



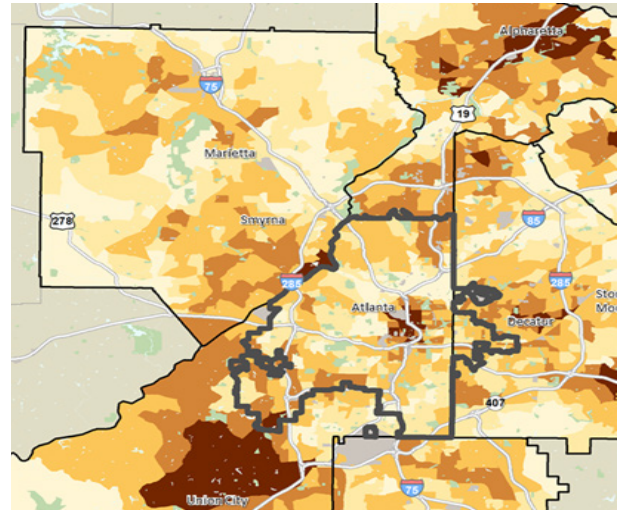
REINVESTMENT  
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# Child Care Access in Metro Atlanta

Prepared by **REINVESTMENT FUND**

Published **AUGUST 2022**



## RESEARCH CONDUCTED BY

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This work was supported by the GEEARS: Georgia Early Education Alliance for Ready Students, with additional support from the Goizueta Foundation. The opinions expressed in this report are those of the authors and do not necessarily reflect the views of GEEARS or the Goizueta Foundation.

High-quality early care and learning is a critical piece of community infrastructure. Access to high-quality child care not only helps prepare children for success in school and beyond, but also enables parents to participate in the workforce or pursue their own education. This report summarizes the third analysis of child care shortages in the five-county metro Atlanta region (Clayton, Cobb, DeKalb, Fulton, and Gwinnett counties), hereafter ‘five-county region.’

Since 2017, funders, practitioners, and advocates have been using this data on child care supply and shortages to make informed decisions about where resources and interventions are needed most. The analysis and mapping described in this report were designed to complement existing tools and initiatives in the region to increase access to high-quality child care. (You can find our previous studies from 2017 and 2018 [here](#)).

One of the largest changes since the first analysis was conducted in 2017 is the continued implementation of Georgia’s Quality Rating and Improvement (QRIS) system, known as “Quality Rated.” In 2017 the state’s QRIS program was still relatively new, with a small percentage of programs participating and even fewer having received a rating. By the end of 2021, all child care providers accepting subsidies were required to be Quality Rated. This policy change increased participation in the program, but also perhaps, has impacted where Quality Rated capacity is concentrated. Today, Georgia’s QRIS is much more mature, and the number and share of programs that participate and have been rated has expanded substantially.

Understanding the location of child care supply and Quality Rated programs is just one of the important inputs policymakers and stakeholders should consider when designing programs to address access to child care. To that end, this report also includes an analysis looking at how child care shortages impact families at different income levels and how shortages impact areas that employ lower-income workers.

This report describes the major findings of the 2022 analysis and changes since the previous study in 2018. While the body of the report focuses on the five-county region, Appendix A describes trends within the City of Atlanta.

## Summary of Major Findings

- **The region has child care capacity for roughly two-thirds of its children under five-years old.** The 2022 study estimated a maximum potential demand for child care of 259,000, compared with a supply of about 174,500. This equates to roughly one and a half children for every seat.
- **The capacity in Quality Rated providers has grown substantially but is still inadequate to meet the needs of families.** The number of providers in the five-county region that were Quality Rated nearly doubled between 2018 and 2022, leading to an increase in Quality Rated capacity of nearly 48,000. This was largely driven by existing programs that changed their status rather than new programs. Despite the increase, Quality Rated capacity in the region is only sufficient to serve one-third of the region’s potential demand for child care.

- **Child care gaps impact all income groups, but a larger share of children in low- and moderate-income areas are affected by shortages in child care.** Areas with the largest child care shortages existed in both high- and low-income areas, but a larger proportion of children in low-income areas were living in block groups classified as having high shortages. One-third of children living in block groups with median family incomes below \$60,000 were in high-shortage areas, compared with just 19% of children in block groups with family incomes over \$100,000.
- **The region’s Hispanic population is disproportionately impacted by child care shortages.** Across the region, 30% of block groups were classified as having large shortages. But among areas with a high concentration of Hispanic residents, 48% had child care shortages.

## Methods and Analysis

The Child Care Analysis described in this report has three primary steps: (1) Estimating Demand; (2) Estimating Supply; and (3) Estimating Gaps. Each step in the analysis is conducted at the Census Block Group level – a Census-defined area that represents roughly six city blocks and is home to between 600 and 3,000 residents. Demand, supply, and shortage estimates were created for all 1,723 block groups in the five-county region.

This section provides a short overview of our analysis.<sup>1</sup>

### Estimating Demand

There are multiple approaches researchers have used to estimate the demand for child care. Some approaches seek to calculate the number of young children currently using or enrolled in child care. Others seek estimates of the population eligible to use care. We refer to our demand estimate as “Maximum Potential Demand” because it represents the total number of children ages 0 – 5 that might seek care in a specific area. This includes both children living in the five-county region and a smaller number of children who live elsewhere but might commute with parents to seek care in the region.

### Estimating Supply

Supply refers to the total capacity of full-time child care across the five-county region. There is no single source of data that accurately describes the supply of child care. This analysis uses multiple data sources, both local and national, to present the most comprehensive picture of supply, including: state licensing data, accrediting agency databases, and Atlanta-area extracts from national business listings.

This report calculates three types of supply:

- Total Supply, which represents all full-time providers in the region (both regulated and unregulated programs);
- Regulated Supply, which represents state-licensed providers and providers that are specifically exempt from state licensing requirements; and
- Quality Rated Supply, which estimates the capacity among providers that participate in the state’s Quality Rated program.

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<sup>1</sup> For more information about methods and data sources, see Reinvestment Fund’s 2018 Child Care Analysis for Metro Atlanta Report: [https://www.reinvestment.com/wp-content/uploads/2022/02/ReinvestmentFund\\_Report\\_Atlanta\\_Childcare\\_Report\\_2\\_2018-1.pdf](https://www.reinvestment.com/wp-content/uploads/2022/02/ReinvestmentFund_Report_Atlanta_Childcare_Report_2_2018-1.pdf)

Of those providers that receive an exemption from the state for licensing, the regulated supply analysis described here only includes license-exempt providers in exemption category 1 (government run or operated program), category 3 (private K-12 schools serving children under five), category 4 (private schools with a curriculum for four year-olds), and category 14 (child care programs run by a religious organization).<sup>2</sup>

## Estimating Shortages

This report describes two measures of child care shortage. First, absolute gaps represent the raw difference between our demand and supply measures. This measure can be interpreted as the additional program capacity that would be needed to ensure all children under five in the region could use child care. Because not all families choose to use child care, this represents an upper-bound estimate of child care shortages. Second, relative gaps identify areas with the largest gaps between child care supply and demand in the region. This measure accounts for the fact that not all families use child care. It is intended to highlight areas where, relative to the region's market for child care, the gap between supply and demand is especially large or small.

## Child Care Supply in the Five-County Region

In 2022, we estimate that the five-county region had child care capacity for 174,513 children. The majority of the region's capacity was located in licensed programs (90%), with smaller shares in license-exempt (1%) and unregulated programs (9%).<sup>3</sup>

The table below summarizes child care capacity across each of the five counties in 2022. Child care capacity largely tracked with each county's population under five. The greatest capacity was located in Fulton County, which had the highest population under five, while Clayton County had the population of children and lowest capacity in the region.

**Table 1: Child Care Capacity in Atlanta Five-County Region**

|                                      | Clayton<br>County | Cobb<br>County   | DeKalb<br>County | Fulton<br>County | Gwinnett<br>County | Total<br>Capacity         |
|--------------------------------------|-------------------|------------------|------------------|------------------|--------------------|---------------------------|
| <b>Licensed<br/>Providers</b>        | 12,036<br>(93%)   | 27,433<br>(87%)  | 31,514<br>(89%)  | 51,565<br>(90%)  | 33,747<br>(90%)    | <b>156,295<br/>(90%)</b>  |
| <b>License Exempt<br/>Providers</b>  | 80<br>(1%)        | 395<br>(1%)      | 448<br>(1%)      | 891<br>(2%)      | 396<br>(1%)        | <b>2,210<br/>(1%)</b>     |
| <b>Unregulated<br/>Providers</b>     | 838<br>(6%)       | 3,854<br>(12%)   | 3,395<br>(10%)   | 4,764<br>(8%)    | 3,157<br>(8%)      | <b>16,008<br/>(9%)</b>    |
| <b>Total Child Care<br/>Capacity</b> | 12,954<br>(100%)  | 31,682<br>(100%) | 35,357<br>(100%) | 57,220<br>(100%) | 37,300<br>(100%)   | <b>174,513<br/>(100%)</b> |
| <b>Population<br/>Under Five</b>     | <b>21,844</b>     | <b>46,108</b>    | <b>51,868</b>    | <b>61,923</b>    | <b>61,685</b>      | <b>243,428</b>            |

