempt status. This change can be attributed to a [2018 Rule change](#), which allows facilities run by other public agencies (e.g., K-12 schools) to be license-exempt with OCC. However, many of these license-exempt facilities continue to receive public funding that is administered or tracked by ELD (e.g., Preschool Promise, Oregon Prenatal to Kindergarten). Thus, we added exempt facilities with public slots into our definition of regulated supply for the 2020 and 2022 reports. Future work will benefit from additional exploration into the implications of how child care supply is defined.

Study Implications

Child care supply (i.e., child care desert status severity) varies by geography. The majority of Oregon counties are child care deserts for infants and toddlers, and half of Oregon counties are child care deserts for preschool-age children. These findings confirm parents' reports of supply inadequacies for young children and are consistent with those of prior studies both in Oregon and nationally. The study clarifies that issues of supply and public funding continue to be greater for infant/toddler than for preschool-age child care supply.

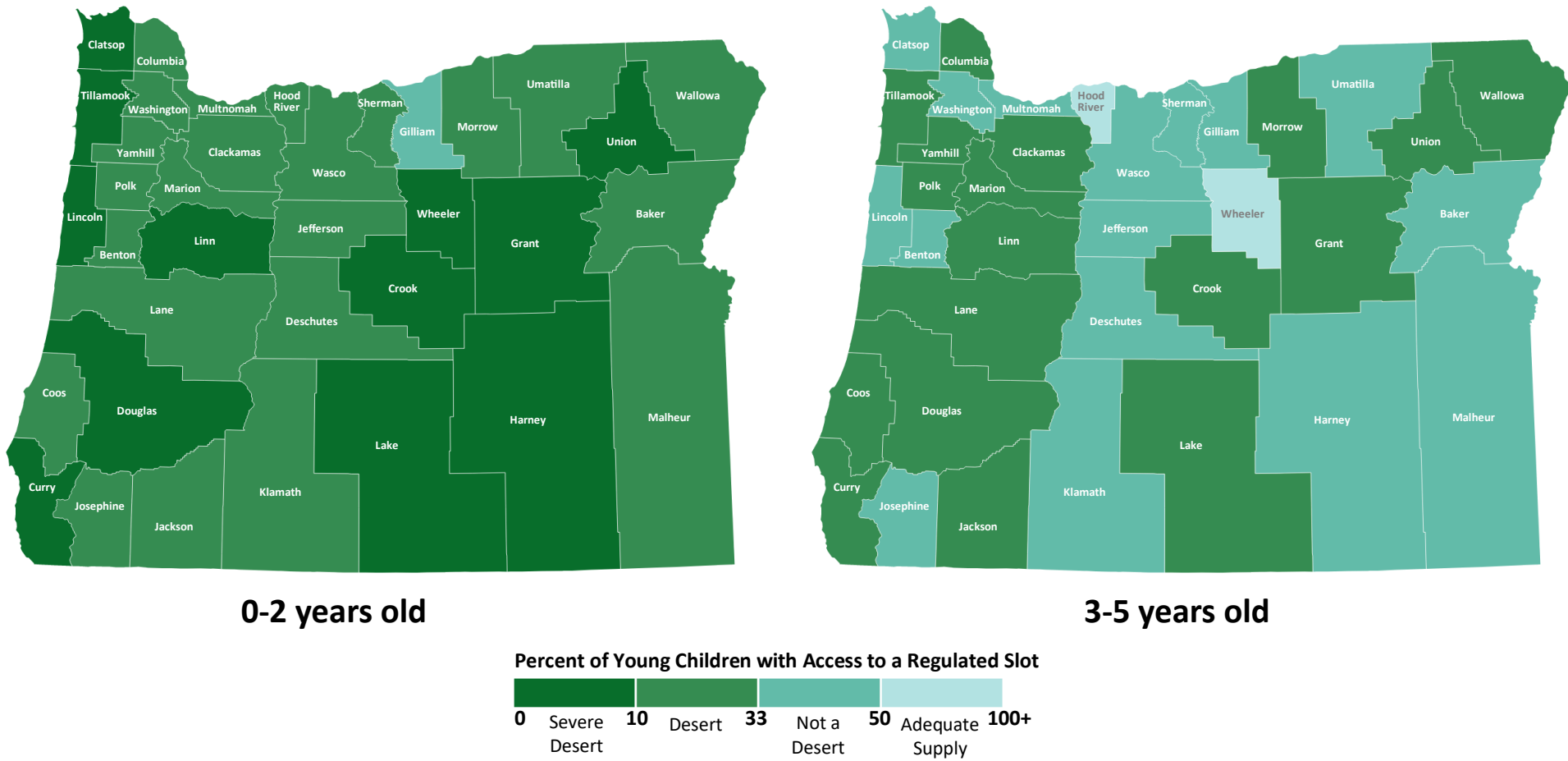
Systemic inequities in early childhood education and care have existed for a long time. These inequities have resulted in high quality, affordable child care being less accessible to families in currently and/or historically underrepresented or underserved communities. Leaders in Oregon and across the United States continue to work on solutions to stabilize and rebuild early childhood education and care – a fragile, inequitable system that was already facing a supply shortage, with some communities living in more severe child care deserts than others.

