CBAER

Center for Business Analytics and Economic Research

GEORGIA SOUTHERN UNIVERSITY

# Childcare Demand Forecast & Market Analysis 2024-2033

**Prepared for**

Regional Industry Support Enterprise (RISE) &
Norfolk Southern Corporate Giving

**Prepared by**

Center for Business Analytics and Economic Research &
EDA University Center Program
Georgia Southern University
October 6, 2025

EDA UNIVERSITY CENTER PROGRAM

NORFOLK SOUTHERN

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The Center for Business Analytics and Economic Research (CBAER) of the Business Innovation Group (BIG) in the Office of Research at Georgia Southern University was engaged to conduct a study by Regional Industry Support Enterprise (RISE) with funding support from Norfolk Southern Corporate Giving

# Executive Summary

This report examines the demand and marketplace for childcare services in the Greater Savannah Georgia Region (GSGR), including Bryan, Bulloch, Chatham, Candler, Effingham, Evans, Liberty, and Screven counties, from 2024-2033. It was developed in partnership with the Regional Industry Support Enterprise (RISE) in Savannah and the Center for Business Analytics and Economic Research (CBAER) at Georgia Southern University. The project was funded by a grant from Norfolk Southern Corporate Giving and Georgia Southern Economic Development Administration (EDA) University Center, which is part of the EDA University Center program funded by the U.S. Economic Development Administration. The analysis confirmed that as new jobs and opportunities emerge for individuals, new demand for childcare services also arises. Childcare services play a crucial role in the economy as quality and affordable childcare allows parents and guardians to participate fully in the workforce.

The Regional population and demand/supply of childcare were forecasted over ten years, from 2024-2033. To prepare this demand forecast, CBAER created a baseline forecast covering 2014-2023, which included the total population in the region, children by age, which included ages of 0-4, 5-9, and 10-14, and the population of children in paid care arrangements. All the historical population data used in the report came from the U.S. Census Bureau and JobsEQ. The historic population growth trends and childcare usage rates set the stage for population forecasts and the general assessment of the demand for childcare in the GSGR.

Next, CBAER incorporated jobs and migration data to forecast population growth, which is the result of newly announced industrial jobs that are joining the GSGR. After these forecasts, CBAER utilizes licensed slots and waitlist data provided by the Child Care Resource & Referral of Southeast Georgia to assess the capacity of GSGR childcare providers to care for the additional children. Next, CBAER conducted interviews with quality-rated childcare providers to gain an understanding of industry challenges and best practices among providers.

Among the Findings of the report are the following:

- The baseline population of the GSGR is expected to grow 13 percent to 701,593 people by 2033. If childcare usage and availability remain the same as they were in 2024, by 2033, 22,041 children aged 0-14 years will be in paid childcare arrangements, which is 781 more than the 21,260 in paid care arrangements in 2024.

- As of 2024, an announced 17,356 new industrial jobs are expected to be added to the GSGR over the next ten years. Of these jobs, 12,287 are in occupations with a limited labor pool in the GSGR. To expand the labor pool to fill these jobs, transfers will become a major factor. Job transfers cover new and existing workers who receive training to take a high-demand job or new workers who relocate into the region.

- Workers who transfer to fill these new industrial jobs may expand their household or create a new household which often includes children. In total, 32,054 people could be added in the GSGR population from 2024-2033. When combined with baseline population growth, the total population of the GSGR is expected to grow to 733,647 people by 2033.

- The extra hiring associated with the announced jobs will result in more parents entering the workforce. After incorporating the new industrial jobs and other jobs in the economy that will be created to support the new industrial workers, an estimated 20,967 total jobs will be added to the region.

- If childcare remains as available as it is in 2025, 26,185 children aged 0-14 will require a paid care arrangement during peak childcare demand in 2028, or 4,925 more children than in 2024. In 2033, this number is expected to be 24,707, or 3,447 more children than in 2024. Additionally, if childcare were to meet national goals for affordability, then regional demand for childcare could increase by over 30 percent.

- The current childcare marketplace is limited and local, meaning childcare is less available in certain areas and for certain children across the GSGR. CBAER has found that two factors that limit available care the most are parents working outside of 8:00 a.m.-5:00 p.m., Monday through Friday work hours, and parents of infants or toddlers.

- To meet peak 2028 childcare demand, the GSGR will need 1,748 more licensed slots than its current 24,437 slots. The average childcare center has 40 slots assigned to it, meaning that the GSGR will need an average of 44 more childcare centers to meet this demand.

- The current price of childcare is above the seven percent level of household income that the United States Department of Health and Human Services (DHHS) defines as affordable. Currently, the average GSGR weekly price of full-time care for a child is $177, which is 13 percent of the GSGR median household income. Average prices are highest for infants at $192 per week, or 14 percent of the GSGR median household income.

- The biggest challenges facing current childcare providers are balancing affordability and quality, financing expansion, and maintaining qualified staff. The low and unstable revenue for childcare providers makes it difficult to raise funds for expansion, and employee compensation is low, leading to high turnover. Childcare rates are already high, and many providers will be unable to operate at capacity if they raise rates any higher to cover these costs.

CBAER conducted a comprehensive literature review and consulted with industry leaders and other stakeholders to provide a list of best practices and actionable items that support the childcare industry. They are as follows:

- First, additional support networks should be created to better connect GSGR providers to technical assistance resources. A GSGR-focused provider network can help connect or offer providers, especially Family Child Care Learning Homes, with technical assistance resources, training, and advocacy efforts.

- CBAER recommends that providers, local officials, provider networks, and technical college representatives develop a strategic plan to promote collaboration and foster relationships among childcare providers, Early Childhood Education (ECE) programs, and local school systems. This will enable providers to have better access to qualified employees.

- Local employers are best positioned to expand childcare availability during non-standard hours by creating or contracting on-site or near-site childcare services. Employers can follow the example of Tyson Foods in Humboldt, Tennessee.

- Under current federal and state tax laws, there are several tax incentives that apply to the development of childcare facilities. Georgia offers the Employer's Credit for Purchasing Child Care Property to help employers create childcare facilities. This credit is equal to 100 percent of the cost of purchasing or constructing the facility. The federal government also offers the Employer-Provided Child Care Tax Credit for 25 percent of the associated costs of running a facility for employers that build and operate an in-house childcare center.

- If an employer chooses to develop childcare, they can either establish a preferred provider relationship with an existing provider or develop a new center that can serve their employees. As part of this relationship, employers should provide a baseline level of support by either using reservation payments or subsidies to the preferred provider, especially if non-standard hours of care are required.

- Zoning laws can be changed to facilitate the creation of new providers. Standardization of zoning laws across the GSGR can allow providers to more easily expand operations. A local example is how the City of Pembroke changed their zoning law to add childcare centers as a conditional use of residential property.

- Finally, local leaders can develop grassroots grant programs to help cover small expenditures and alleviate some of the financial stresses of running a childcare business. This can take the form of small $500 grants or $2,000 microloans to update facilities to best care standards. The administrator of this program needs to specialize in childcare and have trusted relationships with the providers it helps.

This analysis, conducted by CBAER, indicates that the demand for childcare in the GSGR is strong and is expected to remain so from 2024-2033. Natural population growth and new employment opportunities are expected to result in increased demand for paid childcare arrangements from 2024-2033. This demand is expected to reach its peak in 2028 but will remain above current levels in 2033. CBAER also provides evidence that the GSGR will need more licensed childcare slots if childcare is to remain as accessible as it was in 2024, especially for infants and toddlers. Affordability will also remain an important issue for providers looking to fill slots and community members of all income levels who are seeking childcare. As the childcare industry grows, the information presented in this report is intended to aid the development of new providers and local leaders who are interested in aiding the development of childcare. Having more high-quality and affordable childcare will help to increase the labor pool for employers and increase the lifetime earnings of childcare users in the GSGR.

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# Introduction

The Greater Savannah Georgia Region (GSGR) labor market has added just over 8,300 jobs between the third quarter of 2022 and the third quarter of 2024.[1] Industrial employment in this region is expected to grow by an announced 17,356 jobs. These announced jobs began with the 8,500 jobs announced by the Hyundai Motor Group Metaplant America (HGMA) development. This quickly led to announcements from related suppliers. When the impact of adding the original equipment manufacturer (OEM) to the region is combined with spillover growth from these jobs and the growth of existing industries, the GSGR will need to retain, retrain, and expand its workforce.

One part of meeting this challenge is ensuring that each member of the current labor pool can reach their highest potential. This is accomplished through job-related development and the use of resources for personal success outside of work. Personal resources include the safety of neighborhoods, housing costs, and the quality of affordable childcare. Childcare specifically can provide two stabilizing benefits for parents and employers. First, parents gain the ability to focus on their work because they know their children are in a good situation. Second, parents and guardians benefit from affordable childcare because they can earn a higher income due to a better connection to the labor force. Although staying in the labor market may not be the right choice for everyone, it is essential to have services available for those who may choose to or need to work.

Additionally, people who transfer to the region to fill remaining jobs will bring family members with them, including young children. These individuals may also rely on childcare to maintain their employment status and provide their children with a developmentally appropriate education. This shift will introduce greater demand for childcare in the GSGR. Consequently, this demand for care will impact the childcare industry as it attempts to adapt to changes in population while maintaining quality care.

This analysis focuses on estimating the current and future demand for childcare in the GSGR, which includes the counties Bryan, Bulloch, Chatham, Candler, Evans, Effingham, Liberty, and Screven. The report, conducted by the Center for Business Analytics and Economic Research (CBAER) at Georgia Southern University, focuses on five major objectives. These include a ten-year demand forecast for the population and childcare services, an overview of the childcare marketplace, an examination of the industry development challenges, childcare best practices focusing on both businesses and local leaders, and a set of recommendations for next steps.

[1] JobsEQ by Chmura Economics

# Population History and Forecast

Several factors drive childcare demand in a typical regional economy. Two of the more impactful drivers are population and employment growth. In economies where these changes are happening simultaneously, it is common to see an increasing demand for childcare. Furthermore, when employment and population growth are linked to structural economic changes, it is possible to see demand increase more rapidly than the current trend. In the GSGR, the addition of new businesses in the transportation equipment manufacturing industry (NAICS 336) has increased regional demand for childcare. This growth starts with the development of an OEM and continues with the addition of second and third-tier suppliers. Combined, these new employees will add to the local job market and will increase demand for childcare services.

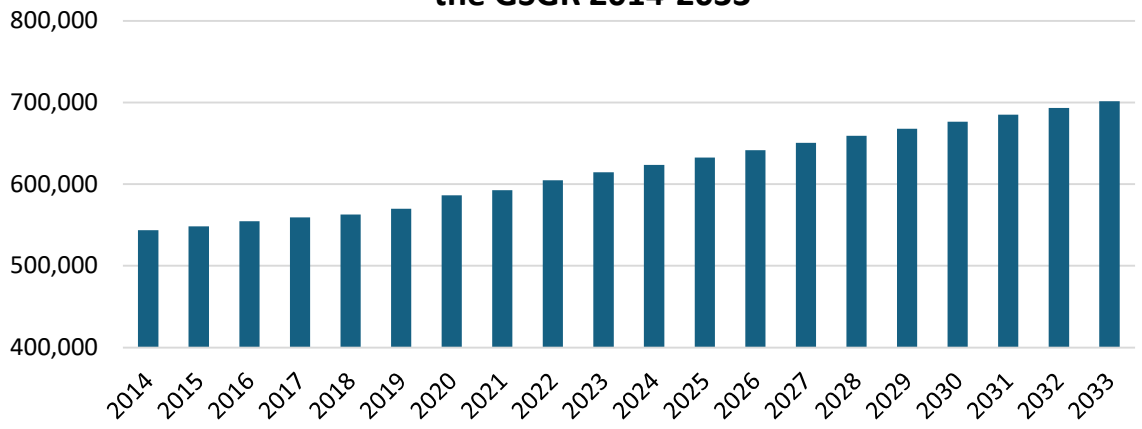
Due to increasing employment and population levels in the GSGR, demand for childcare services is expected to rise over the next decade. The amount and rate of the expansion in childcare services over the ten-year, 2024-2033, time frame is estimated later in this report. To evaluate the future options and challenges facing the childcare industry in the GSGR, CBAER first developed a baseline forecast for childcare demand. The baseline forecast is based on the previous ten years of available population data, which is 2014-2023, and extends to a forecast time frame of 2024-2033. This forecast includes the total population and the 0-14 age group, which will be the primary target users of childcare services. Within the baseline forecast, CBAER also estimated the number of children in paid childcare. The timeframe used is the same 20-year period between 2014-2033. This provides the client with the number of children in paid childcare, excluding the introduction of new employers, such as Hyundai and its tier one suppliers to the region.

Next, CBAER also generated a second forecast following the same 2014-2033 timeframe. In this population forecast, CBAER uses the number of announced new industrial jobs and associated spillover effects as the starting point. The estimate includes the baseline population and the population increase linked to transfers into the area. Those who do transfer to accept a job are likely to bring family members with them, such as a partner and children. Therefore, CBAER assumed that a new household would be introduced to the region for each transfer. Following national trends discussed later in the analysis, some of these children will need childcare.

## Baseline - Population Forecast

CBAER used U.S. Census Annual Population Estimates from 2014-2023 to estimate the total population. Next, the team used data from JobsEQ to project future growth from 2024-2033. The growth rate in the forecast is based on historical age and gender population data from the decennial census, as well as county-level growth rates derived from historical trends.[2] This means that only the historical trend, or baseline trend, is driving this section of the forecast. Any future changes to the GSGR economy are not part of this forecast. Figure 1 presents the total population estimates for the GSGR from 2014-2033. For county-level estimates, see Tables 1 and 2 in Appendix A.