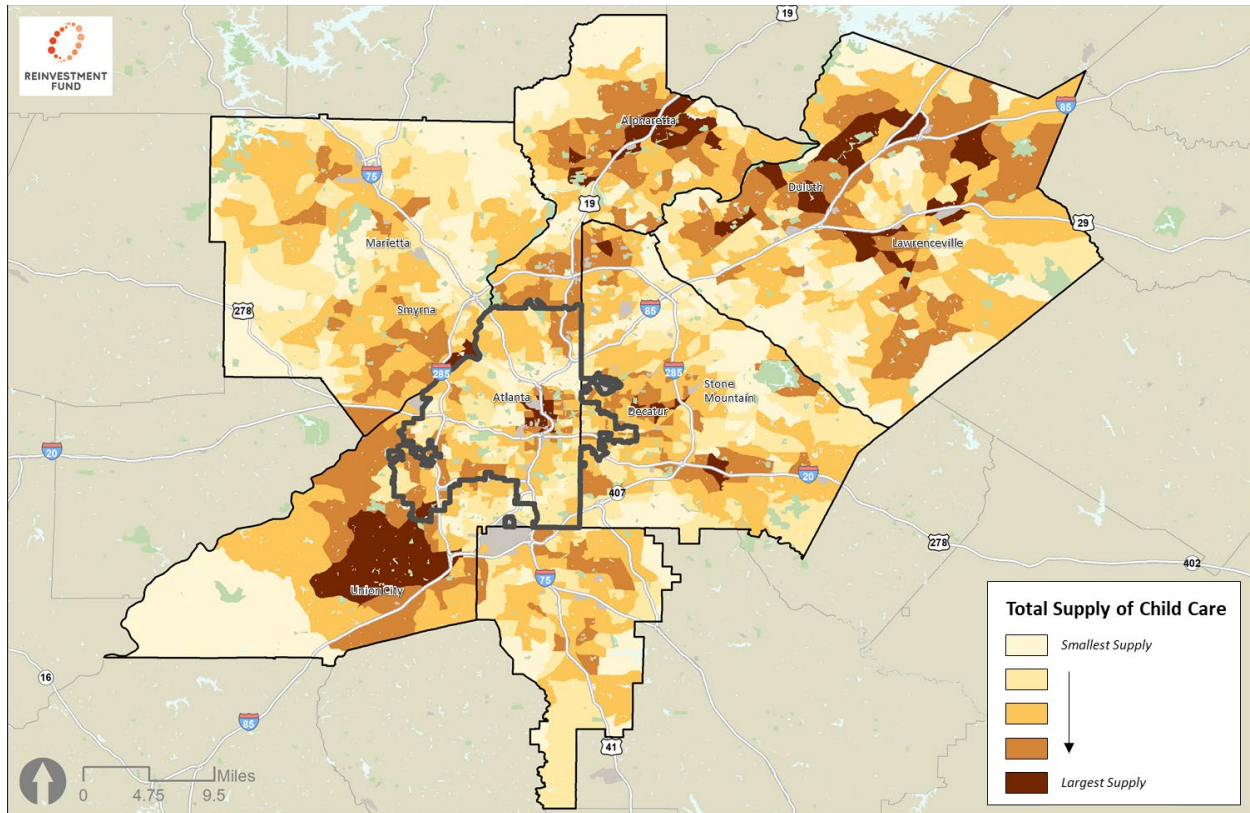
<sup>2</sup> Although Category 3 Exempt programs do not explicitly include younger children, the 18 EX-3 schools included in the analysis were confirmed to offer full-day care to children under the age of five.

<sup>3</sup> This analysis relied on license capacity as a proxy for child care supply or program capacity. While the two figures are related, license capacity refers to the maximum number of children a program is allowed to serve in their facility, rather than the actual number of children served or planned to serve. As such it is likely an upper-bound estimate of regional supply.



There was also substantial variation within each county. The map below shows the total child care capacity within a half mile of each block group in the region. The highest level of capacity was located in Atlanta and near Alpharetta, Duluth, Decatur, and Union City.

**Figure 1: Total Supply of Child Care**



A group of local stakeholders helped design the methodology for the first child care analysis. In addition to understanding trends in total capacity, stakeholders were also interested in understanding the location of regulated supply (only those sites with a DECAL license or specific license exemptions) and Quality Rated supply (only sites that were rated under DECAL's QRIS). The maps below show the location of regulated and Quality Rated supply across the region.

While the location of regulated supply largely mirrored total supply, Quality Rated supply was much more concentrated in the areas around Union City and Lawrenceville.

Figure 2: Regulated Supply of Child Care

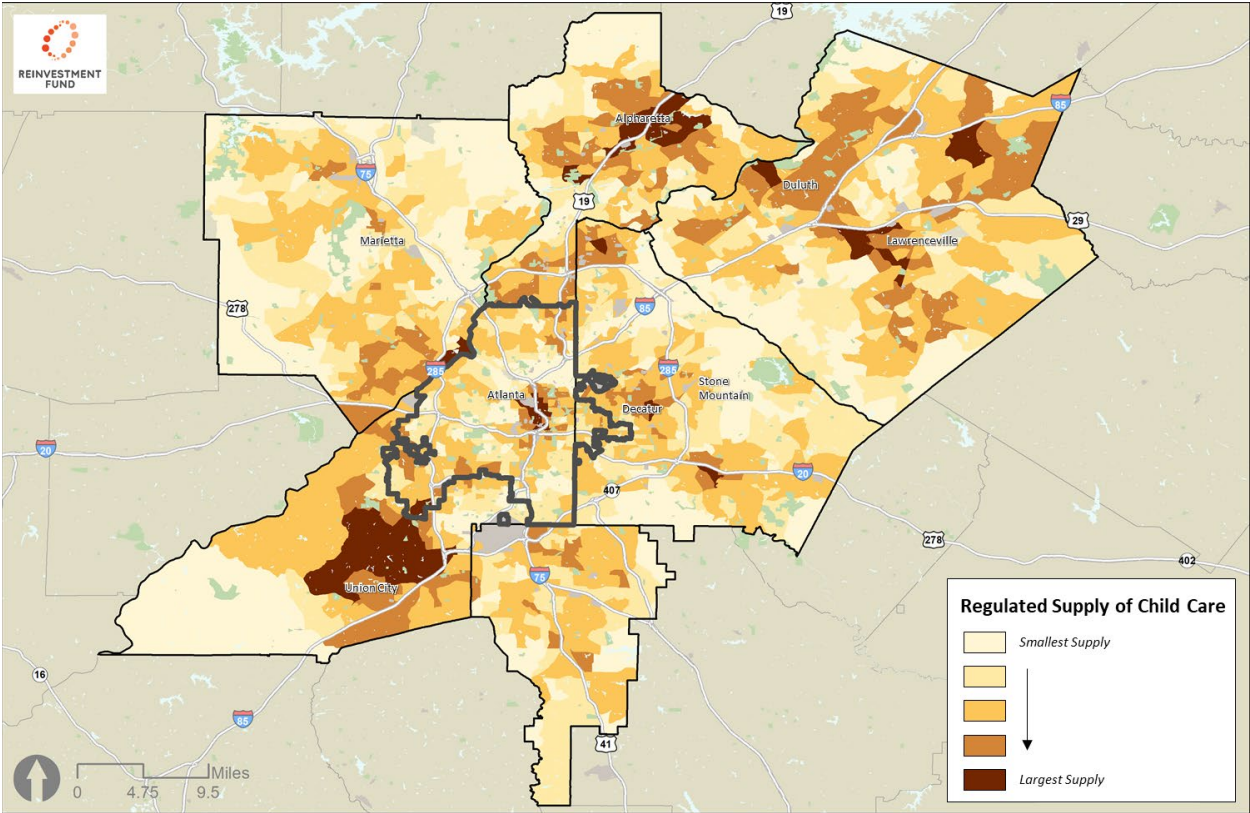
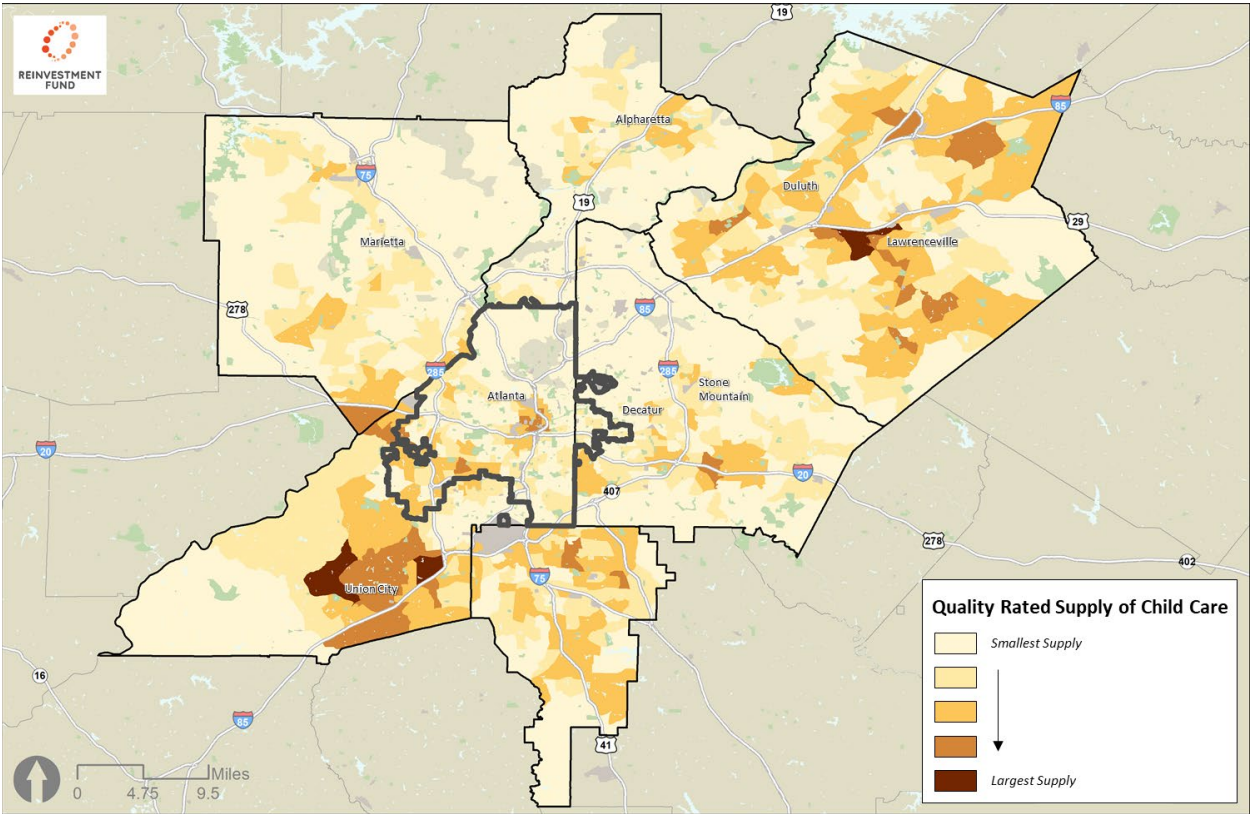


Figure 3: Quality Rated Supply of Child Care



## Changes in Child Care Supply Since 2018

Since the previous child care analysis was completed in 2018, the overall child care capacity across the five-county region has been largely stable. Total capacity increased by just 119 between 2018 and 2022, but the composition of the region's child care supply has changed substantially.