¹⁸ Grobe, D., Weber, R. B., Davis, E. E., Kreader, J. L., & Pratt, C. C. (2008). *Study of market prices: Validating child care market rate surveys*. Corvallis, OR: Oregon Child Care Research Partnership, Oregon State University. Retrieved from <https://health.oregonstate.edu/early-learners/research/study-market-prices-validating-child-care-market-rate-surveys>

Although the COVID-19 pandemic disrupted child care availability in Oregon as well as highlighted and exacerbated systemic inequities in the early care and education system, this report provides a picture of Oregon's recovery in child care supply as of late 2022. In early 2020, Oregon had 67,981 regulated child care slots for children ages 0-5 years prior to the COVID pandemic. In December 2022, Oregon had 71,153 regulated slots for children ages 0-5 years (5% increase), reflecting the efforts to stabilize and rebuild supply during the pandemic years.

Continued work to understand how supply and demand realities vary across different groups of families and different geographical regions of the state will be critical to informing and evaluating focused supply building efforts that strive to effectively and equitably meet the needs and preferences of *all* of Oregon's children and families.

Map 1: Percent of Young Children with Access to a Regulated Child Care Slot by Age Group

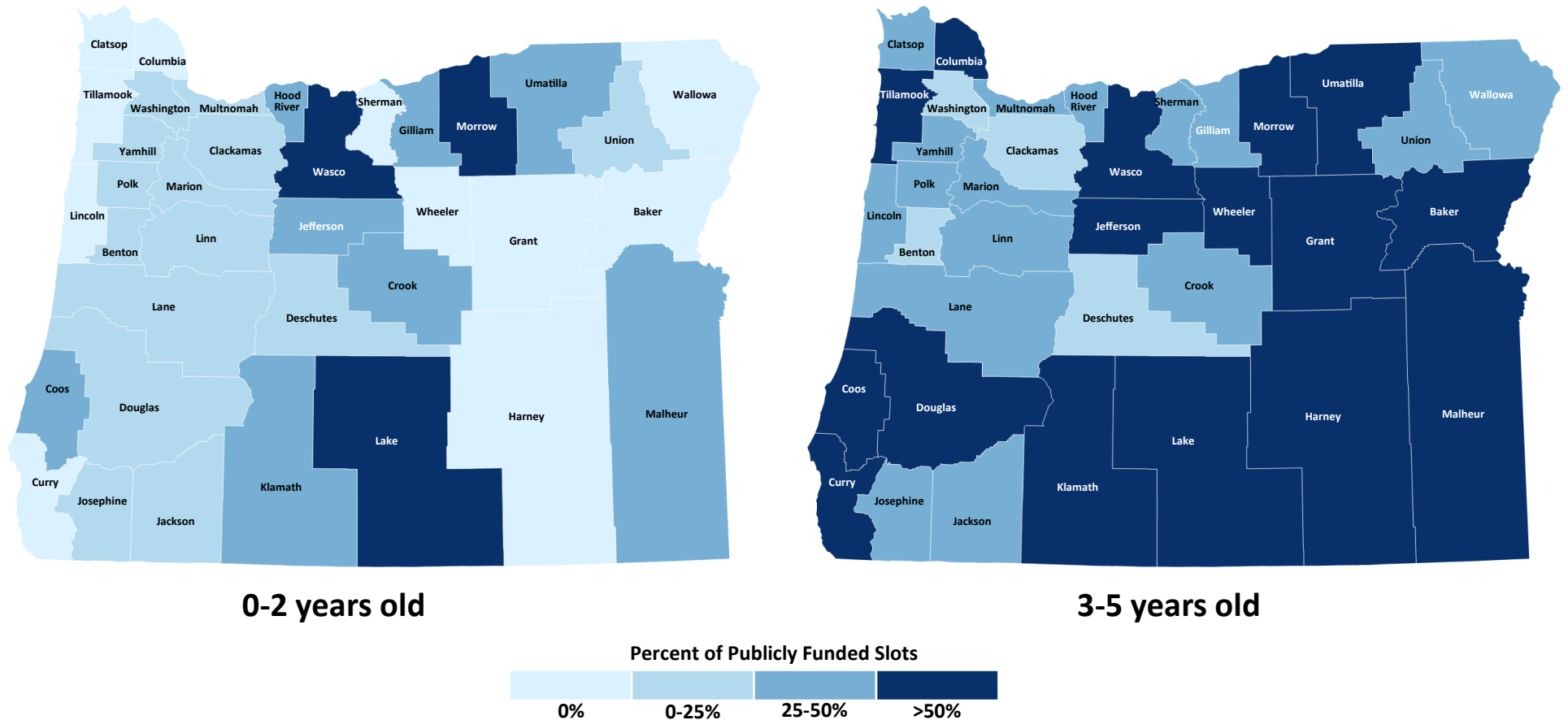


0-2 year olds includes children birth through the end of age 2. 3-5 year olds includes children 3 through the end of age 5.

Regulated child care slots includes slots in Certified Centers, Certified Family homes, Registered Family homes and Exempt programs that have public slots.

