# U.S. Child Day Care Services: An Industry Analysis

(7th Edition - May 2010)

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* Major report findings. Highlights of all chapters: Child care’s importance in the economy, industry definition, major trends & developments, industry status report, demand factors (birth rates, women in the workforce, etc.), industry structure (no. of facilities by type: family day care homes, group centers, church, military, colleges, hospitals, federal gov’t.- status of each), discussion of recession, consolidation, industry $ size & growth: 1990-2013 forecasts, 2008-2009 performance, taxable/tax-exempt sites, political and legislative outlook/funding for child care 2000-2010, typical fees/costs, 2009 revenues of top 6 companies, regulated child care home 1991-2007, by type, major indy. operating ratios, avg. receipts, payrolls, indy. 5-year balance sheet.

## The Political And Legislative Outlook For Child Care ($175) 43-64

* History and discussion of Federal child care assistance.
* History and recent funding/status of: Dependent Care Tax Credit, the Child Care Development Block Grant, Social Services Block Grant, Head Start, Child and Adult Care Food Program, Transitional Assistance for Needy Families.
* Discussion of 2009 expanded dependent care tax credit/family relief act
* Recent trends in state funding of Pre-K programs – discussion.

### Tables:

* Federal Programs That Support Child Care -definition
* Estimated Value of Child Care Tax Credit: 2000-2010F
* Child Care Development Block Grant Expenditures: 2000-2010
* Child and Adult Care Food Program Expenditures: 1998-2009
* Estimated Child & Adult Care Food Program Expenditures: 2000-2010
* Social Service Block Grant Expenditures: 1998-2007
* Estimated Social Services Block Grant Expenditures: 2000-2010
* Estimated Head Start Expenditures: 2000-2010
* TANF Appropriations and Expenditures: 2000-2006
* Estimated TANF Expenditures: 2000-2010
* Federal Expenditures for Child Care Related Services, by Type: 2000-2010
* Annual Percent Change in Federal Expended. for Child Care Services: 2001-2010
* Top 10 States by Total State Funding for Pre-K Programs: FY 1999 vs. 2009.
Discussion & analyses of:
* Demographic trends – summary & discussion of birth rates, delayed marriages, postponed childbearing, birth rate decline during the recession.


Tables:
* U.S. Annual Live Births and Birth Rate: 1980 to 2009
* **Fertility Rates** for Women by Age Cohort: 1990 to 2008
* Fertility Rates for Women by Age Cohort for Birth of First Child: 1990 to 2003
* U.S. Population, No. of Children under Age Six, and Projected Live Births: 2000-2010


In-depth discussion and analysis of these topics...
- Trends in child care arrangements
- Differences in child care arrangements based upon the age, education, income, and race of the family.
- Average weekly child care payments
- Differences in payments based upon the age, education, income, and race of the family.

15 detailed statistical Tables:
* Primary Child Care Arrangements of Preschoolers under age 5 living with mother, by employment status & select characteristics of mother: 2006 (by race, marital status, education, family income), by type/location of care
* Primary Child Care Arrangements by Employed Mothers of Preschoolers: 1985 to 1999 (by age, race, marital status, education – for all tables below)
* Child Care Arrangements for Preschoolers by Family Characteristics and Employment Status of Mother: Spring 1999
* Child Care Arrangements for Preschoolers by Family Characteristics and Employment Status of Mother for Employed Mothers: Spring 1999
* Primary Child Care Arrangements of Preschoolers of Employed Mothers: Spring 1999
* Primary Child Care Arrangements of Preschoolers of Employed Mothers: Spring 1999
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* Average Weekly Child Care Expenditures by Employed Mothers of Children Under 5: Spring 1999
* Average Weekly Child Care Expenditures by Employed Mothers of Children Under 14: Spring 1999
Discussion & analyses of:
* Census Bureau Estimates – positives and limitations
* Other Estimates of the Size of the Industry – by trade groups, brokerage firm analysts, 
  Natl. Child Care Assn., competitors
* Federal Child Care Expenditures - discussion
* Household Child Care Expenditures - discussion
* Estimated U.S. Child Care Expenditures
* Discussion of factors affecting revenues during 2008-2009 recession, 2010 outlook
* 2013 Forecast: discussion of rationale for growth, factors affecting revenue/demand.

Tables:
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* Estimated Annual Receipts for Taxable, Tax-Exempt, and Non-employer Child Care 
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* Historical Federal Child Care Expenditures: 1990-2010
* Estimated Federal Government Child Care Expenditures, by type program: 1990-2010
* Household Child Care Expenditures
* Annual Growth Multiplier for Household Child Care Expenditures – Marketdata rationale
* Estimated Household Child Care Expenditures: 1990-2010
* **Total estimated U.S. Child Care Expenditures: 1990-2010**
* Comparison of Estimates of Size of the Industry: Marketdata vs. other sources
* Projected child care employment outlook from 2008-2018, Dept. of Labor data