Although in the aggregate, regionwide capacity was relatively stable between 2018 and 2022 capacity in license-exempt and unregulated providers declined by 543 and 3,975, respectively. At the same time licensed capacity, particularly Quality Rated capacity, increased substantially. Total licensed capacity increased by 4,637, while Quality Rated capacity nearly doubled from 49,627 in 2018 to 97,560 in 2022 as programs shifted status from participating-but-not-yet-rated to rated.

The growth of Quality Rated sites and capacity reflects the growing maturity of the Georgia's QRIS system and the state's mandate that all providers accepting subsidies participate in Quality Rated.

**Table 2: Change in Child Care Capacity by Provider License Type, 2018 to 2022**

|   | 2018           | 2022           | Chg.          |
|---|----------------|----------------|---------------|
| <b>All Licensed</b>                       | <b>151,658</b> | <b>156,295</b> | <b>+4,637</b> |
| Not Participating in Quality Rated        | 41,152         | 31,467         | -9,685        |
| Participating in Quality Rated: Not Rated | 60,879         | 27,259         | -33,620       |
| Participating in Quality Rated: Rated     | 49,627         | 97,569         | +47,942       |
| <b>License-Exempt</b>                     | <b>2,753</b>   | <b>2,210</b>   | <b>-543</b>   |
| Government Run (EX-1)                     | 96             | 191            | +95           |
| Private School (EX-3/4)                   | 1,735          | 1,399          | -336          |
| Religious Program (EX-14)                 | 922            | 620            | -302          |
| <b>Unregulated</b>                        | <b>19,983</b>  | <b>16,008</b>  | <b>-3,975</b> |
| <b>Total</b>                              | <b>174,394</b> | <b>174,513</b> | <b>+119</b>   |

The table below describes changes in total capacity and Quality Rated capacity across each county in the region between 2018 and 2022. While every county has seen an increase in Quality Rated capacity, only two counties (DeKalb and Fulton) experienced an increase in overall capacity. The largest decline in total capacity occurred in Gwinnett County, which saw capacity decline by nearly 2,600 between 2018 and 2022.

**Table 3: Change in Total and Quality Rated Capacity, by County, 2018 to 2022**

|                         | Total Capacity |                |                 | Quality Rated Capacity |               |                 |
|-------------------------|----------------|----------------|-----------------|------------------------|---------------|-----------------|
|                         | 2018           | 2022           | Change, 18 - 22 | 2018                   | 2022          | Change, 18 - 22 |
| <b>Clayton County</b>   | 13,682         | 12,954         | -728            | 5,736                  | 10,089        | +4,353          |
| <b>Cobb County</b>      | 31,951         | 31,682         | -269            | 7,537                  | 16,692        | +9,155          |
| <b>DeKalb County</b>    | 33,937         | 35,357         | +1,420          | 8,639                  | 17,513        | +8,874          |
| <b>Fulton County</b>    | 54,863         | 57,220         | +2,357          | 13,186                 | 27,297        | +14,111         |
| <b>Gwinnett County</b>  | 39,961         | 37,300         | -2,661          | 14,529                 | 25,978        | +11,449         |
| <b>Total Regionwide</b> | <b>174,394</b> | <b>174,513</b> | <b>+119</b>     | <b>49,627</b>          | <b>97,569</b> | <b>+47,942</b>  |



In addition to an increase in Quality Rated capacity, the region saw a shift from unregulated to regulated capacity. The table below describes total capacity in regulated programs (programs with a DECAL license or an exemption) and unregulated programs (programs without a license or specific exemption). Unregulated capacity has always been a small part of the region's total supply of child care, but continues to decline as a share of the overall child care capacity. DeKalb and Fulton Counties both saw substantial increases in regulated capacity, while unregulated capacity declined.

**Table 4: Change in Regulated and Unregulated Capacity, by County, 2018 to 2022**

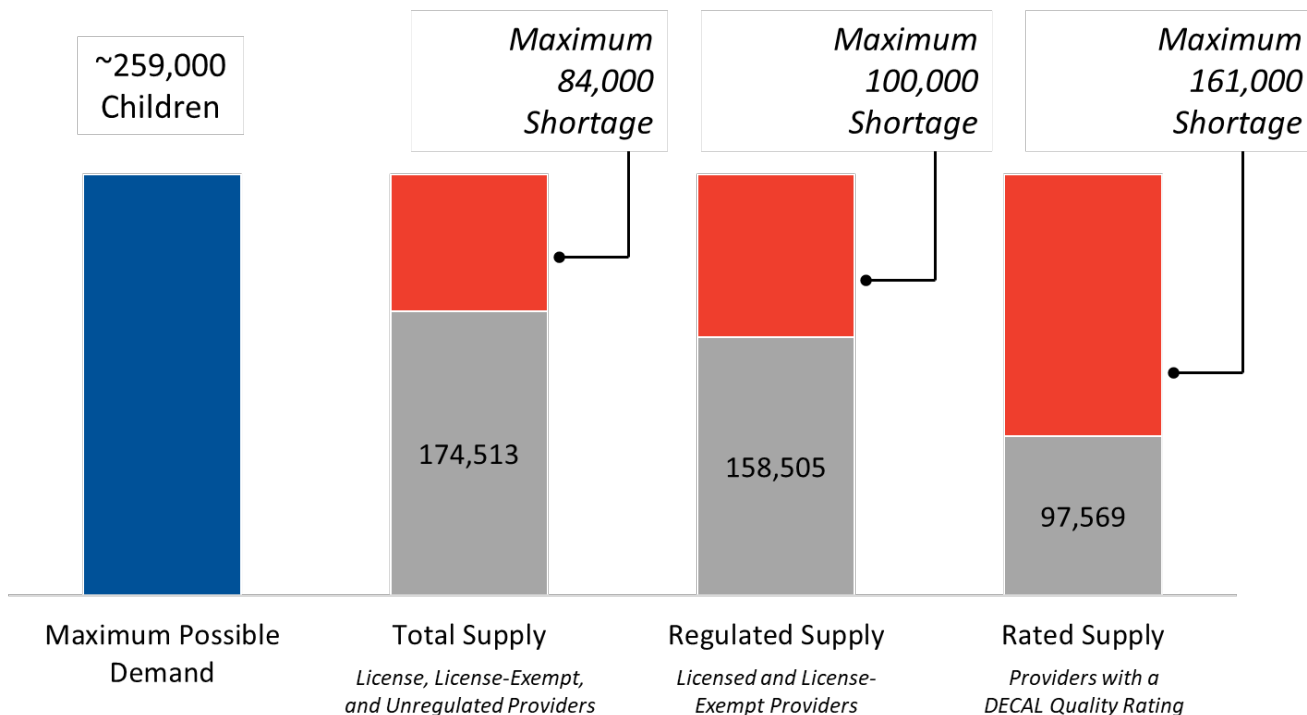
|                         | Regulated Capacity |                |                            | Unregulated Capacity |               |                            |
|-------------------------|--------------------|----------------|----------------------------|----------------------|---------------|----------------------------|
|                         | 2018               | 2022           | <i>Change,<br/>18 - 22</i> | 2018                 | 2022          | <i>Change,<br/>18 - 22</i> |
| <b>Clayton County</b>   | 11,867             | 12,116         | +249                       | 1,815                | 838           | -977                       |
| <b>Cobb County</b>      | 28,327             | 27,828         | -499                       | 3,624                | 3,854         | +230                       |
| <b>DeKalb County</b>    | 29,710             | 31,962         | +2,252                     | 4,227                | 3,395         | -832                       |
| <b>Fulton County</b>    | 49,327             | 52,456         | +3,129                     | 5,536                | 4,764         | -772                       |
| <b>Gwinnett County</b>  | 35,180             | 34,143         | -1,037                     | 4,781                | 3,157         | -1,624                     |
| <b>Total Regionwide</b> | <b>154,411</b>     | <b>158,505</b> | <b>+4,094</b>              | <b>19,983</b>        | <b>16,008</b> | <b>-3,975</b>              |

## Child Care Shortages in the Five-County Region

Across the region, there is a gap between the number of children and the capacity in full-time child care. In 2022, we estimate there are approximately 259,000 child care aged children in the region, but a capacity of only 174,500, leaving a shortage of 84,500. In other words, the existing level of child care supply leaves roughly one-third of the region's demand potentially unmet. We refer to these calculations as the absolute gap: the difference between maximum possible demand and supply.

Restricting our calculation of absolute shortages to regulated supply or only supply in Quality Rated programs identifies even larger gaps. The figure below compares the maximum possible demand in the region with the capacity in all sites (total supply), regulated programs, and Quality Rated programs. Red bars show the shortage that would occur if every child in the region sought child care. With a capacity of only 97,500 in Quality Rated programs, for example, the region has a shortage of 161,000 in Quality Rated programs.