**Figure 1: Total Baseline Population for the GSGR 2014-2033**




Source: PEP U.S. Census, JobsEQ,CBAER Analysis

The total baseline GSGR population increases by 13 percent from 2024 to 2033, reaching 701,593 residents in 2033. Two factors driving this change are natural growth and net migration. Natural growth is the difference between births and deaths, while net migration is the difference between immigration (people moving into an area) and emigration (people moving out of an area). Between 2014 and 2023, natural growth and net migration contributed to population increases in the region at nearly equal rates. Natural growth accounts for 49 percent of total population growth, while net migration accounts for 51 percent.[3]

Across the GSGR, the differences between natural population growth and net migration vary from county to county. In Effingham County, net migration from 2014-2023 totaled 13,861 people, and natural growth reached 2,711 people, which indicates that net migration accounts for 84 percent of the population change.[4] Other counties with large percentages of population

[2] Chmura Economics & Analytics. (2025). *JobsEQ methodology*. Retrieved March 19, 2025, from https://www.chmura.com/blog/2017/june/12/regional-occupation-employment
[3] JobsEQ by Chmura
[4] Ibid.

growth from net migration included Bryan County at 81 percent and Bulloch County at 78 percent, while the net migration rate in Chatham County accounted for 48 percent of the total population change.[5]

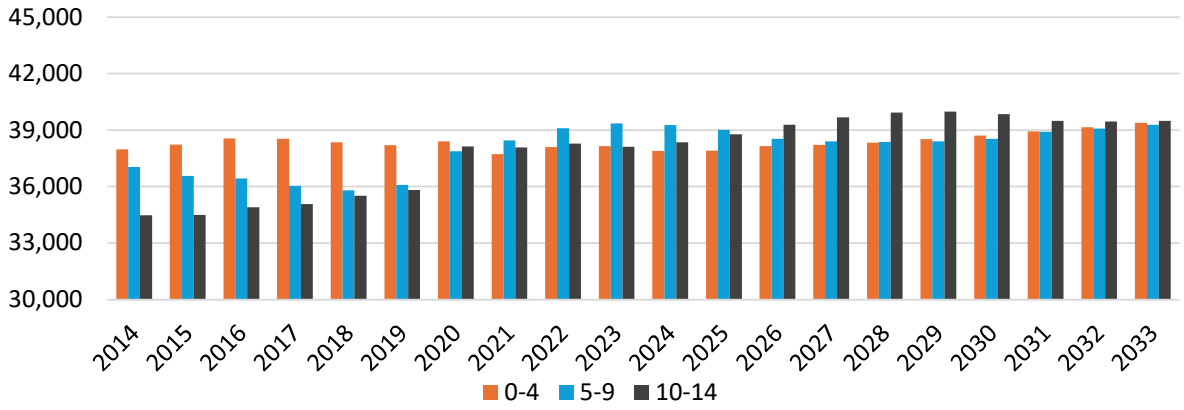
In contrast, two counties, Liberty and Evans, experienced negative net migration from 2014-2023. Liberty County, due to a large transient population associated with Fort Stewart, experienced a net negative migration of -5,953 people from 2014-2023.[6] However, the natural growth of Liberty County in that period was a positive 8,911 people. In this case, the increase in total population is due solely to natural growth. Evans County experienced a net loss of -230 people due to net negative migration and a net gain of 72 people through natural growth between 2024-2023. Combined the total population of Evans County declined by 159 people.

Two counties, Candler and Screven, experienced positive net migration and negative natural growth from 2014-2023. Candler County has a positive net migration of 160 people, a natural growth of -242 people, resulting in a net decrease in total population of -82 people.[7] Screven County experienced a positive net migration of 84 people, offset by negative natural growth of -157 people, resulting in a net decrease of -73 people in the total population. Birth and death rates in Candler and Screven Counties indicate an aging population. For both Candler and Screven Counties, negative natural growth was large enough to outweigh positive net migration and drive the total population down.

Next, CBAER examines the population that typically uses childcare services. CBAER breaks down the population forecasts by age group. For this analysis, CBAER uses the U.S. Census population groups of 0-4, 5-9, and 10-14. These age categories are commonly used to define the potential expectation for childcare demand and the age groups most likely to be placed in childcare.[8] Figure 2 presents the GSGR population estimates for children aged 0-4, 5-9, and 10-14 from 2014 to 2033. For county-level estimates, see Tables 3 and 4 in Appendix A.

[5] Ibid.
[6] Ibid.
[7] Ibid.
[8] Community for Economic Development. (2022). *The Economic Role of Paid Child Care in the U.S. A Report Series — Part 1:The Economic Role of Paid Childcare Part 1*. Community for Economic Development. https://www.ced.org/pdf/220601_CCSE_RptPt4_6.23-final.pdf

**Figure 2: Baseline Children Aged 0-14 in the GSGR 2014-2033**




Source: : PEP U.S. Census, JobsEQ, CBAER Analysis

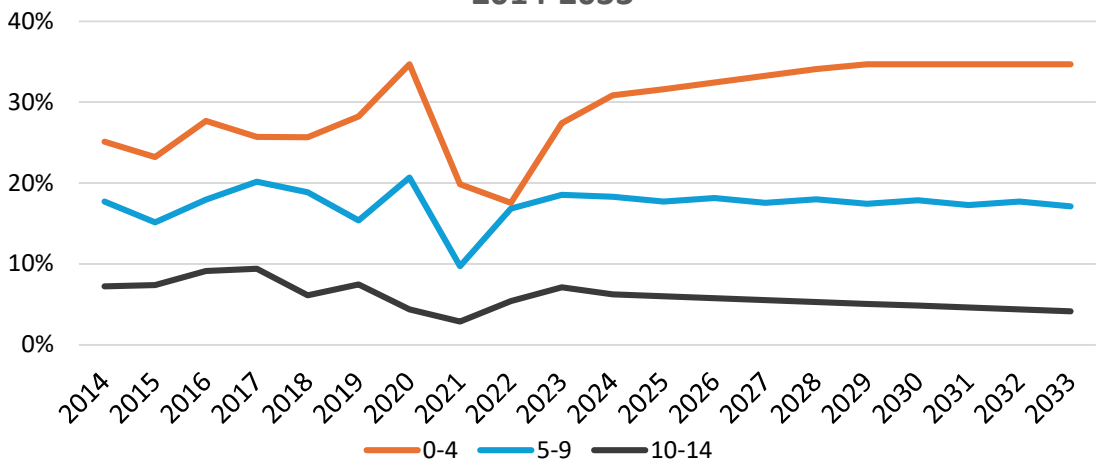
Within the GSGR, the population aged 0-14 is expected to grow by eight percent, reaching 118,160 people by 2033. Overall, the eight percent growth rate for the 0-14 age group is below the rate found for the total population. Within the listed subgroups, between 2014 and 2033, the 0-4 age group is expected to increase by four percent, the 5-9 age group by six percent, and the 10-14 age group by 15 percent. Given that the baseline population is expected to grow, demand for paid childcare is also expected to increase.

Next, CBAER examined the current population and the use of childcare programs. This subsection focuses on the amount of the population currently using paid childcare. The forecast covers any child enrolled in paid childcare, which includes childcare centers, home-based childcare programs, and care provided by friends, family, or neighbors where money was exchanged for the service. These figures do not distinguish between those in full-time or part-time care and do not include childcare provided free of charge by friends or family. The baseline analysis covers the 2014-2033 period.

Not every parent puts their children into a paid childcare facility. Nationwide and statewide, fewer than 20 percent of all children aged 0-14 are enrolled in paid childcare.[9] CBAER calculated the historical rates and forecasted the future rates of children ages 0-4, 5-9, and 10-14 in Georgia. Historical data is gathered from the U.S. Census Integrated Public Use Microdata Series (IPUMS). This historical data is then used to forecast the expected rates of paid childcare use by age groups. For more information on the collection of historical data and forecasting methods, see Appendix B. Figure 3 presents the calculated and forecasted rates of paid childcare use from 2014-2033, broken down by age group in Georgia.

[9] Community for Economic Development. (2022). *The Economic Role of Paid Child Care in the U.S. A Report Series — Part 1:The Economic Role of Paid Childcare Part 1*. Community for Economic Development. https://www.ced.org/pdf/220601_CCSE_RptPt4_6.23-final.pdf

**Figure 3: Georgia Rates of Paid Childcare Usage 2014-2033**




Source: PEP U.S. Census, CBAER Analysis

In the state of Georgia, the children most likely to be placed in a paid childcare arrangement are those between the ages of 0-4, followed by those aged 5-9, and then those aged 10-14. Among these groups, only the group of children aged 0-4 exhibited an upward trend in the rate of use for paid childcare from 2014-2023. Between 2014 and 2020, the percentage of children aged 0-4 in paid childcare increased from 25 percent to 35 percent. In contrast, rates of childcare usage among those aged 5-9 varied from 2014-2023. The highest rate of 0-14 childcare usage was in 2020, at 21 percent, and the lowest rate was in 2014, at 15 percent, exhibiting a slight overall downward trend. Within the 10-14 age group, from 2014-2023, the highest rate was nine percent in 2017, and the rate steadily declined thereafter, particularly after the pandemic.

One factor driving childcare usage in Georgia and the GSGR is the annual cost of childcare. The state ranks as the tenth most expensive in terms of childcare expenses, based on the average weekly family income spent on childcare, which is 20 percent of the total household income.[10] On a percentage basis, this ties Georgia with Washington, putting both states just ahead of Wisconsin and New Jersey. Families using childcare, on average, spend $315 a week on childcare. When compared to neighboring states, Georgia ranks higher as a percentage of household income. The states in the region with the second and third highest average spending as a percentage of household income, North Carolina and Tennessee, spend 18 percent and 17 percent of household income respectively.[11] These costs could account for some of the declines in childcare usage as children age and parents or guardians seek ways to reduce this expense.[12] If the current costs of childcare to families were to dramatically lower to more affordable levels, the rate of children 0-14 in paid care can be expected to rise. CBAER estimates based on

[10] Davis, M. (2024). *Families Who Pay for Child Care Spend Nearly a Fifth of Their Income on It.* Lending Tree. https://www.lendingtree.com/debt-consolidation/child-care-income-study/
[11] Ibid.
[12] Ibid.

childcare affordability research in other cities suggest that if the cost to parents lower to a more affordable seven percent of household income instead of 20 percent, then the amount of children 0-14 needing a paid care arrangement could rise by over 30 percent.[13]

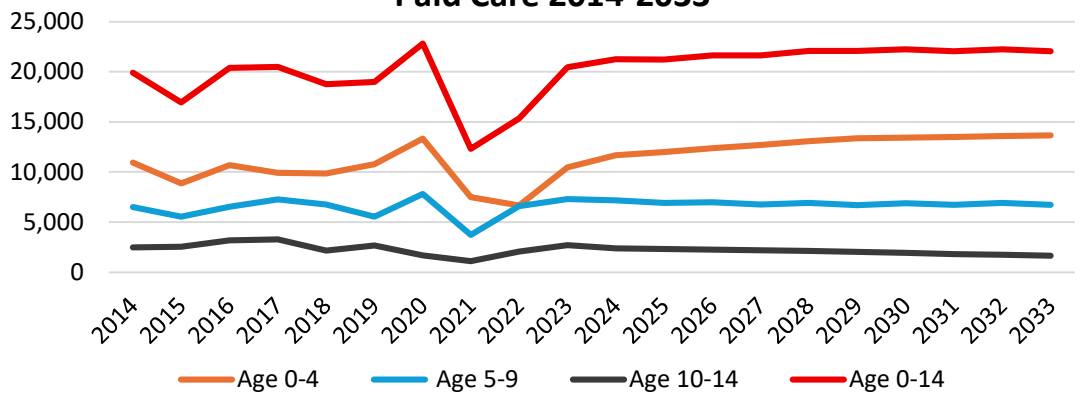
Another factor driving childcare usage is the labor force participation rate of mothers.[14] Labor force participation rates among mothers have increased over the past 20 years, particularly among those with children aged 0-4. The labor force participation rate of mothers with children aged 0-4 is more strongly linked to the use of paid childcare.[15]

Providers have multiple incentives to provide for these younger children over others. First, parents and guardians are more likely to need full-time care because these children are not in school. Second, typical prices charged by providers for children aged 0-4 are higher than those for children aged 5-14.[16] Infant and toddler care have higher operating expenses than care for school-aged children, but for children aged three to four, these expenses are reduced, especially in terms of staffing.[17] This combination of financial incentives and increased demand could mean that the increasing ratio of children in paid care ages 0-4 reflects a market shift by providers. From 2024-2033, the rate is expected to slowly rise back to and stabilize at its previous high of 35 percent. Paid childcare utilization rates for ages 5-9 and 10-14 are forecasted to decline slightly to seven percent and four percent, respectively.

Next, CBAER combined the baseline population forecasts for GSGR and the rates of paid childcare usage. This results in the expected number of children who will be using paid childcare arrangements. Figure 4 presents the baseline number of children in paid childcare. For county level estimates, see Tables 5 and 6 in Appendix A.

[13] Borowsky, J. et. al. (2022). *An Equilibrium Model of the Impact of Increased Public Investment in Early Childhood Education.* National Bureau of Economic Research Working Paper 30140. https://www.nber.org/papers/w30140
[14] Community for Economic Development. (2022). *The Economic Role of Paid Child Care in the U.S. A Report Series — Part 2: Labor Force Participation*. Community for Economic Development. https://ced-microsite.files.svdcdn.com/production/documents/220401_CCSE_Report_Part_2_Arev.pdf?dm=1678471241
[15] Community for Economic Development. (2022). *The Economic Role of Paid Child Care in the U.S. A Report Series — Part 3: Economic Growth Modeling*. Community for Economic Development. https://ced-microsite.files.svdcdn.com/production/documents/220501_CCSE_Rpt_Pt3.pdf?dm=1678471479
[16] Georgia Department of Early Care and Learning. (2023). *Georgia October 2023 Child Care Market Rate Administrative Data*. Georgia Department of Early Care and Learning
[17] Georgia Department of Early Care and Learning. (2025). *Child Care Learning Centers: Rules & Regulations Indicator Manual*. Bright From the Start

**Figure 4: Total GSGR Baseline Number of Children in Paid Care 2014-2033**




Source: Census Current Population Survey, CBAER Analysis

The baseline number of children in childcare is expected to increase by eight percent, reaching 22,041 children by 2033. This is driven entirely by an increase in the number of children aged 0-4 in paid childcare, with this group expected to increase 31 percent to 15,230 children in 2033. The number of children in paid care aged 5-9 is expected to decline by six percent to 6,727 children in 2033. In children aged 10-14, the number in paid care is expected to decrease by 39 percent to 1,642 children by 2033.

## Potential Growth Forecast - Overview

Building on the baseline forecast, CBAER developed an estimate of the potential population growth that could occur in the GSGR. The population forecast is based on the expanding number of jobs being added to the region by major industrial employers and their first, second, and third-tier suppliers. These new employment opportunities are expected to lead to an increase in the population, as unfilled openings will likely encourage individuals to transfer into these jobs. Transfers cover two different types of workers. The first are new and existing workers who are already part of the GSGR. Examples of these types of workers are recent graduates, discharged military members, workers who are changing jobs in the region, etc. Many of these workers will have taken part in a training program that is provided in the region to develop the workforce for high-demand jobs. The second group are people moving to the region to take a high-demand position and are coming from outside the GSGR.

In total, major industrial employers and their tier one, two, and three suppliers announced 17,356 additional jobs over the next ten years.[18] From these jobs, 12,287 will be in high demand and, therefore, more likely to be filled by transfers in the area. CBAER calculates the new employment in the region by totaling the announced jobs for each 4-digit industry code. Table 1 shows each industry code and the announced jobs for that code.

