

U.S. CHILD DAY CARE SERVICES: AN INDUSTRY ANALYSIS

(7th Edition - May 2010)

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<p>* 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.</p>	
<u>The Political And Legislative Outlook For Child Care</u> (\$175)	43-64
<p>* History and discussion of Federal child care assistance.</p> <p>* 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.</p> <p>* Discussion of 2009 expanded dependent care tax credit/family relief act</p> <p>* Recent trends in state funding of Pre-K programs – discussion.</p>	
<p><u>Tables:</u></p> <p>* Federal Programs That Support Child Care -definition</p> <p>* Value of Child Care Tax Credits Filed On Individual Income Tax Returns: 1998-2007</p> <p>* Estimated Value of Child Care Tax Credit: 2000-2010F</p> <p>* Child Care Development Block Grant Expenditures: 2000-2010</p> <p>* Child and Adult Care Food Program Expenditures: 1998-2009</p> <p>* Estimated Child & Adult Care Food Program Expenditures: 2000-2010</p> <p>* Social Service Block Grant Expenditures: 1998-2007</p> <p>* Estimated Social Services Block Grant Expenditures: 2000-2010</p> <p>* Head Start Appropriations: 1998-2008</p> <p>* Estimated Head Start Expenditures: 2000-2010</p> <p>* TANF Appropriations and Expenditures: 2000-2006</p> <p>* Estimated TANF Expenditures: 2000-2010</p> <p>* Federal Expenditures for Child Care Related Services, by Type: 2000-2010</p> <p>* Annual Percent Change in Federal Expend. for Child Care Services: 2001-2010</p> <p>* Top 10 States by Total State Funding for Pre-K Programs: FY 1999 vs. 2009.</p>	

Discussion & analyses of:

* Demographic trends – summary & discussion of birth rates, delayed marriages, postponed childbearing, birth rate decline during the recession.

Women in the Work Force – discussion of trends.

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

* Labor Force Participation Rates: 1990-2008

* Labor Force Partic. Rates of Women by Presence/Age of Youngest Child: 1990-2008

Highlights of survey: "Who's Minding the Kids? (Spring 2005 –latest avail.), 1999 Census survey: "Who's Minding the Kids? & 2006 study: "Who's Minding The Kids in the Summer?"

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

* Weekly Child Care Payments by Families with Employed Mothers of Children Under 5: Spring 1999

* 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

Size & Growth Of The Industry (\$200)

109-123

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:

- * Estimated Annual Receipts for Taxable/Tax-Exempt Child Care Firms: 1986-2008
- * Estimated Annual Receipts for Taxable, Tax-Exempt, and Non-employer Child Care Firms: 1997-2007
- * Comparison of Estimates of the Size of the Child Care Industry
- * 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)

124-147

- * 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

Tables:

- * 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 Taxable vs. tax-exempt vs. non-employer establishments: 2007
- * 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 NACCRRRA 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 Family Child Care Costs** for Employed Mother, Kids Under 5: 1991-2005
- * Weekly Child Care Costs per Child, Employed Mothers with Children Under 5: 1991-99
- * Comparison of the Consumer Price Index: All Items Vs. Child Care & Nursery Schools: 1991-2010 1st qtr.
- * 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
- * The Major Industry Trade Groups – name/address

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

- * Au Pairs: Who Are They? – Demographics, typical duties
- * Participant and Host Family Qualifications
- * Tax Considerations
- * Effect of the recession
- * Au Pair Agencies
- * Estimated Number of Au Pairs

Tables

- * U.S. Dept. of State Designated Au Pair Sponsors: name/address/phone
- * Estimated Number of Au Pairs in the U.S.: 2000 to 2010

Employer-Sponsored Child Care - Status Report (\$200)

179-196

Discussion & analyses of:

- * Current Trends, status report by Exchange magazine
- * Typical Employer Child Care Benefits Provided
- * Bureau of Labor Statistics National Compensation Survey: 2009 survey findings
- * Estimated Number of Employer Based Child Care Centers

Tables

- * Private Industry Employer Assistance for Child Care: 1999-2005
- * Private Industry Employer Assistance for Child Care: National Compensation Survey, March 2004
- * Estimated Number of Employer Based Child Care Centers: 2000-2010
- * 12 Largest Child Care Management Organizations

Church-based Day Care Services

- * Overview & discussion, role.
- * Estimated Number of Church-Housed Child Care Centers

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- * 10 Largest Religious Organizations Housing Early Childhood Facilities in the US
- * Estimated Number of Church Housed Child Care Centers: 2000 to 2010

Hospital-based Day Care

- * Current Trends, Summary, Discussion
- * Child Care In Health Care, survey of member center operations.
- * Estimated Number of Hospital Sponsored Child Care Centers

Tables:

- * 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)

197-223

- * Review of the Census of Service Industries from 1992, 1997, 2002, 2007
- * 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.
- * **Industry balance sheet and income statements** and select business ratios – discussion of industry’s financial health: 2005-2009

16 Detailed Statistical Tables:

- * Child Care Centers: **Number of Establishments**, Annual Receipts, and Annual Payroll: 1992, 1997, 2002, 2007
- * Child Care Centers: Number of Establishments, Average Annual **Receipts per Establishment**, and Average Annual Payroll: 1992, 1997, 2002, 2007
- * 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
- * Industry **Concentration by Top 50 Firms**: Exempt, Federal Taxes: 1992-2002
- * Estabs. & Receipts of Firms Subject to Federal Income Tax, **by State**: 1997, 2002
- * Estabs. & Receipts of Firms Exempt from Federal Income Tax, **by State**: 1997, 2002
- * **100 Largest Metro Areas** - Ranked by No. of Non-Profit Child Care Centers: 2002
- * RMA Annual Statements, Industry **Balance Sheets/Income Statements**: 2005-2009
- * RMA Annual Statements, Industry **Balance Sheets/Income Statements**: By company size: 2005-2009
- * RMA Annual Statements, **Key Financial Ratios**: 2005-2009.

Profiles Of The Leading For-Profit Day Care Center Chains (\$250)

224-243

(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

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- * Industry Trade Associations, Journals, Consultants, Other Sources