**Figure 4: Absolute Shortages in Total Supply, Regulated Supply, and Quality Rated Supply, 2022**

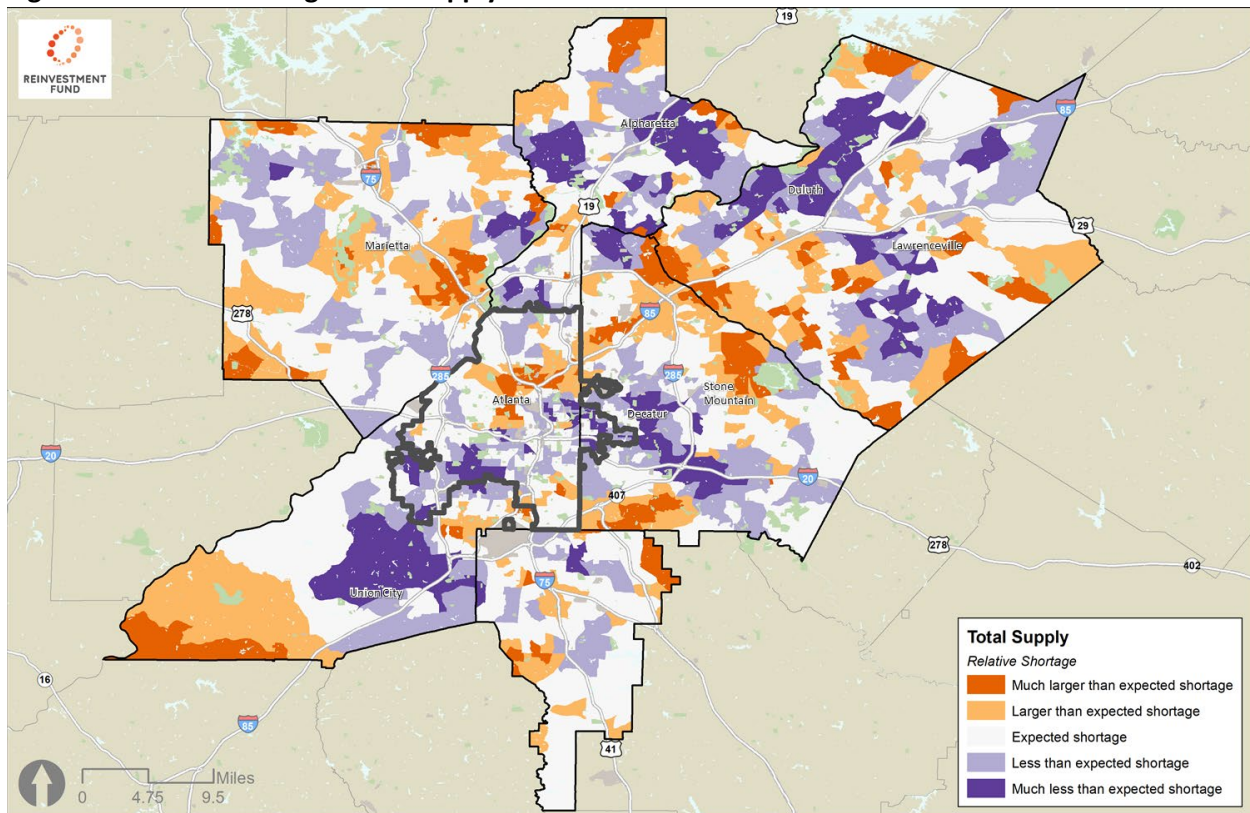


Of course, not all families use or want out-of-home child care. Supplying one space in child care for every child may not be an ideal policy outcome since families have various reasons for choosing to use or not use child care. To help guide supply building and quality improvement interventions, Reinvestment Fund also calculated the relative shortage of child care across the region.

The relative shortage identifies areas where, relative to the region, the gap between supply and demand is especially large. The measure is based on the idea that, while child care is not a perfectly efficient market, providers generally have some information about market demand and make decisions about where to locate to meet demand. Using this information, the relative shortage measure identifies areas where, given the existing level of demand, we would expect to see more supply than is currently available.

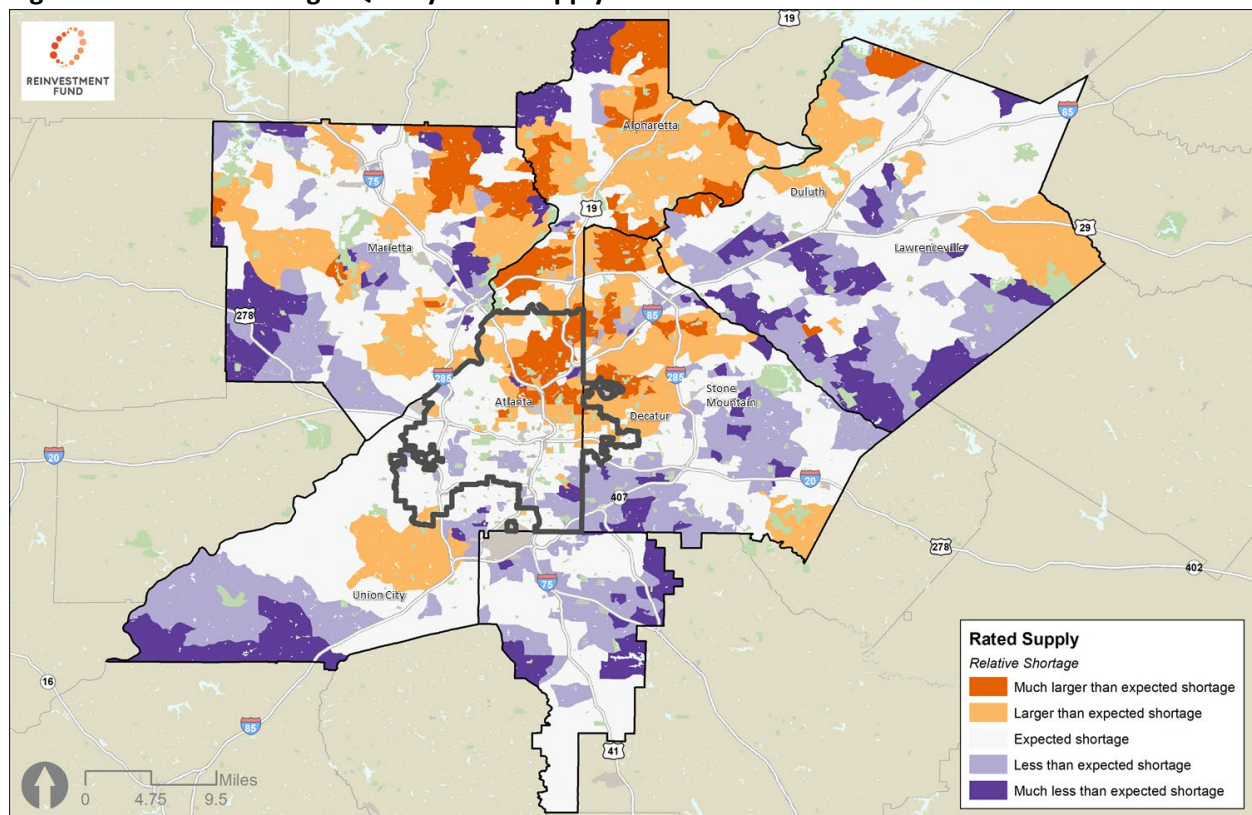
The maps below illustrate the relative shortage of total supply and Quality Rated supply. Areas shaded in orange had the largest relative shortages, while purple areas had the smallest relative shortages of child care. The largest gaps in total supply existed throughout the region, but were concentrated in Atlanta, East Cobb, Stone Mountain, and along the I-85 corridor in Dekalb County.

**Figure 5: Relative Shortage: Total Supply**



The largest relative gaps in Quality Rated supply were more concentrated in the north central part of the five-county region. Many of the areas identified as having high shortages of Quality Rated supply were also higher-income areas. The concentration of Quality Rated shortages in higher-income areas may reflect state policies that now require providers that accept child care subsidies to be Quality Rated. Providers that do not generally serve families using child care subsidies may have less incentive to participate in Quality Rated. The following section explores the relation between shortage and family income in more detail.

**Figure 6: Relative Shortage: Quality Rated Supply**



The table below shows the population of children under five living in areas with different levels of shortage across each of the five counties. DeKalb and Gwinnett Counties had the highest proportion of children living in block groups with the largest shortages.

**Table 5: Population of Children by Total Relative Shortage**

|                            | Much Less<br>Than Expected<br>Shortage | Less Than<br>Expected<br>Shortage | Expected<br>Shortage   | Larger Than<br>Expected<br>Shortage | Much Larger<br>Than Expected<br>Shortage | Total                   |
|----------------------------|--|-----------------------------------|------------------------|-------------------------------------|--|-------------------------|
| <b>Clayton<br/>County</b>  | 529<br>2%                              | 3,136<br>14%                      | 11,376<br>52%          | 5,483<br>25%                        | 1,320<br>6%                              | <b>21,844<br/>100%</b>  |
| <b>Cobb<br/>County</b>     | 545<br>1%                              | 8,204<br>18%                      | 22,989<br>50%          | 10,130<br>22%                       | 4,240<br>9%                              | <b>46,108<br/>100%</b>  |
| <b>DeKalb<br/>County</b>   | 4,673<br>9%                            | 10,974<br>21%                     | 17,695<br>34%          | 10,127<br>20%                       | 8,399<br>16%                             | <b>51,868<br/>100%</b>  |
| <b>Fulton<br/>County</b>   | 10,483<br>17%                          | 13,876<br>22%                     | 25,938<br>42%          | 8,104<br>13%                        | 3,522<br>6%                              | <b>61,923<br/>100%</b>  |
| <b>Gwinnett<br/>County</b> | 7,561<br>12%                           | 9,395<br>15%                      | 22,685<br>37%          | 12,575<br>20%                       | 9,469<br>15%                             | <b>61,685<br/>100%</b>  |
| <b>Region-<br/>wide</b>    | <b>23,791<br/>10%</b>                  | <b>45,585<br/>19%</b>             | <b>100,683<br/>41%</b> | <b>46,419<br/>19%</b>               | <b>26,950<br/>11%</b>                    | <b>243,428<br/>100%</b> |



Trends for shortages of Quality Rated supply were different. The table below shows the population of children under five living in areas with different levels of Quality Rated shortage across each of the five counties. The largest number of children living in areas with large shortages were in Fulton County, where nearly 40% of children under five were living in block groups classified as having larger or much larger than expected shortages of Quality Rated supply. Clayton County had no children living in areas with larger than expected shortages.