[18] CBAER Analysis

**Table 1: 2025 Announced Jobs to GSGR by Industry**

| NAICS Code | Industry | Total Jobs |
|---|---|---|
| **3361** | Motor Vehicle Manufacturing | 8,400 |
| **3363** | Motor Vehicle Parts Manufacturing | 5,350 |
| **3364** | Aerospace Product and Parts Manufacturing | 1,600 |
| **3329** | Other Fabricated Metal Product Manufacturing | 600 |
| **3362** | Motor Vehicle Body Manufacturing | 456 |
| **4841** | General Freight Trucking | 395 |
| **3152** | Cut and Sew Apparel Manufacturing | 294 |
| **4232** | Furniture and Home Furnishing Merchant Wholesalers | 80 |
| **3252** | Artificial and Synthetic Fibers and Filaments Manufacturing | 71 |
| **3141** | Textile Furnishings Mills | 70 |
| **6115** | Technical and Trade Schools | 40 |
| **Total** | | **17,356** |

Source: CBAER Analysis

Among these, two categories account for the majority of the announced jobs: NAICS 3361, Motor Vehicle Manufacturing, and NAICS 3363, Motor Vehicle Parts Manufacturing. Combined, they represent 13,750 of the 17,356 jobs, or 79 percent of the announced jobs.

Next, to determine the expected job makeup for the region, the research team utilized JobsEQ by Chmura Economics to identify the likely occupational composition of these jobs. Then, to find the jobs most likely to spur workers to transfer, CBAER found the highest-demand jobs within the announced occupation. CBAER defines high-demand jobs as those with six or fewer candidates per unfilled position. Recent workforce studies estimate that new demand in the industrial sectors will exceed available supply by 2025.[19] CBAER assumed for the analysis that these high-demand positions would be filled through transfers. Table 2 breaks down the characteristics of the high-demand jobs by two-digit Standard Occupational Code (SOC).

[19] Wadley Donovan Gutshaw Consulting. (2024). *Savannah JDA Workforce Study Executive Summary.* WDG Consulting. https://savannahjda.com/wp-content/uploads/2023/11/FINAL_Nov14_WDGC-Savannah-JDA-Executive-Summary-Workforce-Study.pdf

**Table 2: 2025 Announced Jobs in GSGR By 2-Digit SOC Code**

| SOC | Occupations | Jobs | Median Wage | Degree Required | AVG Candidates Per Opening |
|---|---|---|---|---|---|
| 51 | Production | 10,457 | $46,101 | High-School | 1.52 |
| 17 | Architecture and Engineering | 800 | $101,365 | Bachelor's | 2.84 |
| 49 | Installation, Maintenance and Repair | 453 | $62,303 | High-School | 2.69 |
| 11 | Management | 257 | $141,400 | Bachelor's | 1.48 |
| 43 | Office and Administrative Support | 168 | $56,100 | High-School | 5.29 |
| 13 | Business and Financial Operations | 143 | $78,800 | Bachelor's | 5.33 |
| 27 | Arts, Design, Entertainment, Sports and Media | 9 | $77,500 | Bachelor's | 1.31 |
| | **Total** | **12,287** | **$52,830*** | | **2.92** |

Source: JobsEQ, BLS Occupation Outlook Handbook, CBAER Analysis
*Weighted average median salary, CBAER Analysis

Among the 17,356 new jobs announced, a total of 12,287 qualify as high demand. These jobs are spread across seven different SOCs. Most were in production occupations (SOC 51). Of the highest-demand jobs, 10,457 are production occupations, and the second-largest group is architecture and engineering occupations (SOC 17), at 800. The current median wage in the region is $45,400. Even the job category with the lowest median wage (Production) is slightly above this wage at $46,101, or two percent above GSGR median wage.[20] Typically, most of these jobs require a high school degree and/or some additional vocational training to be eligible for the occupation. Due to these requirements, low regional unemployment, and the resulting low candidate pool for each position within the region, currently, individuals who will be transferring into these positions will likely be new entrants into the labor market. In line with other industrial development childcare studies, each transfer is assumed to be the head of a household.[21] These households often include partners and children, so transfers will also involve other individuals. This means that high-demand occupations will increase the population by more than the number of open positions.

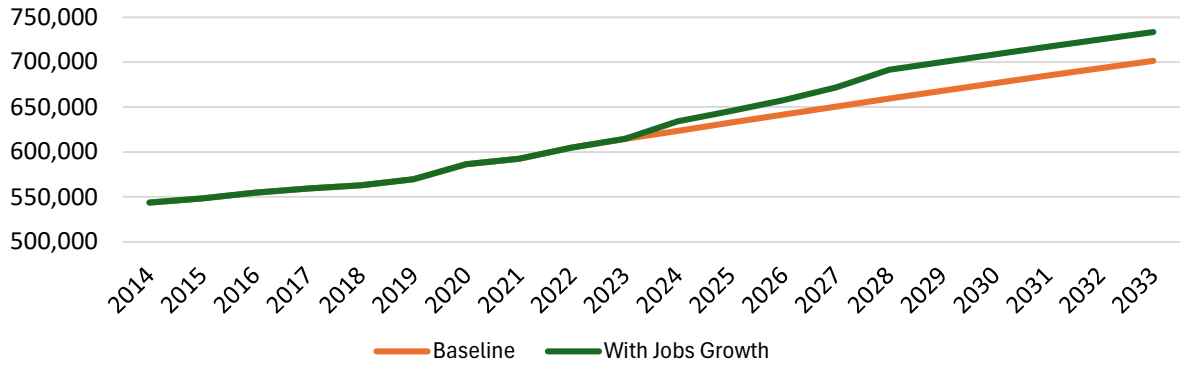
[20] JobsEQ by Chmura
[21] Manship, K., Weinberg, E., Wallace, L., Burroughs, N., Muenchow, S., Laird, K., Stagner, N., Anthony, J., Bishop, A., & Blankenship, C. (2024). *Expanding child care in Arizona: Report to the Arizona Commerce Authority*. American Institutes for Research

Next, CBAER calculates the increase in population resulting from transfers and their families moving to the GSGR by incorporating Georgia's average household size. The average household size in Georgia is 2.6 people.[22] CBAER multiplies the average household size by the 12,287 new transfers coming to the region, and adds the natural growth of this cohort to this population, bringing 32,054 new people to the GSGR once hiring is completed.

## Potential Growth Forecast - Population Forecast

The population forecasts in this section cover the period from 2024-2033 with historical data listed in the figures from 2014-2023. They will cover the total population, including 0-14 age groups, as discussed in the baseline forecast area. The figures in this section combine the new net population from the transfers, the natural population growth of the transfer group, and the baseline forecast. Natural population growth begins one year after transferring in this analysis. Figure 5 presents the total population in the GSGR from 2014 to 2033. For county-level estimates, see Tables 7 and 8 in Appendix A.

**Figure 5: Total Population in GSGR with Employment Growth 2014 -2023**



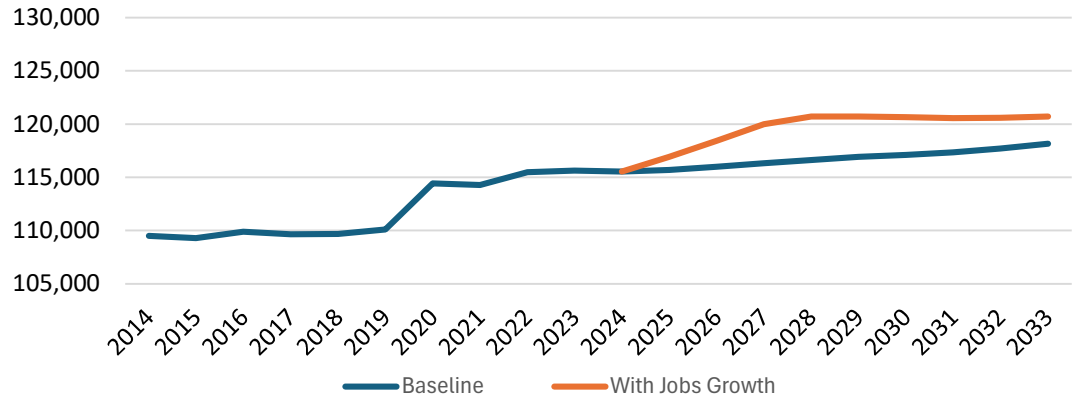

Source:U.S Census PEP, JobsEQ, CBAER Analysis

Transfers who assist in filling these high-demand jobs began contributing to the GSGR total population as early as 2023. After the initial hiring spike, natural growth is expected to resemble the growth of the resident population, resulting in long-term growth rates that are comparable to the baseline forecast. In total, the jobs are expected to result in an additional 32,054 people above baseline forecast by 2033, bringing the region's total population to 733,647, which is a five percent increase over baseline estimates.

[22] U.S. Census Bureau, U.S. Department of Commerce. (2023). Households and Families. *American Community Survey, ACS 1-Year Estimates Subject Tables, Table S1101*. Retrieved March 21, 2025, from https://data.census.gov/table/ACSST1Y2023.S1101?q=average+hosuehold+size&g=040XX00US13

The team next forecasted the population increase from the 0-14 age group linked to the new population. The team used Annual Population and Housing Estimates (PEP) prepared by the U.S. Census Bureau to find how many children will be associated with the extra transfers. Figure 6 contains the forecast of children aged 0-14 in the GSGR for the years 2014-2033. For county-level estimates, see Tables 9 and 10 in Appendix A.

**Figure 6: Total Population Aged 0-14 With Employment Growth in GSGR 2014-2033**




Source: Census PEP, CBAER Analysis

The future population of children aged 0-14 is expected to grow rapidly during the initial hiring period from 2024-2028. The increase in children from 2024-2028 represents a higher-than-typical level of growth in the child population. Once this initial phase is over, the growth rate of the age groups is expected to revert to baseline. During this time, the new child population will begin to age out of the 0-14 age group. Therefore, the difference between the baseline population of children and the new total population will narrow between 2028 and 2033 after transfers for the jobs have slowed or finished.

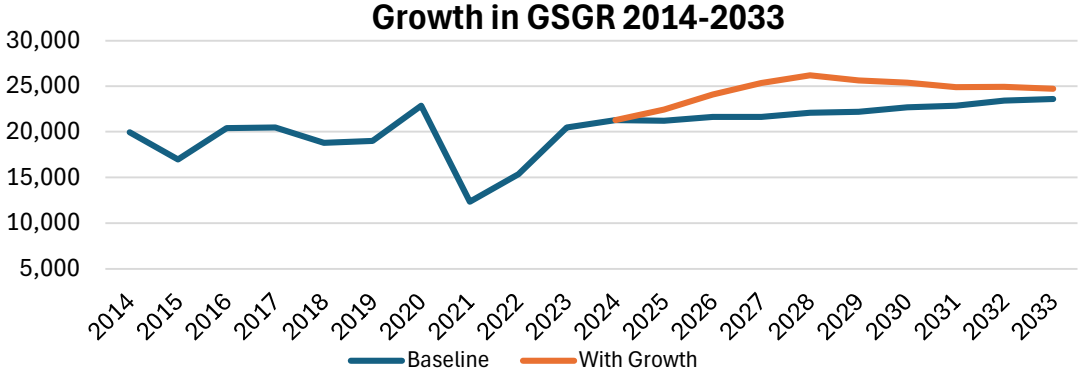
Nevertheless, the number of children is expected to remain above baseline levels in 2033. The population of children age 0-14 is expected to rise more quickly than the baseline and peak in 2028 at 120,736 children, 4,101 above the baseline, before beginning to revert to the baseline. The total population of children 0-14 in 2033 is expected to be 120,705 or 2,545 more children than the baseline estimate.

## Potential Growth: Childcare Population Forecast

To estimate the new demand for childcare resulting from employment expansion, CBAER first calculated the total number of expected jobs that would result from the announced job creation. CBAER utilized data from JobsEQ to identify potential new job creation resulting from the 17,356 announced jobs, which was estimated to be 20,967 after incorporating the additional jobs from increased spending. These high-demand occupations are assumed to be filled through transfers or new entrants into the labor force from within the regional

population. While positions may be filled by other trained individuals already participating in the region's labor force, someone will be needed to replace the worker at the job they left. In either case, the job can result in a new child requiring care.[23] Then, using microdata from the Integrated Public Use Microdata Series prepared by the U.S. Census Bureau, CBAER determined the average number of children a new worker joining the labor force would have and then multiplied this by the number of new jobs. This yields the number for children aged 0-14 with an extra parent in the workforce and, therefore, potentially in need of childcare. Next, to determine the number of paid childcare arrangements, the team multiplied the new number of children with an extra parent in the workforce by the rates of paid care use by age groups used in the baseline estimates. Figure 7 presents these details. For county-level estimates, see Tables 11 and 12 in Appendix A.

**Figure 7: Paid Childcare Total Demand With Employment Growth in GSGR 2014-2033**




Source: Current Population Survey, CBAER Analysis

Between 2024 and 2033, the number of children requiring paid care is expected to increase. The years 2025-2028 are expected to present the largest increase over baseline forecasts, as most hiring for new jobs is anticipated to occur during these years.[24] The hiring results in a spike in parents entering the workforce and, therefore, a rapid increase in the number of children in need of care. For formal paid childcare arrangements, this translates to a spike above the baseline forecast in the number of children in need of care from 2025 to its peak in 2028. At the peak, CBAER forecasts that there will be 26,185 children in paid care arrangements, 4,101 more than the baseline forecasts. After that, the number of children who enter paid care arrangements begins to decrease as they age out of the childcare system. In 2028, the total number of children in paid care settings begins to converge with the baseline, but it will remain elevated. In 2033, the total number of children in paid care is expected to be 24,707, which is 2,666 more than the baseline.

[23] Manship, K., Weinberg, E., Wallace, L., Burroughs, N., Muenchow, S., Laird, K., Stagner, N., Anthony, J., Bishop, A., & Blankenship, C. (2024). *Expanding Child Care in Arizona: Report to the Arizona Commerce Authority*. American Institutes for Research

[24] Wadley Donovan Gutshaw Consulting. (2024). *Savannah JDA Workforce Study Executive Summary.* WDG Consulting.

# Overview of Childcare Marketplace

The first segment of the report demonstrated that demand for childcare is strong in both baseline and potential growth scenarios. This section of the report will focus on how prepared the current GSGR childcare marketplace is for the increased demand. The current supply of childcare does not fully meet the existing market demand. This initial lack of full coverage leads families to seek care from unlicensed providers or have one parent or guardian temporarily leave the labor force until childcare becomes available. Both choices could lead to a parent or guardian having to lose income, making it harder for some households to meet their basic needs or create wealth over the long term.