Industry Structure & Competition ($250)  
* Industry structure – Summary & discussion of no. of providers, by kind.
* Characteristics of Child Care Providers
* **Family day care**
* **Child Care Centers**
  * Estimated Number of Regulated Child Care Homes and Centers
  * Church-based Centers – status report
  * U.S. Military Facilities
* **Employer Sponsored Programs**
  * Community Service Organizations – YMCA’s role
  * Colleges & University-based care – status report
  * Hospital-based care – status report
  * Government Programs - – status report
* Discussion of family day care
* **Franchising** Activity in The Child Care Industry, list of top companies/outlets
* Typical Size and Operating Expenses of Child Care Centers

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* Estimated Number of Day Care Provider Sites By Type: 2009
* U.S. Census Bureau’s Estimate of the Number of Day Care Provider Sites, By 
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* Child Care Employment: 2002 to 2012F
* Median Hourly Earnings of Various Child Care Occupations: 2008
* Regulated Child Care Homes: 1991 to 2007
* 10 Largest For-Profit Child Care Companies: 2009
* Regulated Child Care Centers: 1993 to 2007
* Estimated Number of Regulated Child Care Homes and Centers: 2000-2010
* Average Annual Cost and Caregiver to Child Ratios in Dept. of Defense Child Development Centers
* Average Annual Cost Per Child in Dept. of Defense Family Child Care Homes
* Major Child Care Franchises (Entrepreneur magazine – costs, fees, no. of sites)
* Typical Child Care Center Size & Expenses, by Kind.

**The Cost of Child Care** ($100) 148-158

* Review/findings of NACCRRA 2009 report: Parents and the High Price of Child Care
* Review/findings of USDA 2008 report: Expenditures of Children by Families
* Census Bureau Survey of Income and Program Participation child care costs
* **Child care cost inflation.** BLS Consumer Price Index for Child Care and Nursery Schools, reasons for recent above avg. fee increases due to demand, women’s Workforce participation during recession, etc.
* Marketdata estimates of current and future child care costs

Tables:
* Estimated Annual Expenditures on a Child by 2-Parent Family, 2008, by income class
* Weekly Child Care Costs per Child, Employed Mothers with Children Under 5: 1991-99
* Comparison of the CPI for Child Care & Nursery Schools to Census SIPP Data
* Actual & Estd Annual Increases for the CPI for Child Care/Nursery Schools: 2000-2010
* Estimated Child Care Expenditures: 2000 to 2010
* **Projected Family Child Care Costs: 2005-2010**
* Projected Child Care Costs per Child: 2005-2010
* State child care costs: 50 states: 2008 $ price for care (infants, 4 yr. olds, school age)

**Nannies and Au Pairs** ($200) 159-178

Nannies & Nanny Agencies
* Nannies - Who Are They? – Demographics, typical duties, part-time babysitting demand grows, Status Report by head of INA, effects of the recession
* **The 2009 INA Nanny Salary and Benefits Survey**: major findings for salaries, employment, family profile, wages in select cities nationwide.
* Tax Issues
* Nanny Agencies – role & discussion of
* Nanny Surveillance - discussion of
* Estimated Number of Nannies
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Tables
* Number of Schedule H IRS Filings: 1995-2006
* Leading U.S. Nanny Agencies: name/address/phone
* Estimated Number of Nannies in the U.S. - 2000 to 2010

Au Pair Agencies
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* Participant and Host Family Qualifications
* Tax Considerations
* Effect of the recession
* Au Pair Agencies
* Estimated Number of Au Pairs

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* Typical Employer Child Care Benefits Provided
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* Private Industry Employer Assistance for Child Care: National Compensation Survey, March 2004
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* 12 Largest Child Care Management Organizations

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* Child Care In Health Care, survey of member center operations.
* Estimated Number of Hospital Sponsored Child Care Centers

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* Hospital Sponsored Child Care Centers: 1980-2000
* Estimated Number of Hospital Sponsored Child Care Centers: 2000-2010

**College-based Day Care**
* Current Trends, Summary, Discussion
* Findings of survey by National Coalition for Campus Child Care (type programs, age Of kids served, how center is funded, etc.)
Economic Operating Performance & Key Ratios ($300)  
(some establishment data not yet available from 2007 survey)

* Discussion of for-profit and non-profit establishments; aggregate and per establishment financials; legal form of organization; industry concentration; distribution of centers by size; and distribution of centers by state and metro area. Summary of 2007 data released vs. data coming later in 2010-2011.

16 Detailed Statistical Tables:
* Child Care Center Establishments and Receipts by Legal Form of Organization: 2002, 1997
* All Child Care Firms: Number of Establishments, by Receipts Size: 1997, 2002
* All Child Care Firms: Number of Establishments, by Receipts Size: 2002
* Industry Concentration by Top 50 Firms: Subject to Federal Taxes: 1992-2002
* 100 Largest Metro Areas - Ranked by No. of Non-Profit Child Care Centers: 2002

Profiles Of The Leading For-Profit Day Care Center Chains ($250)  
(In-depth profile covering: number of centers operated, company history, program descriptions, specializations, 2005-2010 financial performance, strategies, contracts, headquarters, mergers)

* Knowledge Learning Corp.
* Learning Care Group
* Bright Horizons Family Solutions
* Nobel Learning Communities
* Goddard Systems
* Child Development Schools

Reference Directory  
* Industry Trade Associations, Journals, Consultants, Other Sources

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