**Table 6: Population of Children by Quality Rated Relative Shortage**

|                            | Much Less<br>Than Expected<br>Shortage | Less Than<br>Expected<br>Shortage | Expected<br>Shortage   | Larger Than<br>Expected<br>Shortage | Much Larger<br>Than Expected<br>Shortage | Total                   |
|----------------------------|--|-----------------------------------|------------------------|-------------------------------------|--|-------------------------|
| <b>Clayton<br/>County</b>  | 3,571<br>16%                           | 8,658<br>40%                      | 9,615<br>44%           | 0<br>0%                             | 0<br>0%                                  | <b>21,844<br/>100%</b>  |
| <b>Cobb<br/>County</b>     | 4,899<br>11%                           | 10,211<br>22%                     | 17,905<br>39%          | 10,235<br>22%                       | 2,858<br>6%                              | <b>46,108<br/>100%</b>  |
| <b>DeKalb<br/>County</b>   | 2,913<br>6%                            | 14,440<br>28%                     | 17,061<br>33%          | 12,951<br>25%                       | 4,503<br>9%                              | <b>51,868<br/>100%</b>  |
| <b>Fulton<br/>County</b>   | 2,032<br>3%                            | 5,297<br>9%                       | 29,802<br>48%          | 17,276<br>28%                       | 7,516<br>12%                             | <b>61,923<br/>100%</b>  |
| <b>Gwinnett<br/>County</b> | 12,555<br>20%                          | 15,351<br>25%                     | 28,476<br>46%          | 4,613<br>7%                         | 690<br>1%                                | <b>61,685<br/>100%</b>  |
| <b>Region-<br/>wide</b>    | <b>25,970<br/>11%</b>                  | <b>53,957<br/>22%</b>             | <b>102,859<br/>42%</b> | <b>45,075<br/>19%</b>               | <b>15,567<br/>6%</b>                     | <b>243,428<br/>100%</b> |

## Income and Job Considerations

To help public officials, funders, and advocates focus on the most critical shortage locations, Reinvestment Fund also examined the intersection of child care shortages with other important socio-economic factors, like poverty rates, family income, and race/ethnicity.

### Family Poverty Rates and Race/Ethnicity

The table below shows the proportion of block groups with larger or much larger than expected relative shortages as well as concentrations of traditionally disadvantaged populations. Of the 1,723 block groups in the five-county region, 340 (20% of all block groups) had a high concentration of families in poverty (over 20% of all families living in the area). Approximately two thirds of the block groups in the five-county region (630) were predominantly African American (over 50% of the population) and 14% (246) had high concentrations of Hispanic residents (over 25% of the population).

Areas with high concentrations of Hispanic residents, and high concentrations of families in poverty, were disproportionately classified as having large shortages in child care. Across the five counties, 30% of block groups had larger than expected shortages. Among block groups with high concentrations of Hispanic residents, 48% had larger than expected shortages (117 of 246). Among block groups with high rates of family poverty, 33% had larger than expected shortages (112 of 340).

**Table 7: Share of All Block Groups with High Relative Shortages in Total Child Care Supply**

|  | High Family Poverty<br>(Over 20% in Poverty) | High African American<br>Area (Over 50% of Pop.) | High Hispanic Area<br>(Over 25% of Pop.) | All Block<br>Groups |
|--|--|--|--|---------------------|
| <b>...with Larger Than<br/>Expected Shortages</b>    | 112 (33%)                                    | 158 (25%)  | 117 (48%)                                | <b>517 (30%)</b>    |
| <b>...without Larger than<br/>Expected Shortages</b> | 228 (67%)                                    | 472 (75%)  | 129 (52%)                                | <b>1,206 (70%)</b>  |
| <b>All Block Groups</b>                              | <b>340 (100%)</b>                            | <b>630 (100%)</b>                                | <b>246 (100%)</b>                        | <b>1,723 (100%)</b> |

### Family Income

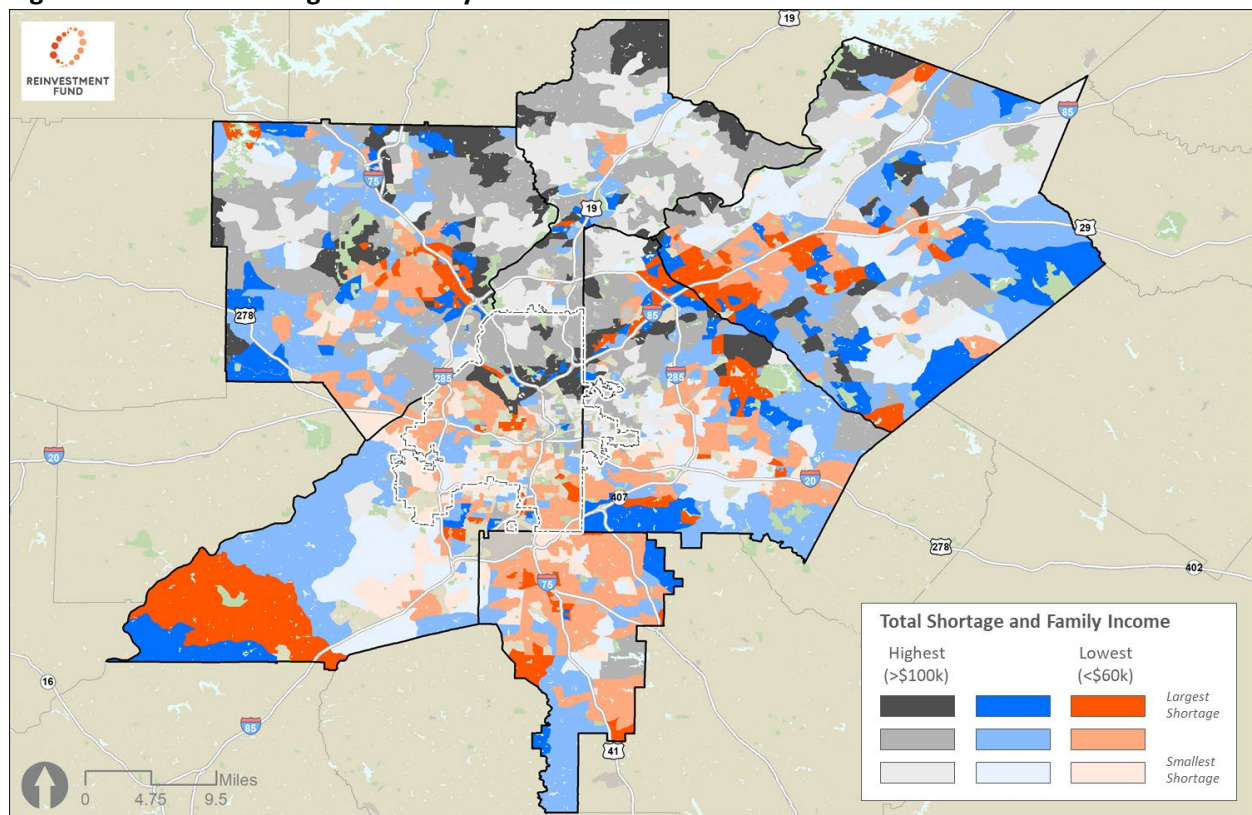
Children living in areas where low-income families predominate (and to a lesser degree, moderate-income families) were more likely to experience high shortages than children residing in high-income areas. The table below describes the number of children living in the five-county region based on the median family income in their block group. While 30% of children in the highest income block groups were in areas with the smallest shortages, only 15% of children in the lowest income block groups lived in areas with the smallest shortages.

**Table 8: Population of Child Care Eligible Children Living in Shortage Areas by Median Family Income**

|                           | Highest Income<br>(Over \$100k) | Moderate Income<br>(\$60 to \$100k) | Lowest Income<br>(Below \$60k) |
|---------------------------|---------------------------------|-------------------------------------|--------------------------------|
| <b>Largest Shortages</b>  | 12,790 (19%)                    | 15,948 (21%)                        | 30,471 (33%)                   |
| <b>Typical Shortage</b>   | 33,785 (51%)                    | 37,793 (51%)                        | 47,745 (52%)                   |
| <b>Smallest Shortages</b> | 20,125 (30%)                    | 21,088 (28%)                        | 13,616 (15%)                   |
| <b>Total Population</b>   | <b>66,700 (100%)</b>            | <b>74,829 (100%)</b>                | <b>91,832 (100%)</b>           |

The map below illustrates the overlap between family income and child care shortages. Areas highlighted in dark red had both low family incomes and high relative shortages. The southern portion of Atlanta, Clayton, and DeKalb counties all had concentrations of block groups with lower median incomes and higher relative care shortages.