Two primary factors within this market are influencing the supply of childcare. One is the availability of slots at existing providers. These slots are limited due in part to staffing issues, having appropriate facilities to handle young children, and providers' financial limitations. The other factor is the affordability of childcare for families. Affordability is a major constraint in the childcare marketplace. Many families' childcare expenses exceed seven percent of their weekly income, which the United States Department of Health and Human Services defines as affordable.[25] Over the next ten years, the additional children in need of care could lead to price increases unless new providers are added to the GSGR.

Within the childcare industry, three different commonly recognized types of providers exist. These include Child Care Learning Centers (CCLC), Family Childcare Learning Homes (FCCLH), and Friends, Family, and Neighbor Care (FFN). Child Care Learning Centers are businesses operated by a group of people or organizations to provide care and guidance to seven or more children and are licensed by the state.[26] FCCLHs are private residences operated by a person who receives compensation for supervising three to six children and is licensed by the state.[27] Over the past 20 years, the prevalence of licensed FCCLHs has declined in Georgia.[28] In the state, from 2019-2024, the number of Family Child Care Learning Homes declined by 22 percent.[29]

FFN care is provided by relatives, friends, neighbors, and other unlicensed providers and can be paid or unpaid.[30] These informal options provide a valuable service to the community but are often hidden from view and not included in publicly available datasets. National and Georgia

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[25] Child Care and Development Fund (CCDF) Program, 80 F.R. 80466 (proposed December 24, 2015) (to be codified at 45 C.F.R. Part 98). https://www.govinfo.gov/content/pkg/FR2015-12-24/pdf/2015-31883.

[26] Georgia Department of Early Care and Learning. (2025). *Child Care Learning Centers: Rules & Regulations Indicator Manual*. Bright From the Start

[27] Ibid.

[28] Georgia Department of Early Care and Learning. (2024). *Annual report 2024*. Georgia Department of Early Care and Learning

[29] Ibid.

[30] Urban Institute. (2008) *Child Care Vouchers and Unregulated Family, Friend, and Neighbor Care.* Urban Institute. https://www.urban.org/sites/default/files/publication/71321/411665_child_care_vouchers_1_0.pdf

data indicate that FFN care is the most common type of care, especially for parents with infants and toddlers.[31,32] Parents put their children in FFN care for multiple reasons. This could be due to pre-existing trust in the provider, customized care, flexibility in hours, and competitive pricing.[33] The current prevalence and capacity of FFN care in the GSGR are unknown, but it is likely an important part of this market. In the remainder of this report, CBAER will focus on CCLC and FCCLH care due in part to data availability issues, which means that the report will primarily concentrate on licensed providers.

To measure the current supply of childcare in the GSGR, the team examined the number of licensed childcare slots available in 2025 across all eight counties. CBAER initiated this part of the analysis using county-level data and then aggregated it to create a regional estimate. In this case, the county-level data is more important because the childcare market is very localized. This often means that adding slots in a larger market only benefits the people closest to the provider.

In the report, slots are used to estimate the total capacity for available care in the GSGR. Childcare slots refer to the maximum number of children a provider can accommodate and serve and are a useful tool for analyzing total capacity.[34,35] Slots likely overestimate available supply because Georgia regulations allocate licensed total capacity simply by the area of the building where care is taking place.[36] Licensed slots do not consider any other restrictions to capacity that providers may face, such as staffing and equipment limitations.[37] Based on reports prepared before 2020, data indicate that childcare slots overestimate available supply by four to 38 percent. A 2024 study by the Georgia Department of Early Care and Learning reported that the average space used for a child was 44 square feet. This is 25 percent higher than the

[31] National Center for Children in Poverty. (2008). *Demographics of Family, Friend and Neighbor Child Care in the United States.* National Center for Children in Poverty. https://www.nccp.org/publication/demographics-of-family-friend-and-neighbor-child-care-in-the-united-states/

[32] Washington State Department of Children, Youth, and Families. (n.d.). *Family, friend, and neighbor providers*. Retrieved April 29, 2025, from https://www.dcyf.wa.gov/services/earlylearning-childcare/ffn

[33] Ibid.

[34] Masur, S., Fretwell, J., & Davidoff, H. (2024). *Georgia's Child Care Landscape: Challenges and Opportunities for building quality spaces for young children*. Low Income Investment Fund.

[35] Manship, K., Weinberg, E., Wallace, L., Burroughs, N., Muenchow, S., Laird, K., Stagner, N., Anthony, J., Bishop, A., & Blankenship, C. (2024). *Expanding Child Care in Arizona: Report to the Arizona Commerce Authority*. American Institutes for Research

[36] Georgia Department of Early Care and Learning. (2025). *Child Care Learning Centers: Rules & Regulations Indicator Manual*. Bright From the Start

[37] Wong, W., & Datta, A. R. (2023). *Measuring supply capacity at center-based CCEE programs* (OPRE Report #2023-255). Office of Planning, Research, and Evaluation, Administration for Children and Families, U.S. Department of Health and Human Services. Retrieved from https://www.acf.hhs.gov/opre/project/national-survey-early-care-and-education-2019-2017-2022.

minimum.[38,39] Despite these limitations, licensed slots are the best available way to estimate the number of children providers could serve in the GSGR.[40]

Additionally, the number of available slots depends on the type of students being analyzed, which is defined by age. As noted previously, CBAER is most focused on children aged 0-4 and includes information on children aged 5-14. The state of Georgia has divided this group into four categories: infants, toddlers, preschoolers, and school-age children.[41] Infants are children under one year of age, toddlers are children between 1-3 years old, preschoolers are between 3-5 years old, and school-aged children are five years old or older.[42] Regulatory demands are more stringent for younger children than they are for older children. For example, fewer infants can be cared for by a single teacher than toddlers or school aged children.[43]

Within each category, the number of available slots that CCLCs and FCCLH use for each group depends on the provider. State rules do not require a provider to offer care for all four categories to receive a quality rating or licensure. Certain incentives, such as previously mentioned regulatory demands, encourage providers to prioritize only caring for children between the ages of 3-4, which can negatively impact the quantity of childcare options for infants and toddlers. This lack of care for infants and toddlers can mean that more parents will have to take time off to care for their children. This break-in connection with the labor force can result in lost wages, delayed promotions, and reduced retirement benefits.[44] From an economic perspective, it is challenging for parents to resume their careers if they take more than a year off to care for their children.[45] The significant economic effects on parents resulting from a gap in infant and toddler care are why our team focuses on these two age groups.

[38] Ibid.
[39] *Georgia Department of Early Care and Learning.* (2024). *Employee Benefits, Facilities, and Child Meal Costs Paid by Child Care Providers.* Georgia Department of Early Care and Learning. https://www.decal.ga.gov/documents/attachments/CostofCareReport5_EmployeeBenefitsFacilitiesandChildMealCosts.pdf
[40] Masur, S., Fretwell, J., & Davidoff, H. (2024). *Georgia's Child Care Landscape: Challenges and Opportunities for building quality spaces for young children*. Low Income Investment Fund.
[29] Georgia Department of Early Care and Learning. (n.d.). Quality Rated program manual. https://qualityrated.decal.ga.gov/Content/Documents/PM_ProgramManual.pdf
[42] Ibid.
[43] Ibid.
[44] Center for American Progress. (2016). Interactive:*The Hidden Cost of a Failing Child Care System.* "Interactives: Child Care Costs." https://interactives.americanprogress.org/childcarecosts/
[45] Ibid.

CBAER utilized data collected by the Child Care Resource and Referral of Southeast Georgia, located at Savannah Technical College, which surveyed providers offering infant and toddler care. This service area included all of the counties in the GSGR. This survey provides information on the providers' county of operation, whether a provider accepts infants or toddlers, whether they have a waitlist for infants or toddlers, and how many children are on the infant or toddler waitlist. CBAER begins by categorizing providers into what services they offer. Table 3 presents data on licensed childcare providers in the GSGR by county and whether they offer services for infants, toddlers, both, or neither.

**Table 3: 2025 GSGR Number of Licensed Care Providers Services to Infants and Toddlers**

| County | Total Providers | Infant Only | Toddler Only | Both Infant & Toddler | Neither Infant nor Toddler |
|---|---|---|---|---|---|
| Bryan | 22 | 0 | 0 | 19 | 3 |
| Bulloch | 37 | 0 | 1 | 32 | 4 |
| Candler | 8 | 0 | 4 | 4 | 0 |
| Chatham | 390 | 5 | 89 | 165 | 131 |
| Effingham | 58 | 0 | 6 | 18 | 34 |
| Evans | 1 | 0 | 0 | 1 | 0 |
| Liberty | 113 | 0 | 37 | 20 | 56 |
| Screven | 6 | 1 | 0 | 5 | 0 |
| **Total** | **635** | **6** | **137** | **264** | **228** |

Source: CCR&R of Southeast Region Survey

In total, there are 635 providers in the GSGR. Of these providers, six offer care to infants but not toddlers, 137 offer care to toddlers but not infants, 264 offer care for both, and 228 offer care to neither. Within the GSGR, infant care is offered by only 43 percent of providers, and toddler care is offered by 63 percent of providers. This means that fewer infants and toddlers can be cared for than available slots would suggest.

The licensed slots in the region represents the total maximum number of children that providers in the region can serve. Table 4 presents the number of available slots by the provider and county, as well as whether they offer services to infants and toddlers.

**Table 4: 2025 Number of Licensed Slots Available for GSGR Counties**

| County | Total Provider Slots | Infant Only | Toddler Only | Both Infant & Toddler | Neither Infant nor Toddler |
|---|---|---|---|---|---|
| Bryan | 1,359 | 0 | 6 | 1,240 | 113 |
| Bulloch | 1,988 | 0 | 30 | 1,903 | 55 |
| Candler | 176 | 0 | 6 | 150 | 20 |
| Chatham | 14,532 | 56 | 973 | 8,986 | 4,517 |
| Effingham | 3,076 | 0 | 37 | 1,314 | 1,725 |
| Evans | 129 | 0 | 0 | 129 | 0 |
| Liberty | 2,740 | 0 | 48 | 1,674 | 1,018 |
| Screven | 437 | 6 | 18 | 316 | 97 |
| **Total** | **24,437** | **62** | **1,118** | **15,712** | **7,545** |

Source: Decal Public Registry of Providers

Of the 24,437 licensed slots in the GSGR, 15,774 slots, or 65 percent, are assigned to providers that offer infant care or infant and toddler care. This means that the providers in the GSGR could, at most, care for 15,774 infants if every licensed provider filled their slots with nothing but infants. These slots overlap with other age groups. Only 62 slots in the GSGR are from providers that will take an infant but not a toddler. This represents less than one percent of all available slots, and these slots are only located in Chatham and Screven Counties. For toddlers, 16,830 slots are assigned to providers that offer toddler care or toddler and infant care. This means that, at most, 16,830 toddlers could be served if every slot was filled with nothing but toddlers. This is slightly more than infants. In terms of these slots competing with infants, 1,118 are assigned to providers that offer toddler care but not infant care. This represents five percent of the total slots in the region, but unlike exclusive infant care, childcare slots exclusive to toddlers are available in every county except Evans County.

The number of slots available is the upper limit of care offered for infants and/or toddlers, but these slots can also be used for pre-k and school-age children instead. To determine if enough slots are available to care for infants and toddlers, CBAER utilizes waitlist data for infants and/or toddlers. Within the region, a large waitlist for infants and toddlers means that the number of slots allocated for either group is insufficient to accommodate every infant or toddler in need of care. Table 5 presents data on whether a provider has a waitlist, segmented by whether they offered services to either group.

**Table 5: 2025 GSGR Counties Licensed Childcare Providers' Toddler and Infant Waitlist Status**

| | *Exclusive* | | *Cares for Both* | | | *Total* |
|---|---|---|---|---|---|---|
| **County** | **Infant Only** | **Toddlers Only** | **Only Infant Waitlist** | **Only Toddler Waitlist** | **Infant & Toddlers Waitlist** | **Total Providers With Waitlist** |
| Bryan | 0 | 0 | 2 | 2 | 15 | 19 |
| Bulloch | 0 | 0 | 6 | 3 | 6 | 15 |
| Candler | 0 | 0 | 0 | 0 | 3 | 3 |
| Chatham | 3 | 23 | 16 | 9 | 43 | 94 |
| Effingham | 0 | 0 | 0 | 1 | 12 | 13 |
| Evans | 0 | 0 | 0 | 0 | 1 | 1 |
| Liberty | 0 | 3 | 2 | 2 | 15 | 22 |
| Screven | 1 | 0 | 1 | 1 | 1 | 4 |
| **Total** | **4** | **26** | **27** | **18** | **96** | **171** |

Source: CCR&R of Southeast Region Survey

In the GSGR, 171 providers of infant and/or toddler care currently have a waitlist. For a parent of infants, 127 infant care providers, or 47 percent of GSGR infant care providers, currently have a waitlist. In the GSGR, if a parent wanted to enroll their infant into childcare without waiting, only 23 percent of all 635 licensed providers (presented in Table 3) in the GSGR are currently willing and able to immediately enroll their child. The story for toddlers is similar. In the GSGR, 140 toddler care providers, or 40 percent of toddler care providers, have a waitlist. If a parent wanted to enroll their toddler without waiting, only 36 percent of all the 635 providers in the GSGR would be willing and able to enroll their child immediately.

The survey also reported data on the specific size of the waitlist for each provider. CBAER has also introduced the total licensed slots from the Georgia Public Registry of providers as a reference point for comparing the size of the waitlist to the maximum number of children the current providers can legally care for. Table 6 presents the total number of licensed providers of infant and toddler care with a waitlist, as well as the licensed slots for each GSGR county in 2025.

**Table 6: GSGR Counties Toddler and Infant Waitlists Sizes and Licensed Slots 2025**

| County | Total Infant Waitlist | Total Toddler Waitlist | Total Infant and Toddler Waitlist | Total Infant and/or Toddler Licensed Slots | Total Licensed Slots |
|---|---|---|---|---|---|
| Bryan | 395 | 548 | 943 | 1,246 | 1,359 |
| Bulloch | 400 | 421 | 821 | 1,933 | 1,988 |
| Candler | 12 | 60 | 72 | 156 | 176 |
| Chatham | 1,377 | 774 | 2,151 | 10,015 | 14,532 |
| Effingham | 514 | 607 | 1,121 | 1,351 | 3,076 |
| Evans | 3 | 17 | 20 | 129 | 129 |
| Liberty | 411 | 480 | 891 | 1,722 | 2,740 |
| Screven | 11 | 5 | 16 | 340 | 437 |
| **Total** | **3,123** | **2,912** | **6,035** | **16,892** | **24,437** |

Source: CCR&R of Southeast Region Survey, DECAL Public Registry of Providers

In the GSGR, the total size of the infant waitlist is 3,123 infants, representing 13 percent of the entire region's licensed slots. The toddler waitlist size is 2,912 toddlers, accounting for 12 percent of the total licensed slots. When combined, they represent 25 percent of the 24,437 licensed slots in the region.