Data Information: Access to child care is calculated by taking the number of regulated child care slots for young children as of December 2022 (Estimated Supply of Child Care in Oregon, Oregon Child Care Research Partnership, Oregon State University) and dividing it by the population of children in the community who fall in the age group (2022 Annual Population Report Tables, Portland State University Population Research Center).

Map 2: Percent of Regulated Child Care Slots that are Publicly Funded by Age Group



0-2 year olds includes children birth through the end of age 2. 3-5 year olds includes children 3 through the end of age 5.

Regulated child care slots include slots in Certified Centers, Certified Family homes, Registered Family homes and Exempt programs that have public slots.

Data Information: Public slots for ages 0-5 include Oregon Prenatal to Kindergarten (Head Start Prekindergarten and Early Head Start), Preschool Promise, Baby Promise, Federal and Tribal Head Start, and Federal Migrant and Seasonal Head Start managed by the Oregon Child Development Coalition. Percentage of slots that are publicly funded is calculated by dividing the number of public slots by the total number of regulated slots as of December 2022 (Estimated Supply of Child Care in Oregon, Oregon Child Care Research Partnership, Oregon State University).

**Table 1. Percent of Children in County with Access to a Regulated Slot*
By Age Group**

A county is considered a child care desert if fewer than 33% of the county's children have access to a slot.