**Figure 7: Relative Shortage and Family Income**

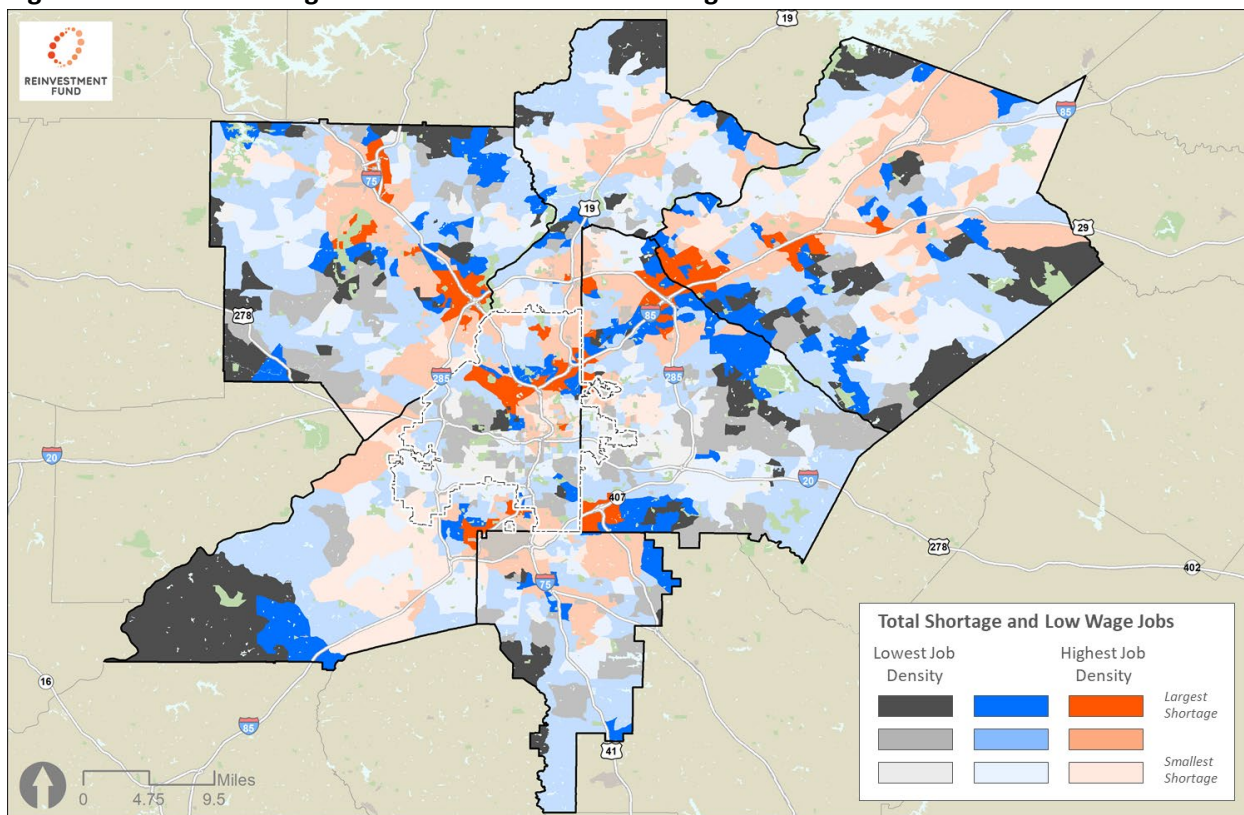


### Low-Wage Jobs

The previous analyses all focused on the characteristics of places where economically and socially disadvantaged families live. However, supply interventions might also be designed to serve these families where they work. Parents employed in careers that require them to work non-traditional hours or on schedules that change with short notice, for example, may prefer or need to seek care near their place of work. The map below shows how shortages in child care correlated with the location of low-wage jobs. Several of the high-shortage areas in Atlanta that are high-income actually have large concentrations of low-wage jobs.

The map below shows the intersection of low wage jobs and child care shortages. Areas highlighted in dark red had both high concentrations of low wage jobs and high child care shortages.

**Figure 8: Relative Shortage and Concentration of Low-Wage Jobs**



## Conclusions

As was the case in 2017 and 2018, our 2022 analysis of child care supply and demand found shortages of child care, particularly Quality Rated care, across the region. But the 2022 analysis also showed notable areas of improvement. As the state's QRIS has continued to mature, the number and proportion of providers in the five-county region participating in DECAL's Quality Rated system has grown. Since the last analysis in 2018, the capacity in programs that have attained Quality Rated status in the region has nearly doubled, and today roughly 56% of the region's capacity is in Quality Rated programs. The growth in QRIS participation offers local stakeholders an opportunity to sharpen their focus on disparities in access and begin to explore how the capacity at different levels of Quality Rating vary across the region. Future analyses could focus on not only where programs are Quality Rated, but what ratings they have achieved, and what investments may be required to improve their ratings further.

Despite the expansion of Quality Rated participation, overall shortages in care remain and continue to disproportionately impact lower-income families and people of color. As in 2018, our analysis revealed that residents of areas with high concentrations of families in poverty, lower-income areas, and areas with higher concentrations of Hispanic households are disproportionately impacted by child care shortages.



## Appendix A: Supply and Shortage in Atlanta

Across the city of Atlanta we estimate there was a citywide child care capacity of just over 26,600. In 2022, we estimate there were approximately 26,600 child care aged children in the city, however, because Atlanta is regional job hub, the maximum potential demand for childcare is just over 37,800. Meaning the city has enough capacity to meet approximately 70% of the demand for child care.

This section describes supply and shortages in the City of Atlanta and within each of the nine high school clusters in the city.

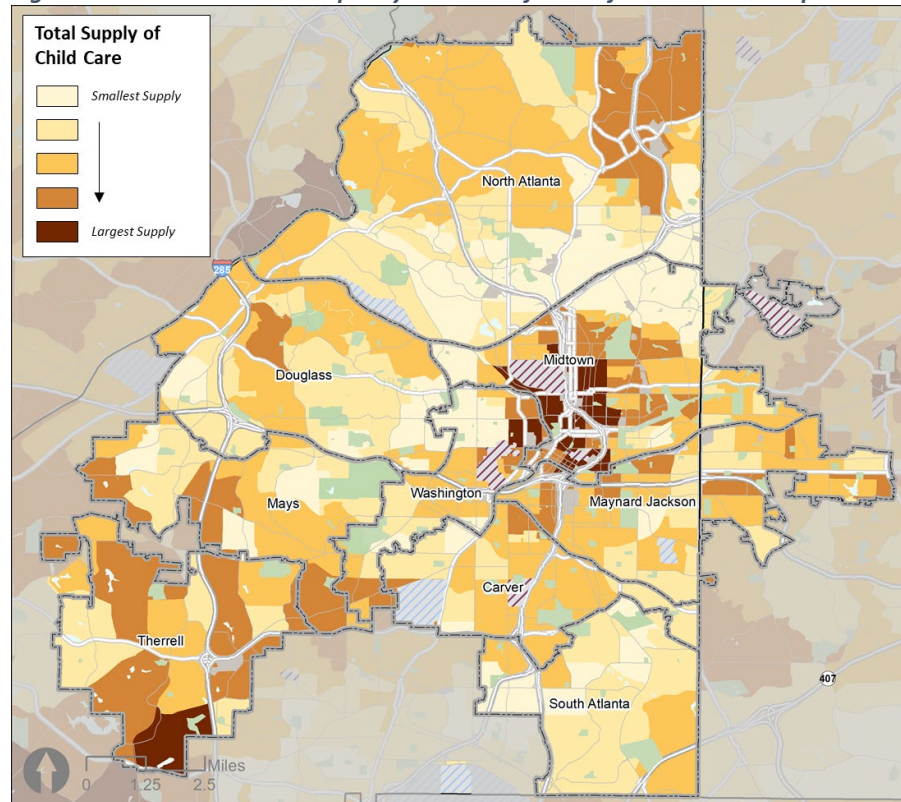
### Child Care Supply in Atlanta

Across the city, we estimated that in 2022, there was a total child care capacity of 26,600. Among the total child care capacity in Atlanta, most (93%) was located in regulated providers (state-licensed providers and providers that are specifically exempt from state licensing requirements). A smaller share, roughly half, was in Quality Rated providers.

*Table A1*

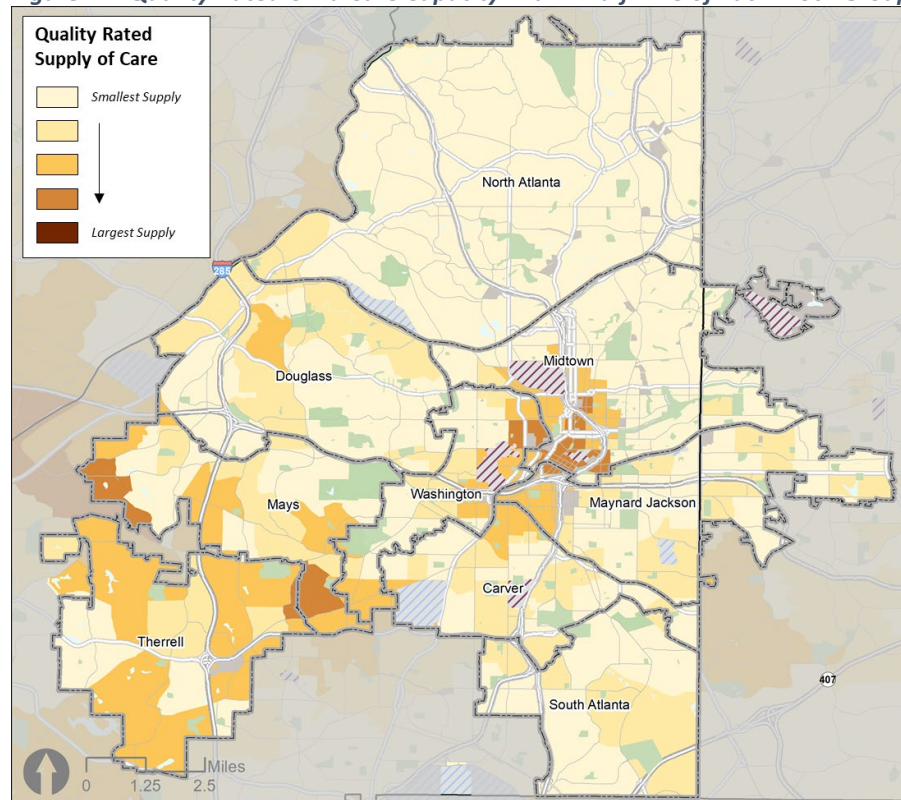
|                        | Total Child Care Capacity | Regulated Capacity | Quality Rated Capacity |
|------------------------|---------------------------|--------------------|------------------------|
| <b>Carver</b>          | 1,717                     | 1,559              | 1,065                  |
| <b>Douglass</b>        | 2,311                     | 2,229              | 1,416                  |
| <b>Midtown</b>         | 7,007                     | 6,539              | 2,184                  |
| <b>Maynard Jackson</b> | 4,162                     | 3,859              | 2,369                  |
| <b>Mays</b>            | 1,661                     | 1,621              | 1,357                  |
| <b>North Atlanta</b>   | 4,843                     | 4,482              | 1,197                  |
| <b>South Atlanta</b>   | 1,193                     | 1,067              | 900                    |
| <b>Therrell</b>        | 1,643                     | 1,444              | 1,027                  |
| <b>Washington</b>      | 2,067                     | 1,931              | 1,478                  |
| <b>Atlanta Total</b>   | <b>26,604</b>             | <b>24,731</b>      | <b>12,993</b>          |