If a parent wants to enroll their infant and/or toddler in a program with a waitlist, there can be a significant wait before they can enroll their child. Many of the waitlists are first come first serve, meaning that multiple children will need to either leave the provider or be moved into higher age group classrooms before a slot is available. To highlight how many children a parent may need to wait for, CBAER calculated the average waitlist size for both the infant and toddler waitlists in the GSGR. The details are presented in Table 7 below.

**Table 7: Average Infant or Toddler Waitlist Size for GSGR Counties 2025**

| County | Infants | Toddlers |
|---|---|---|
| Bryan | 15 | 19 |
| Bulloch | 6 | 15 |
| Candler | 3 | 3 |
| Chatham | 43 | 94 |
| Effingham | 12 | 13 |
| Evans | 3 | 17 |
| Liberty | 15 | 22 |
| Screven | 1 | 4 |
| **GSGR Average** | **21** | **28** |

Source: CCR&R of Southeast Region Survey, CBAER Analysis

The average infant waitlist size in the GSGR is 21 infants. This means that if a parent is willing to be placed on a waitlist, they can expect to wait for 21 infants to leave the provider before securing care at a provider with a waitlist. Parents of toddlers in the region can expect to wait for 28 toddlers to leave the provider before they can secure care at a provider with a waitlist. One way to reduce the size of these wait lists is to add more quality providers to GSGR.

Although FCCLHs need to part of the solution CCLCs are currently providing the majority of slots in the marketplace. Georgia assigns licensed slots to the FCCLHs and CCLCs differently. First, if they are a FFCLH, they are allotted six slots.[46] For CCLCs, they are allotted one slot for every 35 square feet of the building.[47] This means that licensed slots will skew towards CCLCs. Table 8 presents the 2025 licensed slots in the GSGR and GSGR counties by type of licensed provider.

**Table 8: 2025 GSGR Counties Licensed Slots by Provider Type 2025**

| County | Child Care Learning Centers | Family Child Care Learning Home |
|---|---|---|
| Bryan | 1,341 | 18 |
| Bulloch | 1,940 | 48 |
| Candler | 146 | 30 |
| Chatham | 13,932 | 600 |
| Effingham | 3,040 | 36 |
| Evans | 117 | 12 |
| Liberty | 2,584 | 156 |
| Screven | 431 | 6 |
| **Total** | **23,531** | **906** |

Source: DECAL Public Registry of Providers

Within the GSGR, Child Care Learning Centers account for 96 percent of all licensed slots. In some counties, the share of licensed slots shifts, but all counties heavily skew towards CCLCs. This means that parents whose child fits better in a home-care environment have more limited choices than those whose children are better suited to a center-based setting. As the population and the number of children in need of care increase, the chances of securing care for a child in a home-based setting will decrease more rapidly than those for center-based care. This is because the upper limit of FCCLHs is six and cannot be increased without becoming a CCLC. Without more FCCLH openings, home-based care settings will become more exclusive overtime.

The quality of childcare is important to parents and the State of Georgia. To facilitate and improve childcare quality in the state, the Georgia Department of Early Care and Learning (DECAL) has created a voluntary quality rating system for childcare providers. This system

[46] Georgia Department of Early Care and Learning. (2025). *Family Child Care Learning Homes: Rules & Regulations Indicator Manual*. Bright From the Start

[47] Georgia Department of Early Care and Learning. (2025). *Child Care Learning Centers: Rules & Regulations Indicator Manual*. Bright From the Start

provides ratings for providers that exceed the minimum requirements for licensing. These ratings range from one to three stars, with three signifying the highest quality.[48] The public database of providers also contains information on the quality rating status of providers and allows CBAER to determine how many slots are allocated to providers that participate in the quality-rated system. Table 9 presents the number of slots in the GSGR counties by quality rating.

**Table 9: 2025 GSGR Counties Licensed Slots by Quality Rating**

| County | Total Slots | Q Rated | 1 star | 2 star | 3 star |
|---|---|---|---|---|---|
| Bryan | 1,359 | 893 | 0 | 811 | 82 |
| Bulloch | 1,988 | 1,455 | 74 | 567 | 814 |
| Candler | 176 | 12 | 0 | 0 | 12 |
| Chatham | 14,532 | 11,732 | 2,250 | 6,519 | 2,963 |
| Effingham | 3,076 | 2,410 | 175 | 1,188 | 1,047 |
| Evans | 129 | 117 | 117 | 0 | 0 |
| Liberty | 2,740 | 1,885 | 371 | 1,051 | 463 |
| Screven | 437 | 316 | 0 | 74 | 242 |
| **Total** | **24,437** | **18,820** | **2,987** | **10,210** | **5,623** |

Source: DECAL Public Registry of Providers

Participation in the quality rating system is high but not universal. Of the 24,437 total slots assigned to GSGR providers, 18,820, or 77 percent, are quality rated at least one star. Single-star ratings are the least common among the star ratings, with 2,987 allotted slots, or 12 percent of the total allotted slots. The most common quality rating is two stars, with 10,210, or 42 percent of the total allotted slots. The highest rating, three stars, is located near the midpoint between one-star and two-star ratings in terms of frequency, with 5,623 or 23 percent of all allotted slots in the GSGR.

[48] Georgia Department of Early Care and Learning. (n.d.). *Quality Rated Child Care: Compliance FAQ. https://families.decal.ga.gov/provider/ComplianceFAQ.aspx*

## Comparing Slots to Forecast

This section combines the population forecast presented earlier in this report and the information on licensed childcare slots discussed in the previous section. In this section, negative numbers indicate that the available slots are below the forecasted population, meaning that there are not enough licensed childcare facilities in the selected geographic area. The analysis has been broken down into age categories, starting with all children aged 0-14 in paid childcare and then proceeding to infants, toddlers, children aged three to four, and concluding with children aged five to eleven. These different age groups focus on when children are most likely to opt out of attending a childcare program. Finally, as previously discussed, slots refer to the number of licensed childcare places that a provider has available. Table 9 presents the deficits for childcare slots totaled across all age groups, defined as the difference between licensed childcare slots and the forecasted population of children in paid childcare.

**Table 9: GSGR Counties Children aged 0-14**
**Annual Licensed Slots Deficit 2024-2033**

| County | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 |
|---|---|---|---|---|---|---|---|---|---|---|
| Bryan | -370 | -503 | -677 | -823 | -937 | -925 | -940 | -933 | -972 | -985 |
| Bulloch | -934 | -1,101 | -1,331 | -1,507 | -1,629 | -1,554 | -1,524 | -1,462 | -1,471 | -1,444 |
| Candler | -201 | -217 | -241 | -257 | -266 | -252 | -243 | -230 | -226 | -218 |
| Chatham | 3,957 | 3,405 | 2,634 | 2,058 | 1,679 | 2,001 | 2,160 | 2,427 | 2,446 | 2,589 |
| Effingham | 579 | 411 | 187 | 7 | -127 | -86 | -84 | -53 | -84 | -82 |
| Evans | -240 | -256 | -279 | -295 | -304 | -290 | -281 | -268 | -264 | -257 |
| Liberty | 440 | 326 | 166 | 49 | -25 | 51 | 92 | 156 | 166 | 203 |
| Screven | -54 | -75 | -106 | -127 | -139 | -120 | -108 | -92 | -87 | -76 |
| **Total** | **3,177** | **1,990** | **353** | **-895** | **-1,748** | **-1,175** | **-928** | **-455** | **-492** | **-270** |

Source: DECAL Public Register of Providers, CBAER analysis

Following the potential population growth forecast for the GSGR population, the peak year of childcare demand is projected to be 2028, resulting in a deficit of 1,748 childcare slots. In 2033, there will be a smaller deficit of 270 slots. In 2025, if every provider were able to enroll as many children as legally allowed, they would have spare slots for 1,990 more children in the 0-14 age group. However, the demand varies by the age of the children being cared for and the counties being served, as some communities have experienced more shortages than others. In Bryan, Bulloch, Candler, Evans, and Screven Counties, shortages are expected to begin in 2024. Only Chatham County is expected to have a surplus of slots during the forecasted time frame.

An earlier analysis of slots suggests that parents of infants and/or toddlers will face more limited options than parents of preschool-aged children or older children. To further investigate this, CBAER segmented its earlier forecast of children in paid care arrangements by age group: infants (less than one-years-old), toddlers (between 1-3 years old), preschool age (between 3-5 years old), and school age (between 5-11 years old). Table 10 presents the slots deficits in the GSGR for the first of these four groups, infants, from 2024-2033.

**Table 10: GSGR Counties 2024-2033 Licensed Slots Deficits for Infants**

| County | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 |
|---|---|---|---|---|---|---|---|---|---|---|
| Bryan | 18 | -3 | -25 | -49 | -66 | -72 | -75 | -80 | -84 | -91 |
| Bulloch | -106 | -137 | -169 | -203 | -225 | -231 | -229 | -229 | -230 | -235 |
| Candler | -39 | -42 | -46 | -49 | -51 | -50 | -49 | -48 | -47 | -47 |
| Chatham | -311 | -413 | -518 | -629 | -693 | -692 | -672 | -663 | -658 | -664 |
| Effingham | -46 | -74 | -103 | -133 | -153 | -158 | -158 | -161 | -164 | -170 |
| Evans | -29 | -32 | -36 | -39 | -42 | -41 | -41 | -41 | -40 | -40 |
| Liberty | -156 | -179 | -203 | -229 | -243 | -241 | -235 | -232 | -231 | -231 |
| Screven | -15 | -18 | -22 | -26 | -28 | -26 | -25 | -24 | -23 | -22 |
| **Total** | **-684** | **-898** | **-1,122** | **-1,357** | **-1,501** | **-1,511** | **-1,484** | **-1,478** | **-1,477** | **-1,500** |

Source: DECAL Public Register of Providers, CBAER analysis

In the GSGR, the deficit of licensed slots for infants is significantly larger than the overall deficit of slots. In contrast to the overall deficit, which begins in 2028, a shortage of licensed slots starts in 2024. If infants were to require care at historical rates, there would be 918 more infants in the GSGR than the licensed providers can care for. The maximum class size for infants is 12. To address the deficit at its highest level in 2029, the GSGR will require at least 126 additional classrooms for infants. For 2033, the number of extra classrooms needed is 125.

Parents in need of care for their toddler face the second-fewest options among the groups in this analysis, behind parents of infants. Table 11 presents the toddler licensed slots deficits in the GSGR counties from 2024-2033.

**Table 11: GSGR Counties 2024-2033 Licensed Slots Deficits for Toddlers**

| County | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 |
|---|---|---|---|---|---|---|---|---|---|---|
| Bryan | 269 | 232 | 193 | 147 | 115 | 103 | 98 | 89 | 79 | 65 |
| Bulloch | -181 | -215 | -255 | -307 | -340 | -346 | -342 | -345 | -348 | -357 |
| Candler | -38 | -45 | -52 | -59 | -63 | -62 | -60 | -59 | -57 | -56 |
| Chatham | 193 | 12 | -170 | -373 | -482 | -468 | -422 | -398 | -387 | -396 |
| Effingham | 100 | 51 | -1 | -61 | -100 | -111 | -110 | -116 | -122 | -134 |
| Evans | -60 | -66 | -72 | -79 | -82 | -81 | -80 | -79 | -78 | -78 |
| Liberty | -232 | -266 | -302 | -344 | -365 | -360 | -347 | -340 | -335 | -335 |
| Screven | -68 | -74 | -80 | -87 | -90 | -88 | -84 | -82 | -79 | -78 |
| **Total** | **-17** | **-371** | **-739** | **-1,163** | **-1,407** | **-1,413** | **-1,347** | **-1,330** | **-1,327** | **-1,369** |

Source: DECAL Public Register of Providers, CBAER analysis

There is currently a deficit of licensed slots for toddlers, but it is smaller than the deficit for infants. The deficit peaks in 2029 at 1,413 slots before slightly declining to 1,369 slots in 2033. The maximum class size for toddlers is 16. For the GSGR to satisfy the peak 2029 demand, it would need at least an additional 88 classrooms. To accommodate all toddlers seeking care in 2033, the GSGR will need 86 more classrooms for toddlers.

Parents seeking care for their 3-4 year old child face significantly more positive prospects compared to parents of infants and/or toddlers. Table 12 presents the current deficits of the GSGR's counties for children aged 3-4 from 2024-2033.

**Table 12: GSGR Counties 2024-2033 Licensed Slots Deficits for 3-4 Year Old Children**

| County | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 |
|---|---|---|---|---|---|---|---|---|---|---|
| Bryan | -147 | -177 | -218 | -253 | -278 | -280 | -282 | -283 | -292 | -298 |
| Bulloch | -78 | -119 | -177 | -217 | -241 | -220 | -208 | -189 | -189 | -182 |
| Candler | -26 | -30 | -36 | -41 | -43 | -41 | -39 | -37 | -36 | -34 |
| Chatham | 2,383 | 2,373 | 2,254 | 2,221 | 2,163 | 2,332 | 2,362 | 2,484 | 2,476 | 2,573 |
| Effingham | 367 | 350 | 310 | 287 | 263 | 288 | 288 | 306 | 298 | 308 |
| Evans | -36 | -40 | -45 | -50 | -52 | -50 | -47 | -44 | -43 | -42 |
| Liberty | 530 | 521 | 488 | 477 | 462 | 497 | 504 | 531 | 530 | 552 |
| Screven | 44 | 41 | 33 | 30 | 27 | 33 | 36 | 40 | 41 | 45 |
| **Total** | **3,037** | **2,919** | **2,609** | **2,454** | **2,301** | **2,559** | **2,614** | **2,808** | **2,785** | **2,922** |

Source: DECAL Public Register of Providers, CBAER analysis

For half of the GSGR counties, there are more licensed slots available than children aged 3-4 who require a paid care arrangement.

Children aged 5-11 need a paid full-time care arrangement at a much lower rate than the younger age groups. However, the large number of children in this age group can create strains on the system during certain times, such as the summer, when demand increases. Table 13 presents the deficits for children aged 5-11 from 2024-2033.