County	0-2 year olds	3-5 year olds	Total 0-5 year olds
Baker	11%	36%	24%
Benton	21%	38%	30%
Clackamas	20%	32%	26%
Clatsop	8%	41%	25%
Columbia	12%	29%	21%
Coos	14%	23%	19%
Crook	8%	30%	19%
Curry	4%	30%	17%
Deschutes	20%	43%	32%
Douglas	9%	26%	18%
Gilliam	35%	37%	36%
Grant	5%	23%	14%
Harney	4%	41%	23%
Hood River	25%	55%	40%
Jackson	12%	32%	22%
Jefferson	20%	42%	31%
Josephine	16%	35%	26%
Klamath	12%	42%	27%
Lake	3%	22%	13%
Lane	17%	33%	26%
Lincoln	8%	40%	25%
Linn	7%	20%	14%
Malheur	18%	36%	27%
Marion	12%	30%	21%
Morrow	14%	31%	23%
Multnomah	26%	50%	38%
Polk	17%	23%	20%
Sherman	21%	44%	32%
Tillamook	5%	20%	13%
Umatilla	15%	35%	25%
Union	9%	30%	20%
Wallowa	14%	33%	23%
Wasco	23%	43%	33%
Washington	23%	43%	33%
Wheeler	9%	73%	40%
Yamhill	16%	24%	20%
Oregon	18%	37%	28%

*Regulated includes Certified Centers, Certified Family, Registered Family Providers, and Exempt Providers who have public slots.

*0-2 includes children birth through the end of age 2; 3-5 includes children age 3 through the end of age 5.

Data sources: Access to child care is calculated by taking the Estimated Supply of Child Care in Oregon as of December 2022 (Analysis by Oregon Child Care Research Partnership, Oregon State University using data collected by the R&R system) and dividing it by the population of children in the county who fall in the age group (2022 Annual Population Report Tables, Portland State University Population Research Center)

**Table 2. Number and Percent of Public Slots By Age Group
for Regulated Programs***

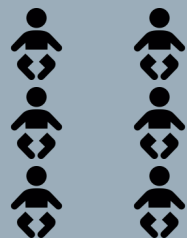
Public slots for ages five and under include Oregon Prenatal to Kindergarten, Early Head Start, Federal and Tribal Head Start, Oregon Child Development Coalition, Preschool Promise, and Baby Promise.

County	0-2 year olds			3-5 year olds			Total 0-5 year olds		
	Total Slots	Public Slots	Percent Public	Total Slots	Public Slots	Percent Public	Total Slots	Public Slots	Percent Public
Baker	51	0	0%	179	120	67%	230	120	52%
Benton	454	24	5%	847	141	17%	1,301	165	13%
Clackamas	2,400	211	9%	4,102	882	22%	6,502	1,093	17%
Clatsop	92	0	0%	472	173	37%	564	173	31%
Columbia	178	0	0%	471	247	52%	649	247	38%
Coos	244	89	36%	421	219	52%	665	308	46%
Crook	61	17	28%	246	104	42%	307	121	39%
Curry	18	0	0%	149	104	70%	167	104	62%
Deschutes	1,153	79	7%	2,547	479	19%	3,700	558	15%
Douglas	275	41	15%	856	449	52%	1,131	490	43%
Gilliam	18	6	33%	22	10	45%	40	16	40%
Grant	19	0	0%	85	59	69%	104	59	57%
Harney	10	0	0%	96	90	94%	106	90	85%
Hood River	206	72	35%	459	200	44%	665	272	41%
Jackson	799	93	12%	2,204	838	38%	3,003	931	31%
Jefferson	188	94	50%	404	322	80%	592	416	70%
Josephine	389	45	12%	877	310	35%	1,266	355	28%
Klamath	293	72	25%	1,025	574	56%	1,318	646	49%
Lake	8	8	100%	55	49	89%	63	57	90%
Lane	1,736	42	2%	3,469	1,042	30%	5,205	1,084	21%
Lincoln	91	0	0%	474	235	50%	565	235	42%
Linn	316	32	10%	877	304	35%	1,193	336	28%
Malheur	230	84	37%	461	373	81%	691	457	66%
Marion	1,451	232	16%	3,862	1,328	34%	5,313	1,560	29%
Morrow	71	53	75%	160	127	79%	231	180	78%
Multnomah	5,815	669	12%	11,427	2,816	25%	17,242	3,485	20%
Polk	471	101	21%	644	293	45%	1,115	394	35%
Sherman	14	0	0%	28	7	25%	42	7	17%
Tillamook	34	0	0%	153	91	59%	187	91	49%
Umatilla	433	215	50%	1,066	687	64%	1,499	902	60%
Union	72	8	11%	244	112	46%	316	120	38%
Wallowa	31	0	0%	74	35	47%	105	35	33%
Wasco	204	117	57%	388	233	60%	592	350	59%
Washington	4,425	104	2%	8,656	1,472	17%	13,081	1,576	12%
Wheeler	4	0	0%	30	25	83%	34	25	74%
Yamhill	533	20	4%	836	212	25%	1,369	232	17%
Oregon	22,787	2,528	11%	48,366	14,762	31%	71,153	17,290	24%

*In order to fully represent public slots, regulated includes Certified Centers, Certified Family, and Registered Family, and Exempt Providers who have public slots.