**Figure A1: Total Child Care Capacity within Half Mile of Each Block Group**



The highest capacity was concentrated in downtown Atlanta in the Midtown and Washington High School cluster, and in the city's southwest in the Therrell cluster.

**Figure A2: Quality Rated Child Care Capacity within Half Mile of Each Block Group**



Quality Rated supply in Atlanta represents 49% of the city's total capacity. The highest concentrations of Quality Rated supply are found near downtown in the Midtown and Washington high school clusters.

## Demand and Absolute Shortage in Atlanta

Citywide we estimate that in 2022 there were approximately 26,600 child care aged children in Atlanta. Because the city is a regional job hub that attracts workers from across the five counties and beyond, the actual demand for care in the city is higher. When we factor in the number of families with young children that might choose a program in Atlanta, we estimate that maximum potential demand for child care in Atlanta is just over 37,800. The table below shows the child care population, maximum potential demand, total capacity and shortage in each APS High School cluster.

**Table A2**

|                        | Population Under Five | Maximum Potential Demand | Total Child Care Capacity | Absolute Shortage (Capacity ÷ Demand) |
|------------------------|-----------------------|--------------------------|---------------------------|---------------------------------------|
| <b>Carver</b>          | 2,306                 | 2,176                    | 1,717                     | 79%                                   |
| <b>Douglass</b>        | 3,733                 | 3,552                    | 2,311                     | 65%                                   |
| <b>Midtown</b>         | 3,576                 | 11,901                   | 7,007                     | 59%                                   |
| <b>Maynard Jackson</b> | 3,702                 | 3,544                    | 4,162                     | 117%                                  |
| <b>Mays</b>            | 1,599                 | 1,458                    | 1,661                     | 114%                                  |
| <b>North Atlanta</b>   | 6,180                 | 9,622                    | 4,843                     | 50%                                   |
| <b>South Atlanta</b>   | 1,927                 | 1,846                    | 1,193                     | 65%                                   |
| <b>Therrell</b>        | 2,103                 | 1,979                    | 1,643                     | 83%                                   |
| <b>Washington</b>      | 1,563                 | 1,752                    | 2,067                     | 118%                                  |
| <b>Atlanta Total</b>   | <b>26,687</b>         | <b>37,831</b>            | <b>26,604</b>             | <b>70%</b>                            |

## Relative Child Care Shortages in Atlanta

Across the City of Atlanta there was substantial variation in the level of child care shortages. The table below describes the share of block groups in each APS High School cluster with large relative shortages and the share of the population under five living in large shortage areas. Roughly one third of children under five (34%) live in an areas with large shortages of Quality Rated care.

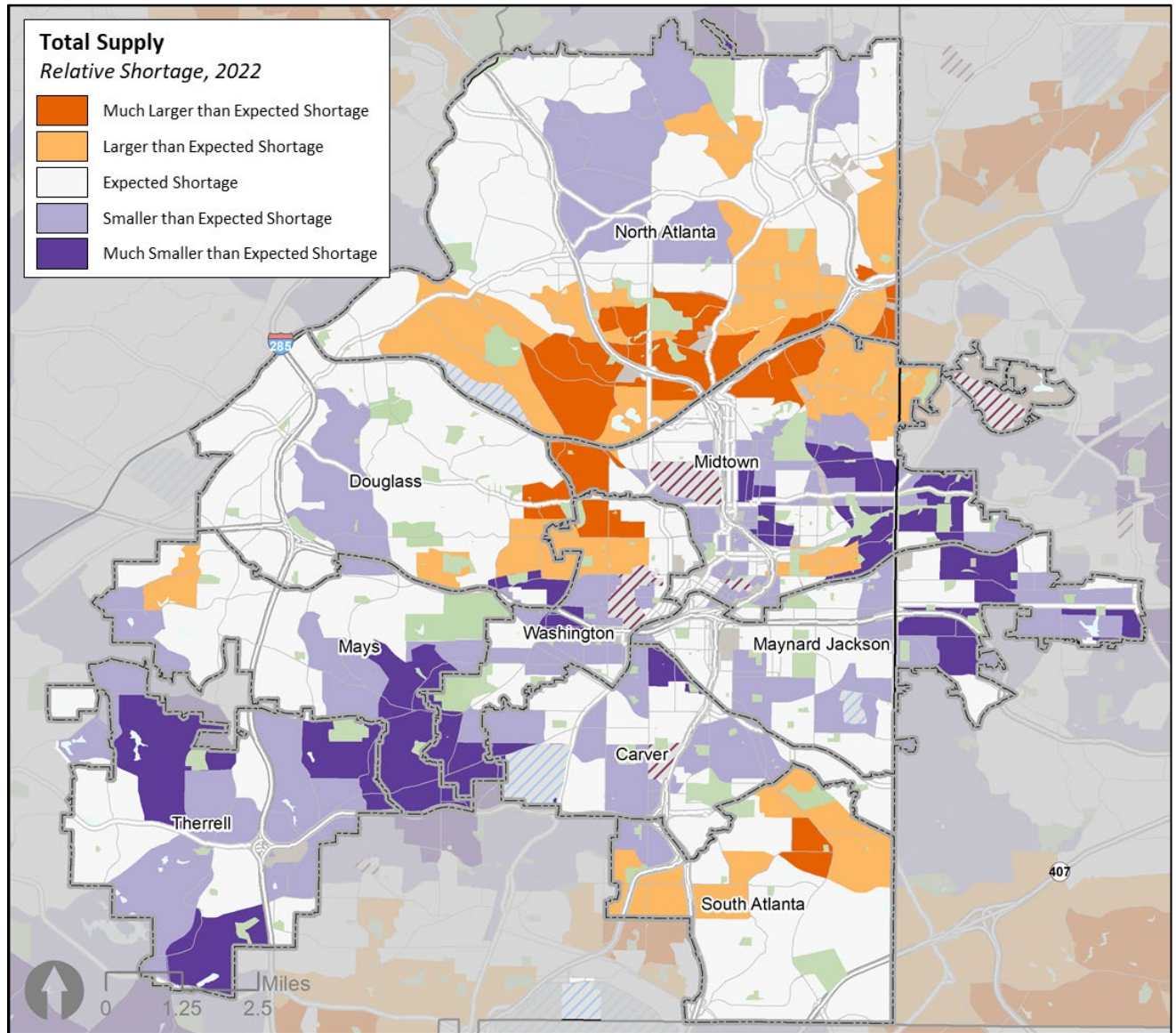
**Table A3**

|                        | All Child Care                             |   | Quality Rated Child Care                   |   |
|------------------------|--|---|--|---|
|                        | Share of Block Groups with Large Shortages | Share of Population Under 5 in Large Shortage Areas | Share of Block Groups with Large Shortages | Share of Population Under 5 in Large Shortage Areas |
| <b>Carver</b>          | 0%   | 0%  | 0%   | 0%  |
| <b>Douglass</b>        | 17%  | 10%   | 17%  | 9%  |
| <b>Midtown</b>         | 21%  | 27%   | 79%  | 81%   |
| <b>Maynard Jackson</b> | 0%   | 0%  | 26%  | 21%   |
| <b>Mays</b>            | 5%   | 4%  | 0%   | 0%  |
| <b>North Atlanta</b>   | 53%  | 51%   | 75%  | 64%   |
| <b>South Atlanta</b>   | 53%  | 38%   | 5%   | 3%  |
| <b>Therrell</b>        | 0%   | 0%  | 6%   | 12%   |
| <b>Washington</b>      | 19%  | 18%   | 9%   | 11%   |
| <b>Atlanta Total</b>   | <b>23%</b>                                 | <b>22%</b>  | <b>41%</b>                                 | <b>34%</b>  |