**Table 13: GSGR Counties 2024-2033 Licensed Slots Deficits for School-aged Children (5-11)**

| County | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 |
|---|---|---|---|---|---|---|---|---|---|---|
| Bryan | -432 | -470 | -533 | -566 | -604 | -576 | -585 | -569 | -588 | -578 |
| Bulloch | -485 | -536 | -624 | -665 | -705 | -650 | -644 | -605 | -613 | -586 |
| Candler | -82 | -83 | -90 | -90 | -92 | -83 | -81 | -75 | -76 | -71 |
| Chatham | 1,440 | 1,220 | 914 | 717 | 593 | 714 | 775 | 875 | 894 | 951 |
| Effingham | 134 | 71 | -16 | -72 | -116 | -89 | -89 | -71 | -83 | -76 |
| Evans | -95 | -97 | -105 | -106 | -108 | -99 | -96 | -89 | -89 | -84 |
| Liberty | 261 | 218 | 161 | 127 | 107 | 136 | 152 | 175 | 181 | 195 |
| Screven | -13 | -20 | -32 | -37 | -42 | -33 | -30 | -24 | -23 | -18 |
| **Total** | **728** | **303** | **-325** | **-692** | **-967** | **-680** | **-598** | **-383** | **-397** | **-267** |

Source: DECAL Public Register of Providers, CBAER analysis

If children aged 5-11 were to need a paid care arrangement at forecasted levels, there would not be a slot deficit until 2026. This deficit peaks at 967 slots in 2028 before declining to 267 slots in 2033. The maximum class size for school-aged children is 40, meaning that in 2028, at least 24 more classes for school-aged children will have to be created.

## Childcare Costs and Childcare Wages

One of the primary factors limiting the availability of childcare center slots is the cost of services. The industry is in a challenging situation because businesses need to charge fees for their services. These fees are used to pay teachers and staff members wages, purchase supplies, and cover other overhead costs. To meet this objective, providers need to collect revenue.

Revenues come from two primary sources: fees paid by parents or guardians and state or federal subsidies. In Georgia, over 60 percent of the revenue collected by the childcare industry is from parent fees.[49] The remainder of the revenue is generated from state and federal programs, including but not limited to CAPS payments from the Federal Child Care and Development Fund, Georgia's Pre-K program, and the Child and Adult Care Food Program.[50]

The United States Department of Health and Human Services (HHS) defines affordable care as taking no more than seven percent of a household's income, regardless of the number of children in care.[51] To properly examine childcare prices in the GSGR, CBAER used data from the most recent Georgia Child Care Market Rates Survey and public registry data collected by CCR&R of Southeast Georgia to create a weighted average of weekly childcare rates. For more information on the creation of the rates, refer to Appendix C. Table 14 displays the average weekly rates and the percentage of household income spent on childcare, categorized by age group.

**Table 14: Average Weekly Rates for the GSGR 2024**

| Type | Infant (<1) | Toddler (1-2) | Preschool (3-5) | School Age 5+ |
|---|---|---|---|---|
| **Dollars** | $191.52 | $181.91 | $171.30 | $162.67 |
| **Percent Median Household Income** | 14.2% | 13.5% | 12.7% | 12.0% |

Source: Georgia October 2023 Child Care Market Rate Survey, ACS 5-Year Tables, CBAER analysis

When parents or guardians pay the full price of the rates, having one child in childcare exceeds the affordability estimate presented by HHS. Affordability concerns rise as workers with incomes below the median are required to cover the standard childcare rate. For these households, the cost of childcare becomes a larger percentage of their weekly income.

Another factor is that rates change based on the age of the child in care. Infants, who require the highest amount of staffing and equipment, average $28.85 more per week than rates for

[49] *Department of Early Care and Learning. (*2024). *Initial Impact of the COVID-19 Pandemic on Georgia's Early Care and Education Industry.* Department of Early Care and Learning. https://www.decal.ga.gov/documents/attachments/GeorgiaChildCareEconomicImpact_Report_Feb2024.pdf

[50] Ibid.

[51] Child Care and Development Fund (CCDF) Program, 80 F.R. 80466 (proposed December 24, 2015) (to be codified at 45 C.F.R. Part 98). https://www.govinfo.gov/content/pkg/FR2015-12-24/pdf/2015-31883.

school-aged children.[52] For example, if a family making the median household income were to put two toddlers into full-time care, it would amount to 27 percent of their yearly gross income. If a family were to put two infants into full time care, the percentage of yearly gross income spent on childcare would be 28 percent. In both situations, childcare expenses surpass both food and transportation as a percentage of gross income.[53]

Statewide, the average amount paid for care on a weekly basis is higher than the average paid in the GSGR. Households within Georgia that use childcare spend on average, $315 per week on childcare. This is 20 percent of the average household income. For percentages of households with children using paid childcare, Georgia ranks sixth in the USA at 63 percent. Only North Dakota, Iowa, South Dakota, New Jersey, and Washington D.C. have a higher percentage out-of-pocket care payers.[54]

Affordability issues make it difficult for providers to raise fees and increase revenues to cover costs. In practice, providers are limited in the possible wage increases they can afford without finding alternative financial support or creative ways to reduce costs, thereby freeing up resources. This means that addressing compensation, employee benefits, and issues relating to employee turnover is a challenge for the industry. Additionally, employee wages are the largest expense of childcare providers in Georgia.[55]

Both nationally and in the GSGR, childcare worker wages are among the ten lowest compensated occupations.[56] In 2024, the median wage for childcare workers in the GSGR was $13.06 per hour, lower than that of cashiers and other retail workers.[57] These low wages lead to considerable turnover, especially among new hires, creating challenges for the industry in expanding or maintaining service levels.

To illustrate the potential cost of a fee-based increase used to increase employee compensation, CBAER used 2023 childcare price data from the Georgia Childcare Market Rate Survey, the most recent annual median childcare employee wages (2023) from JobsEQ, operating costs from DECAL, and living wage estimates from United for ALICE (Asset Limited, Income Constrained Employed) to estimate the new weekly price of childcare if childcare workers' wages rose to a living wage. The age range of the children used in the analysis was 3-4, as these have the highest teacher-to-student ratios and the lowest private pay fees.

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[52] Georgia Department of Early Care and Learning. (2025). *Rating Rubric for Portfolios: Points for Child Care Centers and Family Child Care Homes*. Georgia Department of Early Care and Learning

[53] U.S. Bureau of Labor Statistics. (2024). *Consumer Expenditure Survey: Annual Report*. U.S. Department of Labor. Retrieved from https://www.bls.gov/cex/

[54] https://www.lendingtree.com/debt-consolidation/child-care-income-study/

[55] *Georgia Department of Early Care and Learning.* 2024.*Wages for Assistant Teachers and Center Directors Vary by Education and Subsidy Participation, but Not by Provider Quality.* Georgia Department of Early Care and Learning*. https://www.decal.ga.gov/documents/attachments/CostofCareReport2_WagesforAssistantTeachersandCenterDirectors.pdf*

[56] JobsEQ by Chmura

[57] Ibid.

This hypothetical wage increase assumes that the workers never collect overtime pay, work 25 hours per week, and do not collect additional non-monetary benefits, such as health insurance or vacation pay. Table 15 presents the average weekly price that families pay for full-time care for a preschooler in GSGR counties, along with the new weekly price if median wages for childcare workers were set at living wages.

**Table 15: 2025 GSGR Counties Current Preschool Weekly Full-Time Price and Living Wage Price**

| County | Average 3–4 Year-Old Weekly Tuition Cost | Industry Median Wage | Livable Wage | 3–4-Year-Old Tuition Cost Paying Livable Wage | Percent Rise in Cost |
|---|---|---|---|---|---|
| Bryan | $183 | $12.63 | $18.68 | $253 | 38% |
| Bulloch | $183 | $12.66 | $14.99 | $252 | 38% |
| Candler | $151 | $11.60 | $14.05 | $219 | 45% |
| Chatham | $183 | $13.64 | $18.29 | $281 | 54% |
| Effingham | $183 | $12.27 | $18.07 | $305 | 67% |
| Evans | $151 | $11.76 | $14.33 | $220 | 46% |
| Liberty | $183 | $12.82 | $16.94 | $277 | 51% |
| Screven | $151 | $11.87 | $13.82 | $212 | 40% |
| **GSGR** | $183 | **$13.06*** | **$16.15** | **$261** | **43%** |

Source: Department of Early Care and Learning *Cost of Childcare Report Part 5,* ALICE Living Wage Calculator, JobsEQ, CBAER analysis
*Weighted average by population of county

The 2025 weekly average price of full-time care for a 3-4 year-old child in the GSGR was $183. This is based on the median wage of a childcare worker, which is $13.06 per hour. If only the pure wages paid to childcare employees rose to the current living wage of the GSGR, as defined by United for ALICE, the average weekly cost of full-time care for a 3-4 year-old child would increase by 43 percent to $261. The living wage information is based on the income of a one adult household with no children. Georgia has one of the lowest annual costs of raising a small child, at $19,162 annually, which is still 16 percent of the average household income.[58] Other states, such as South Carolina, which has an annual cost of $17,699, and Alabama, which costs $17,870 annually, are paying less than 17 percent of their average family income.[59]

[58] *Davis, Shepard.* (2025). *It Costs an Additional $297,674 to Raise a Child Over 18 Years, up 25.3%*. Lending Tree. https://www.lendingtree.com/debt-consolidation/raising-a-child-study/
[59] Ibid.

## Childcare Availability by 2nd and 3rd Shift

The typical worker and childcare provider work during the first shift. This shift can be defined in several ways, but from a childcare standpoint, children arrive before 8:00 a.m. and are picked up after 5:00 p.m., five days a week, typically Monday through Friday. However, some businesses require employees to work outside of these hours. This can take the form of shift work, where employees work odd hours so that the business can be open 24/7, or by adjusting the days of the week that employees are required to work. For example, a weekend schedule is possible with employees working from Wednesday through Sunday. Some employers require employees to be on standby, even when not scheduled, in case the business needs extra support to operate. Across the United States, the prevalence of non-standard working hours decreased between 2015 and 2021, according to the National Health Interview Survey by the U.S. Centers for Disease Control and Prevention.[60] The 2021 survey estimated that 21 percent of individuals participate in this type of work schedule, down from 27 percent in 2015.[61]

CBAER identified available slots for the first (8 a.m.-5 p.m.), second (3 p.m.-11 p.m.), and third shifts (11 p.m-7 a.m.) by analyzing data collected from DECAL. This data is especially relevant to leaders looking to support parents employed in industries that commonly require irregular or extended hours, such as manufacturing, healthcare, and retail. Table 16 provides the licensed childcare slots available for these shifts from the GSGR providers below.

**Table 16: GSGR Providers Licensed Childcare Slots by Shift 2025**

| Shift | Child Care Learning Center Slots | Family Child Care Learning Home Slots |
|---|---|---|
| 1 | 22,692 | 843 |
| 2 | 626 | 72 |
| 3 | 156 | 48 |
| **Total** | **23,474** | **963** |

Source: Decal Public Registry of Providers

Among the licensed slots in the GSGR, childcare is available to parents working second and third shifts; however, availability is limited. If a parent was working the second shift, three percent of the total slots provided are available during those hours. For the third shift, options are even more limited. Under one percent of licensed slots are available during the third shift. However,

[60] Centers for Disease Control and Prevention, *2015*. (2016, September 11). *Niosh Worker Health Charts*. Centers for Disease Control and Prevention. https://wwwn.cdc.gov/NIOSH-WHC/chart/ohs-workorg?T=U&OU=WORKSCHD_RCD&V=R&chk_codes=False

[61] Ibid.

in the United States, the number of workers working the third shift is limited, with just over four percent of workers working this schedule.[62]

If a parent needs childcare in a specific county during the second and third shifts, options are limited and can be non-existent. Parents working the second shift can only secure childcare in Bulloch, Chatham, Effingham, and Liberty Counties. If their child's best match is a family care environment, this narrows to Chatham, Effingham, and Liberty Counties. For parents working the third shift, options are even narrower. Only providers in Chatham, Effingham, and Liberty have posted hours during these shifts. Any parents located in Bryan, Candler, Evans, or Screven Counties who work alternative shifts have zero licensed childcare options.

[62] Ibid.

# Industry Development Challenges

In the GSGR, demand for childcare is strong and is expected to continue increasing over the next decade. This growing need for childcare will be met by both existing and new providers in this area. Many challenges exist in the GSGR as the childcare industry adjusts to new demand patterns. One of the most pressing issues is that several existing providers in the industry have recently closed, as changes to state funding have impacted their business models. These closures have increased the stakes for the remaining providers and highlighted concerns that current industry participants are not adequately prepared for the impending increase in demand.

To ensure that this report accounts for changes in the current market that are not reflected in existing databases, CBAER has conducted interviews with six providers. These providers, and others, were identified by Child Care Resource and Referral of Southeast Georgia (CCR&R), located at Savannah Tech, as receiving a two or three-star rating from Georgia's Quality Rated System. These interviews included both CCLCs and FCCLHs. Providers ranged in size from six licensed slots to over 150 licensed slots. The providers that spoke with CBAER are Kid's World Learning Center, Rashida's DayCare, Rudette Sands, Dream Builders Learning Center, Little Blessyn's Childcare Learning Center and The Learning Treehouse.

In the remainder of this section, CBAER will present the findings of these discussions. The information has been combined to ensure the confidentiality of the participants. Additionally, the interviews were conducted using an open-ended format, allowing participants to provide their views on the current state of the childcare industry with wide latitude. Based on interview responses, previously mentioned survey data, local and state regulations, and other reports, CBAER has identified four major areas that act as constraints or limitations, making childcare expansion more challenging than business expansion in other industries.

## Affordable vs. High-Quality Care

The high-quality providers CBAER interviewed understood how quality services benefit the children they serve while affordability benefits the parents of those children. They knew how quality childcare raises a child's literacy, socialization, and mathematics skills.[63] As such, maintaining quality of care for the children in their care was the priority. For parents and guardians, affordable and high-quality childcare options enable them to pursue better employment opportunities, education, or training with the assurance that their child is in a safe and nurturing environment.[64] The career opportunities offered by quality childcare enable

[63] Yazejian et al. (2017) *Child and Parenting Outcomes After One Year of Educare.* Child Development, 88, 1671-1688. http://dx.doi.org/10.1111/cdev.12688

[64] Committee for Economic Development. (2024). (rep.). *Child Care in State Economies – 2024 A Report Series Part 3: Child Care and Regional Economic Growth*. Retrieved January 28, 2025, from https://cdn2.assets-servd.host/ced-microsite/production/documents/241002_CCSE-2024-Report_Part-3_Final.pdf?dm=1733774339.

greater overall workforce participation and educational attainment, particularly for women.[65] Providers were aware of this and sought to offer affordable care for the parents while maintaining quality for the children.