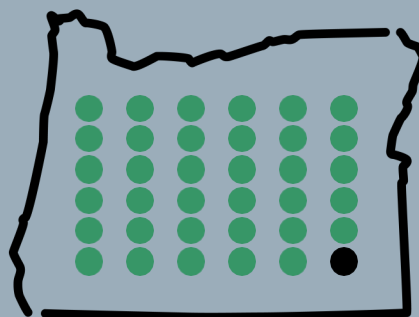
Data sources: The percentage of slots that are publicly funded is calculated by dividing the number of public slots in the programs listed above by the total number of regulated slots (Estimated Supply of Child Care in Oregon as of December 2022; Analysis by Oregon Child Care Research Partnership, Oregon State University using data collected by the R&R system)

Across Oregon, there is inadequate regulated child care supply - especially for infants & toddlers



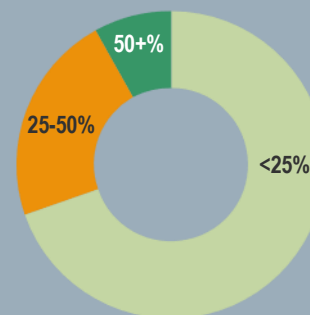
There are 6 infants & toddlers for a single child care slot in Oregon

A child care desert is a community with 3 or more children for a single child care slot.



Almost all Oregon counties are child care deserts for infants & toddlers

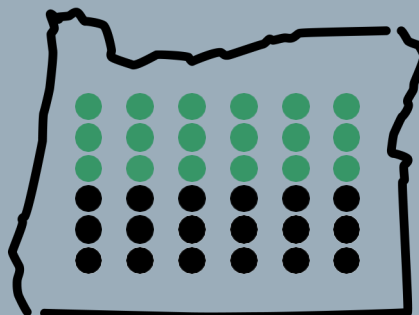
Public funding plays a major role in creating Oregon's child care supply – especially for preschoolers



70% of Oregon counties have fewer than 25% publicly funded regulated infant/toddler slots

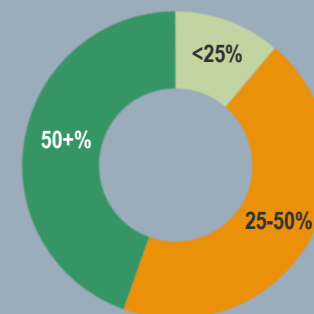


There are 3 preschool-age children for a single child care slot in Oregon



Half of Oregon counties are child care deserts for preschool-age children

Without publicly funded slots, all except 3 counties would be child care deserts.



Only 10% of Oregon counties have fewer than 25% publicly funded regulated preschool-age slots

Definitions: **Infants & toddlers** are 0-2 year olds. **Preschool-age children** are 3-5 year olds. **Regulated child care** includes certified centers, registered family homes, certified family homes, and exempt providers who have publicly funded slots. **Publicly funded slots** include Oregon Prenatal to Kindergarten, Early Head Start, Preschool Promise, Federal and Tribal Head Start, and Federal Migrant and Seasonal Head Start managed by Oregon Child Development Coalition.

*This report describes the supply of child care as of December 2022.

Reference: Oregon's Child Care Deserts 2022 Mapping Supply by Age Group and Percentage of Publicly Funded Slot, Oregon Child Care Research Partnership, Oregon State University.

Full report can be found at health.oregonstate.edu/early-learners/supply

For more information contact Oregon Child Care Research Partnership at oregonccrp@oregonstate.edu