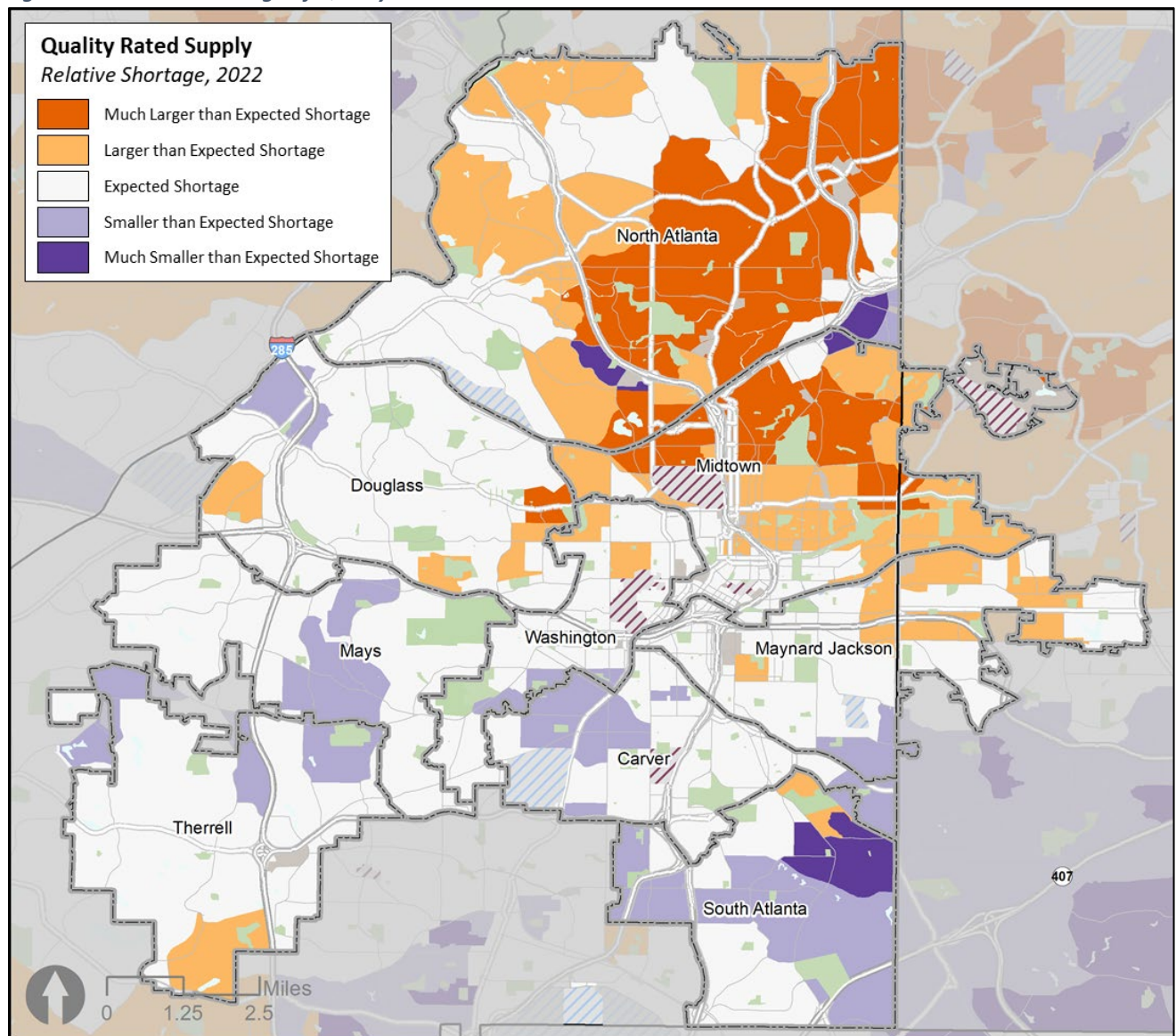
The maps below show the relative shortage of all child care and the relative shortage of Quality Rated child care in the city of Atlanta and the nine APS high school clusters in the city.

**Figure A3: Relative Shortage of All Child Care**





**Figure A4: Relative Shortage of Quality Rated Child Care**

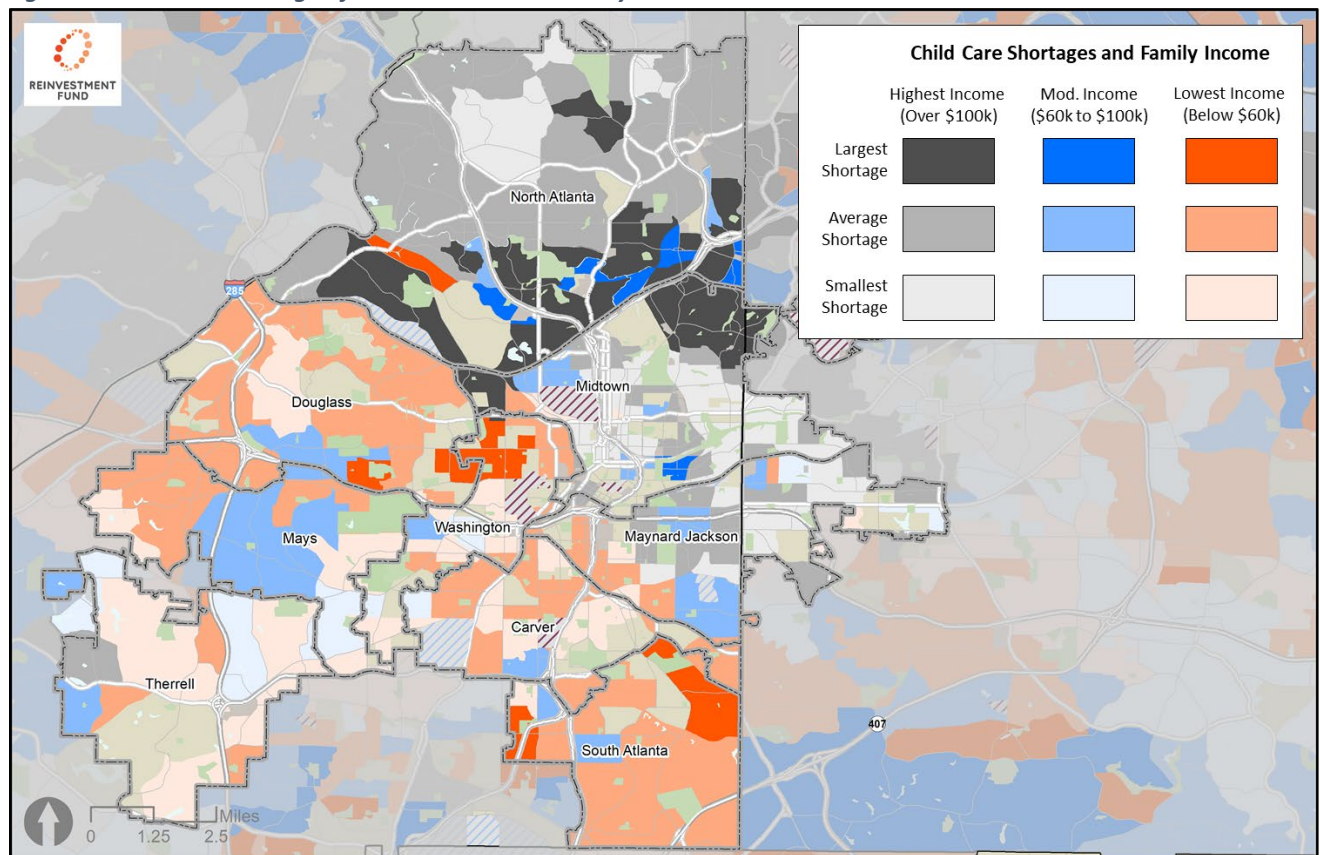


### Relative Shortages and Low-Income Families

When stakeholders think about how and where to prioritize their work to support children and families, the location of high shortage areas provides just one important input. Many stakeholders are particularly interested in understanding where large child care shortages impact low-income families, since these families often have fewer resources and opportunities to access alternative care arrangements.

The map below shows the location of child care shortages, overlaid with family income across the city of Atlanta. As the map shows, many of the largest shortages that impact low-income families are in the Douglass, Washington, and South Atlanta high school clusters.

**Figure A5: Relative Shortage of All Child Care and Family Income**



The table below shows the population of children in areas with average or above average shortages, by their family income in each high school cluster. Douglass, South Atlanta, and Carver each had the highest number of children living in both low-income areas and areas with average or above average shortages. In the Douglass high school cluster, over 2,700 children under five lived in areas with low family incomes and substantial child care shortages.

**Table A4: Children Under Five in Areas with Average and Above Average Shortages by Family Income**

|                        | Lowest Income<br>(Below \$60k) | Moderate Incomes<br>(\$60k to \$100k) | Highest Incomes<br>(Over \$100k) | All<br>Incomes |
|------------------------|--------------------------------|---------------------------------------|----------------------------------|----------------|
| <b>Carver</b>          | 1,027                          | 189                                   | 0                                | <b>1,216</b>   |
| <b>Douglass</b>        | 2,711                          | 132                                   | 78                               | <b>2,921</b>   |
| <b>Midtown</b>         | 211                            | 336                                   | 1,719                            | <b>2,266</b>   |
| <b>Maynard Jackson</b> | 398                            | 231                                   | 655                              | <b>1,284</b>   |
| <b>Mays</b>            | 797                            | 96                                    | 0                                | <b>893</b>     |
| <b>North Atlanta</b>   | 340                            | 595                                   | 4,588                            | <b>5,523</b>   |
| <b>South Atlanta</b>   | 1,683                          | 117                                   | 0                                | <b>1,800</b>   |
| <b>Therrell</b>        | 273                            | 178                                   | 109                              | <b>560</b>     |
| <b>Washington</b>      | 615                            | 100                                   | 18                               | <b>733</b>     |
| <b>Atlanta Total</b>   | <b>8,055</b>                   | <b>1,974</b>                          | <b>7,167</b>                     | <b>17,196</b>  |

## Conclusions

As the largest city in the region, Atlanta is the location of many of the region's child care programs. The city is home to 11% of the region's children under five and contains 15% of the region's child care capacity. Still, many children in Atlanta live in neighborhoods without sufficient child care access. According to our 2022 analysis, roughly 17,200 children under-five lived in areas with average or above average shortages of child care.

Lower income households, without access to alternative child care options may be particularly impacted by child care shortages. The 2022 analysis finds, for example, that nearly 8,000 children under five live in low income areas (where median family incomes are below \$60,000) that also have average or above average shortages. Our analysis helps provide information about where in the city shortages exist and where lower income families may be particularly impacted.

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