## Governmental Support and Assistance

A major tool that many providers rely on to maintain the affordability and viability of their businesses is outside funding from the state and federal government. All but one of the providers interviewed by CBAER actively encouraged their clients to apply for assistance programs. In Georgia, the primary source of government assistance for childcare is through the CAPS program, which has recently experienced significant fluctuations in federal government funding. CAPS in Georgia expanded its eligibility in 2021 to serve 50,000 children, increasing the entry income threshold to 85 percent of the state's median income.[66]

This expansion, which lasted until October 2024, was funded by the American Rescue Plan Act (ARPA), a component of the COVID-19 federal relief funding. Once extra federal funding terminated, Georgia had to scale back the amount of assistance provided. Many of the providers had come to rely on CAPS funding to remain profitable and support employee wages. Once the assistance scaled back, they faced a difficult dilemma of either lowering employee compensation or raising tuition. All providers interviewed by CBAER successfully navigated this dilemma but were also aware of many providers that did not succeed.

## Financing/Growth Management

Quality providers are well connected to their parent networks and are aware of who in their community cannot access childcare. Most of the providers CBAER interviewed expressed interest in expansion but were hesitant because they did not want to “overextend” their business. They mentioned that they had trouble securing financing for expansions, staffing expansions, and maintaining expansions. Providers indicated that the early days of a new childcare business or expansion were more stressful because there was more direct supervision required.

To manage the extra workload, some providers had to temporarily suspend services for certain groups of children while the expansion was underway. Issues with securing financing for their expansion are linked to the unique and unstable revenue streams prevalent in their industry. Providers who had to temporarily suspend some services were especially hard hit, as the resulting loss of revenue made financing much more difficult. The difficulty in securing affordable loans, combined with the volatile nature of revenue in the childcare industry, had

[65] Ibid.

[66] Georgia Department of Early Care and Learning. ( 2021). *Georgia Increasing Children Served through CAPS program by 10,000 and Expands Eligibility.* Georgia Department of Early Care and Learning. https://www.decal.ga.gov/documents/attachments/release_CAPS%20expansion%2010-15-2021.pdf

providers hesitant to take on debt for expansion. They also reported stories of other providers who expanded too quickly, "overextended," and ultimately went out of business.

## Access to Labor

Adequate staffing is crucial to childcare quality and has been acknowledged as a key factor by Georgia's quality rating system, as evidenced by its child-to-staff ratios.[67] All the providers CBAER interviewed indicated that hiring and retaining qualified employees were barriers to ongoing operations or potential expansion. Childcare employees require more extensive credentials and background checks than employees in other sectors, yet they often earn less, which contributes to higher turnover.[68,69] As stated earlier, providers are limited in reducing turnover by simply raising wages, especially if they want to maintain affordability for parents. Most of the providers interviewed expressed interest in developing a relationship with local early childhood education (ECE) training programs, such as Savannah Tech, Ogeechee Tech, and high school ECE programs. This relationship would establish a more reliable pool of qualified candidates who have expressed interest in childcare.

[67] Georgia Department of Early Care and Learning. (2025). *Rating Rubric for Portfolios: Points for Child Care Centers and Family Child Care Homes*. Georgia Department of Early Care and Learning

[68] *Staff qualifications and required training*. ChildCare.gov. (n.d.). https://childcare.gov/consumer-education/staff-qualifications-and-required-trainings

[69] JobsEQ by Chmura

# Childcare Best Practices

This section covers best practices and tested solutions that both quality providers and other leaders have implemented to expand or support their local childcare industry. For best practices in childcare, CBAER utilized information gathered from interviews with GSGR childcare businesses. This includes information on how quality providers managed their common challenges. CBAER also reviewed other reports to find local communities that successfully supported and expanded their childcare industries

## Childcare Businesses

A key aspect of a successful childcare business is family and community involvement. Several of the successful quality providers CBAER interviewed emphasized that an atmosphere of trust and a sense of family were crucial to delivering high-quality care and sustaining their businesses. The involvement of parents fosters loyalty to providers and supports the development of parenting skills that parents can use at home.

Strong relationships with parents/guardians also alleviate some of the stresses to the provider, such as problematic behavior and securing resources for children with special needs. A provider with strong bonds to the families in their care also gains a network of parents to advertise and recommend their business to other community members. Many quality providers interviewed by CBAER utilized and monitored social media groups to better tailor and advertise their services.

Expanding providers typically maintained their core facilities and expand into a new independent facility. CBAER interviews indicated two main reasons for this approach. First, a separate facility, instead of an extra wing or renovations, allowed the business to operate while simultaneously expanding. Second, the first facility provided a stable core of employees and parents to help maintain the entire business while attention was spent on the new expansion. This helps ease the financial distress caused by a new expansion and allows the provider to focus on alleviating labor issues during the process.

Quality employees are crucial to any successful childcare provider. Quality providers interviewed by CBAER took multiple approaches to finding passionate employees. These approaches varied across operations and communities served. Providers in small towns involved themselves in community events focused on children and actively sought out employees at these events. All the providers included in the analysis focused on developing a strong reputation as good employers and utilizing online recruiting to attract candidates. Others have established working relationships with the local high schools or technical schools to offer internships and practical experience to students.

Interviewed providers also worked to preserve and support employees. The quality providers interviewed by CBAER offered special care and practices to support new teachers in minimizing turnover. First, no providers assign a new employee to care for infants or toddlers. Second,

providers maintained a core of experienced teachers who can aid and sympathize with new employees. These experienced teachers can then mentor the new employees, alleviating some of their stress. CBAER interviews indicated that once three to six months of employment have passed, quality providers may offer multiple incentives to retain these employees, such as extra training, yearly pay increases, and pay increases for obtaining additional credentials. All providers fostered a sense of community among their employees through various means, including branded merchandise, faculty appreciation events, and flexible work hours.

## Local Leaders

Although a great deal of childcare policy research focuses on the state and federal level, local governments and communities can support the development of additional childcare resources. These policies can include supporting local providers by offering additional technical assistance resources specifically designed to help them operate more effectively. Additionally, developing strong networking and information-sharing practices within the local industry is an important way communities can help develop additional childcare providers. It is possible to adjust local rules and regulations to better serve the needs of childcare businesses. Employers are best positioned to provide care during non-traditional hours by providing or contracting on-site or near-site care. Finally, local leaders can develop grassroots grant programs that can help cover small expenditures made by providers. These are just a few of the ways that local leaders and governments can help support the development of additional childcare providers in their region.

Some of the technical assistance services and network development efforts are already underway due to the work of CCR&R of Southeast Georgia, located at Savannah Technical College. By proposing the development of additional resources in this area childcare providers will have more opportunities to connect with the technical assistance process. The CCR&R of Southeast Georgia is limited in what technical assistance it can provide. Currently, their technical assistance is limited to providers actively participating in the quality rating program.[70] Additionally, CCR&R cannot provide technical assistance to help providers effectively advocate to lawmakers, and its services are not specifically tailored to one type of provider.[71] To support the efforts of new providers entering the industry, the childcare industry's support network must grow in tandem with other industries in the GSGR.

To support the new providers needed, more resources should be dedicated to providing technical assistance in childcare practices, business practices, and advocacy. As stated earlier, the technical assistance offered by the CCR&R of Southeast GA is limited in scope and spread across a region larger than the GSGR. The new providers needed in the area present an opportunity for more and different groups to offer tailored technical assistance in the region.

[70] Child Care Resource and Referral of Southeast Georgia. (n.d) *About Us.* CCRR of Southeast Georgia. https://www.ccrrofsoutheastga.org/about-us
[71] Ibid.

One network that could provide a model for development in the GSGR is the Manpower Development Corporation of North Carolina, specifically its Home-Based Child Care Haven program. The Haven program is tailored to assist Family Child Care Learning Homes in improving quality, managing their business, creating provider networks, and advocating for policy changes.[72] Expanding technical assistance resources by creating or bringing more networks to the GSGR can better connect GSGR providers with the technical assistance they need.

Another way local communities can support the childcare industry is by establishing information-sharing networks among childcare providers. A network of providers can offer counseling to new providers in the region, and provide a forum for discussing community trends, local policies, and general best practices. None of the providers CBAER interviewed were aware of an extensive local network and felt isolated in their challenges. A robust network, such as MDC's Haven program, can also help bring unlicensed providers into the formal childcare system by assisting them in navigating the licensing process.

Local leaders can also collaborate further to adjust local rules and regulations, helping childcare providers operate more effectively. For example, a standardization of zoning regulations across the GSGR can simplify the process of starting a childcare business. A local example is how the City of Pembroke changed their zoning law to add childcare providers as a conditional use of residentially zoned buildings. Other state-level examples are California's Senate Bill 234, which allows family childcare homes to operate in all residential buildings, including multi-family homes.[73] Many providers operate out of modified housing. Allowing providers access to residential properties after a review by the local government can increase the available buildings for providers to expand.

Finally, local leaders can develop grassroots grant programs to help cover small expenditures made by providers, alleviating some of the financial stresses of running a childcare business. Examples of these programs include Maryland's Family Child Care Provider Grant Program, which reimburses FCCLHs up to $500 for start-up costs, such as licensing or repairs related to water, sewer, fire, and health requirements.[74] A notable example is All Our Kin's microloan program, which offers zero-interest loans ranging from $2,000 to $5,000 for facility improvements.[75] Flexible options to repay the loans have enabled providers to successfully refill the initial fund, creating a closed system making no new investment into the program

[72] MDC. (nd.) *Home Based Child Care Haven.* "MDCINC." https://mdcinc.org/hbcc-haven/
[73] *All Our Kin.* (2019) *Creating the Conditions for Family Child Care to Thrive: Strategies for Increasing the Supply, Quality, and Sustainability of Family Child Care in States and Communities.* All Our Kin. https://allourkin.org/files/galleries/Family_Child_Care_to_Thrive.pdf
[74] *The Bipartisan Policy Center*. (2019) Early Learning Facilities Workgroup. From the Ground Up: Improving Child Care and Early Learning Facilities. The Bipartisan Policy Center. https://bipartisanpolicy.org/wp-content/uploads/2019/07/From-the-Ground-Up-Improving-Child-Care-and-Early-Learning-Facilities.pdf
[75] *All Our Kin.* (2019) *Creating the Conditions for Family Child Care to Thrive: Strategies for Increasing the Supply, Quality, and Sustainability of Family Child Care in States and Communities.* All Our Kin. https://allourkin.org/files/galleries/Family_Child_Care_to_Thrive.pdf

necessary.[76] Whether it is a small grant or loan program, it is imperative that the agency administering the funds specializes in childcare and has a trusted relationship with the providers it supports.

## Employers Role in Childcare

Local employers are in the best position to expand the amount of non-standard hour care in the community. The demand for care during non-standard hours is closely tied to the work schedules that employers give.[77] Non-traditional schedules are concentrated in industries such as retail, healthcare, and manufacturing.[78]

Employers can build or contract childcare providers to specifically provide care for their employees during their shifts. A provider closely coordinating with an employer that uses non-traditional schedules can reliably staff and fill their center. A recent example of a close employer-provider partnership is the Tyson Tykes program in Humboldt, Tennessee. The five million dollar facility employs 20 childcare workers and has slots for 100 children.[79] Tyson Foods built the facility to support the 1,500 employees at the poultry processing plant, but an outside agency, KinderCare, operates the program. Tyson Foods also subsidizes the tuition for its employees, maintaining affordability for parents and enrollment for the facility.[80] Employers looking to replicate this program can use multiple tax incentives to help finance the creation of a provider. Georgia offers the Employer's Credit for Purchasing Child Care Property to help employers create childcare facilities.[81] The tax credit allows employers in the state to fully fund the process of obtaining a facility (either new or previously owned) for the purpose of supplying childcare to their employees.[82] A similar credit is offered by the federal government, known as the Employer-Provided Child Care tax credit, that provides for 25 percent of the expenses to obtain a facility or 10 percent to utilize an outside provider.[83]

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[76] Ibid.
[77] *Derrick-Mills et al.* (2024). *Understanding the Need for Nontraditional-Hour Child Care in Georgia.* Urban Institute. https://www.urban.org/sites/default/files/2024-02/Understanding%20the%20Need%20for%20Nontraditional-Hour%20Child%20Care%20in%20Georgia.pdf
[78] Ibid.
[79] Tyson Foods (2023) *Tyson Foods Celebrates Grand Opening of Child Care Facility.* "News". https://www.tysonfoods.com/news/news-releases/2023/7/tyson-foods-celebrates-grand-opening-child-care-facility
[80] Ibid.
[81] O.C.G.A. § 48-7-40.6
[82] *Derrick-Mills et al.* (2024). *Understanding the Need for Nontraditional-Hour Child Care in Georgia.* Urban Institute. https://www.urban.org/sites/default/files/2024-02/Understanding%20the%20Need%20for%20Nontraditional-Hour%20Child%20Care%20in%20Georgia.pdf
[83] Ibid.

# Conclusion and Next Steps

The childcare industry is making a significant economic contribution to the Greater Savannah, Georgia Region (GSGR). This report examined the current state of the industry and how the additional demand for employees, which may encourage transfers from other jobs within or outside of the region, would impact the industry. First, CBAER analyzed the current (baseline) and future potential population growth (due to new industrial jobs). Outlined in Table 17 are the findings from the baseline forecast of population and the projected future growth associated with the new jobs entering the region.

**Table 17: GSGR Total Populations for 2024, 2028, 2033**

| | Baseline Growth | Potential Growth | Additional Population |
|---|---|---|---|
| Total Population | | | |
| 2024 | 623,516 | 623,516 | 0 |
| 2028 | 659,414 | 691,415 | 32,001 |
| 2033 | 701,593 | 733,647 | 32,054 |
| Age 0-14 Total | | | |
| 2024 | 115,535 | 115,535 | 0 |
| 2028 | 116,635 | 120,736 | 4,101 |
| 2033 | 118,160 | 120,705 | 2,545 |
| Age 0-14 in Childcare | | | |
| 2024 | 21,260 | 21,260 | 0 |
| 2028 | 22,084 | 26,185 | 4,101 |
| 2033 | 22,041 | 24,707 | 2,666 |

Source: CBAER Analysis

In terms of total population growth, the new industrial jobs coming to this region will have an impact. This forecast is comprehensive because it includes both the total population and the age groups that are likely to need some form of childcare. It includes both the total number of children aged 0-14 and the number using childcare. However, it is also conservative, as it only includes children who require paid childcare from a licensed provider. This means that the figure does not include children who may be in full-time care from a parent, friend, family member, or neighbor and are not using care from the formal childcare industry.

Between 2024 and 2033, the total population of the GSGR is projected to increase to 733,647 people. This is 110,131 more people in the GSGR than in 2024. To put this population figure into context, it is equivalent to adding the population of a small city, such as Ann Arbor, Michigan, to the region.[84] Of the 2033 population, 120,706 will be children aged 0-14. The combination of extra jobs and natural population growth is expected to result in an additional 4,925 children

[84] U.S. Census Bureau, U.S. Department of Commerce. (2023). Total Population. *American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B01003*. Retrieved May 21, 2025, from https://data.census.gov/table/ACSDT1Y2023.B01003?q=Population+Total&g=160XX00US2603000.

needing formal childcare in 2028 and 3,447 more in 2033 when compared to 21,260 in 2024. This poses a significant challenge for the childcare industry over the next decade.

Next, the analysis focused on the number of currently licensed childcare providers in the GSGR. The Georgia Department of Early Care and Learning (DECAL) licenses childcare providers based on the available square footage, type of provider, and the age of the children being cared for. These licensed slots are the maximum number of children the industry can provide care for in this region. Table 18 details the number of slots available for infants, toddlers, and preschoolers aged 0-14 years in each GSGR county for 2025.

**Table 18: GSGR Counties 2025 Total Licensed Slots**

| County | Infant | Toddler | Preschool to Age 14 | Total |
|---|---|---|---|---|
| Bryan | 184 | 617 | 558 | 1,359 |
| Bulloch | 170 | 459 | 1,359 | 1,988 |
| Candler | 4 | 44 | 128 | 176 |
| Chatham | 868 | 2,609 | 11,055 | 14,532 |
| Effingham | 204 | 609 | 2,263 | 3,076 |
| Evans | 8 | 16 | 105 | 129 |
| Liberty | 138 | 319 | 2,283 | 2,740 |
| Screven | 38 | 44 | 355 | 437 |
| **Total** | **1,614** | **4,717** | **18,106** | **24,437** |

Source: Decal Public Registry of Providers

The number of slots refers to the maximum number of children that can be cared for by providers in the region according to their license. Notably, this does not mean that it is the number of childcare slots the provider is offering to the public. The number of children in care will always be lower than the number of slots. Childcare providers may not take as many children into their center as their license allotment due to issues with staffing, facilities, or other reasons. This difference between children in care and potential childcare slots by license allotment illustrates that other factors may be limiting the amount of available care in this market.

The upper limit of available childcare in the region aligns with the population receiving care in 2024. Using either figure, it is clear that childcare providers in the region are meeting some of the demand for care in this market. Based on CBAER conversations with childcare providers, the amount of available care is currently being constrained by a lack of available labor and financial resources. Providers reported that staff turnover is a problem that limits the amount of care that can be provided. Additionally, providers are limited in the fees they can charge their parents and guardians due to the budgetary limitations of these households. CBAER recommends that providers recruit employees and parents from areas with individuals who have expressed a commitment to caring for small children, such as local early childhood

education programs, community events focused on children, school board meetings, and among retiring teachers. Providers can also find opportunities to raise fees by offering targeted discounts to struggling families and helping them access state subsidies through the CAPS program.

Next, CBAER examined the slots by age by further breaking down the population forecast of children aged 0-14 into five groups: infants (less than one), toddlers (between 1-3), preschool (between 3-5), school-age 1 (between 5-12), and school-age 2 (12-14). Using the population forecast, CBAER determines the number of slots required to care for children in need of paid childcare for the years 2025-2033. Table 19 details the results.

**Table 19: GSGR Total Slots Needed to Meet Demand 2025, 2028, 2033**

| | 2025 | 2028 | 2033 |
|---|---|---|---|
| Total Licensed Slots | 24,437 | 26,185 | 24,707 |
| Infants (less than 1) | 1,614 | 3,137 | 3,140 |
| Toddler (age 1-3) | 4,717 | 6,135 | 6,098 |
| Pre-School (age 3-5) | 7,613 | 5,396 | 4,770 |
| School Age 1 (age 5-12) | 8,935 | 9,815 | 9,117 |
| School Age 2 (age 12-14) | 1,558 | 1,702 | 1,582 |

Source: CBAER Analysis

Natural population growth and the creation of additional jobs will cause the number of children in need of paid care to peak in 2028. The number of infant slots requested will nearly double, and toddler care will increase by 30 percent. From an economic standpoint, keeping these parents or guardians in the labor force is very important because the time they take off to care for their children can significantly reduce their lifetime earnings. For example, if a 26-year-old person making the GSGR median salary of $55,000 were to take only one year off to care for their infant, they would lose a total of $201,180 in income over the course of their lifetime.[85,86] These effects greatly increase for any additional years that a parent must take off. For example, if that parent had to take five years off to care for their child until they were school-age, they would lose $883,472 over the course of their life.[87]

Looking ahead to 2033, 24,707 slots will be needed to meet demand if childcare were to be as accessible as it is in 2024. As mentioned earlier, most of the growth in children requiring paid care from 2024-2033 is due to new parents entering the workforce to fill the new jobs being created in the region. The children of these parents will eventually become old enough to no longer need childcare. Therefore, the year that will need the greatest number of slots is 2028.

[85] Center for American Progress. (2016). Interactive: *The Hidden Cost of a Failing Child Care System.* "Interactives: Child Care Costs." https://interactives.americanprogress.org/childcarecosts/
[86] JobsEQ by Chmura
[87] Center for American Progress. (2016). Interactive: *The Hidden Cost of a Failing Child Care System.* "Interactives: Child Care Costs." https://interactives.americanprogress.org/childcarecosts/

The number of children in need of care over the next 10 years is expected to quickly exceed the maximum capacity, with the shortage peaking in 2028, but still remaining above total slots through 2033. Expanding the number of slots in the GSGR and/or lowering the cost of childcare will increase childcare accessibility to more parents. If affordable, quality childcare was to become more accessible over the next ten years, more parents could decide to put their children into care. Finally, preschool-aged children will have enough slots to care for the number of those needing paid care in 2028 and 2033.

In 2025, slots totaled 24,437; infant and toddler care exhibited evidence of a supply shortfall. CBAER used the classroom size regulations for each of these groups to determine how many extra classrooms would be needed in the years 2025, 2028, and 2033 to accommodate all infants and toddlers requiring paid childcare. Table 20 details the results.

**Table 20: GSGR Classrooms Needed to Care for Infants and Toddlers 2025, 2028, and 2033**

| | 2025 | 2028 | 2033 |
|---|---|---|---|
| Total Licensed Classrooms | 58 | 213 | 211 |
| Infants (less than 1) | 57 | 125 | 125 |
| Toddler (age 1-3) | 1 | 88 | 86 |

Source: CBAER Analysis

Combined, the data indicates that demand for childcare in the GSGR will be strong over the next ten years. This increasing need for childcare will be met by both existing and new providers in this area. Many challenges exist in the GSGR as the childcare industry adjusts to new demand patterns. The biggest challenges facing providers are balancing quality and affordability, securing financing, and hiring and retaining qualified employees.

To provide guidance on how childcare providers can overcome these challenges, CBAER conducted interviews with six quality rated providers identified by the Child Care Resource and Referral Agency of Southeast Georgia as having rated two or three stars with Georgia's Quality Rated system. Providers interviewed included both CCLCs and FCCLHs, ranged in licensed slots from six to over 150 and are rated by Georgia's quality rating system at the highest rank of three stars.

Quality providers strike a balance between quality and affordability by offering financial assistance to parents and carefully expanding their services. Financial assistance sometimes took the form of specific discounts to families with children already enrolled in their program or helping families secure state subsidies for childcare. Careful expansion involved maintaining or slightly shrinking the main facility operations and expanding to a wholly separate facility. This allows providers to maintain revenue while expanding. To secure financing, providers should have comprehensive accounting and business plans. To hire qualified employees, providers should form relationships with their community and the local early childhood education programs. To retain those employees, providers should offer benefits such as professional

development opportunities, modest yearly wage increases, training-related wage increases, flexibility in hours, company merchandise, and faculty appreciation events.

CBAER also conducted a comprehensive literature review that included industry research and examples of regions successfully supporting childcare providers to provide a list of recommendations and actionable items. These are as follows:

- First, Additional support networks should be created to better connect GSGR providers connected to technical assistance resources. CCR&R of Southeast Georgia currently offers technical assistance, but its scope and focus are limited. A GSGR-focused provider network, similar to MDC's Haven program in North Carolina or All Our Kin in Connecticut, can help connect or offer providers, especially FCCLHs, with technical assistance resources. These networks can also connect providers with additional training workshops and hiring tools. A new provider network focused on the GSGR can also organize advocacy efforts that the CCR&R is legally prohibited from doing.

- Next, foster closer relationships between providers and Early Childhood Education (ECE) programs, and the public school system. Local providers can offer a practicum for students in high school and post-secondary ECE programs, establishing a training relationship with potential future employees. A relationship with the public school system can allow educators to retire or leave the school system for employment where they can still work with children. CBAER recommends that providers, local officials, provider networks, and technical college representatives form a strategic plan to advertise and form these relationships

- Local employers are best positioned to expand the availability of childcare during non-standard hours by creating or contracting on-site or near-site childcare. Employers can follow the example of Tyson Foods in Humboldt Tennessee. Tyson Foods built a facility for 100 children and contracted its operation to KinderCare to support its 1,500 workers in its Humboldt plant. Tyson Foods also subsidized tuition to its workers to ensure affordability for parents and enrollment for the facility. Several tax incentives such as Georgia's Employer's Credit for Purchasing Child Care Property or the federal government's Employer-provided Child Care Tax Credit to help finance the creation or purchase of a facility. If an employer is looking to establish a preferred provider relationship for its employees, the relationship must involve reservation payments or subsidies to the preferred provider, especially if non-standard hours of care is needed.

- Zoning laws can be changed to facilitate the creation of new providers. Standardization of zoning laws across the GSGR can allow providers to more easily expand operations. A local example is how the City of Pembroke changed their zoning law to allow childcare providers to operate out of residential areas. Another, state-level, example is California

Senate Bill 234, which allows family childcare homes to operate in all residential buildings, including multi-family homes.[88]

- Finally, local leaders can develop aid programs to help cover small expenditures made by providers, reducing some of the financial stresses of running a childcare business. One example is the Maryland Family Child Care Provider Grant Program, which reimburses FCCLHs up to $500 for start-up costs, such as licensing or repairs related to water, sewer, fire, and health requirements.[89] Another notable example is All Our Kin's microloan program, which offers zero-interest loans ranging from $2,000 to $5,000 for facility improvements.[90] All Our Kin's close relationships with their providers lead to a high repayment rate on these loans. A starting expense to begin administering this aid would be to cover the licensing fees of GSGR providers, which can range from $50 to $250 per provider.[91] Whether it is a small grant or loan program, it is imperative that the agency administering the funds specializes in childcare and has a trusted relationship with the providers it supports.

These efforts can benefit childcare providers, families, community leaders, and employers alike. All of these stakeholders have respective concerns with the current childcare market and are interested in developing quality and affordable childcare. The increasing demand for childcare will impact the childcare industry and could increase the impact of the current challenges discussed in this report. Therefore, supporting both childcare providers and families is critical for helping both families succeed and aiding economic growth throughout the GSGR.

[88] *All Our Kin.* (2019) *Creating the Conditions for Family Child Care to Thrive: Strategies for Increasing the Supply, Quality, and Sustainability of Family Child Care in States and Communities.* All Our Kin. https://allourkin.org/files/galleries/Family_Child_Care_to_Thrive.pdf
[89] *The Bipartisan Policy Center*. (2019) Early Learning Facilities Workgroup. From the Ground Up: Improving Child Care and Early Learning Facilities. The Bipartisan Policy Center. https://bipartisanpolicy.org/wp-content/uploads/2019/07/From-the-Ground-Up-Improving-Child-Care-and-Early-Learning-Facilities.pdf
[90] Ibid.
[91] *Georgia Department of Early Care and Learning. (n.d)*. *License Fee Information.* "Child Care Services". https://www.decal.ga.gov/CCS/licensefeeinformation.aspx

# Appendix A: Data Tables

**Appendix Table 1: Baseline Population Projections By County 2014-2023**

| County | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|---|---|---|---|
| Bryan | 33,664 | 34,792 | 35,839 | 36,999 | 38,059 | 39,627 | 45,043 | 46,974 | 48,218 | 49,739 |
| Bulloch | 72,651 | 73,116 | 74,642 | 75,991 | 77,242 | 79,608 | 79,922 | 80,671 | 83,038 | 84,327 |
| Candler | 10,865 | 10,873 | 10,849 | 10,706 | 10,827 | 10,803 | 11,022 | 10,947 | 10,962 | 11,059 |
| Chatham | 282,201 | 285,959 | 288,615 | 289,309 | 289,166 | 289,430 | 295,089 | 295,690 | 301,025 | 303,655 |
| Effingham | 55,410 | 57,076 | 58,699 | 60,086 | 62,228 | 64,296 | 65,169 | 66,764 | 69,034 | 71,541 |
| Evans | 10,811 | 10,690 | 10,648 | 10,741 | 10,702 | 10,654 | 10,792 | 10,697 | 10,659 | 10,754 |
| Liberty | 64,091 | 61,611 | 61,473 | 61,619 | 60,606 | 61,435 | 65,317 | 66,800 | 67,919 | 69,210 |
| Screven | 14,002 | 14,059 | 14,003 | 13,956 | 13,960 | 13,966 | 14,077 | 14,062 | 13,970 | 14,174 |
| **Total** | **543,695** | **548,176** | **554,768** | **559,407** | **562,790** | **569,819** | **586,431** | **592,605** | **604,825** | **614,459** |

**Appendix Table 2: Baseline Population Projections by County 2024-2033**

| County | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 |
|---|---|---|---|---|---|---|---|---|---|---|
| Bryan | 50,696 | 52,473 | 54,253 | 56,036 | 57,808 | 59,573 | 61,328 | 63,080 | 64,825 | 66,568 |
| Bulloch | 85,704 | 87,061 | 88,414 | 89,761 | 91,083 | 92,386 | 93,669 | 94,939 | 96,197 | 97,446 |
| Candler | 11,049 | 11,075 | 11,099 | 11,122 | 11,141 | 11,157 | 11,170 | 11,181 | 11,190 | 11,197 |
| Chatham | 310,132 | 313,570 | 316,984 | 320,368 | 323,657 | 326,871 | 330,005 | 333,093 | 336,128 | 339,132 |
| Effingham | 73,241 | 75,100 | 76,960 | 78,819 | 80,660 | 82,488 | 84,300 | 86,104 | 87,897 | 89,686 |
| Evans | 10,829 | 10,852 | 10,873 | 10,892 | 10,908 | 10,920 | 10,930 | 10,937 | 10,943 | 10,947 |
| Liberty | 67,462 | 68,021 | 68,573 | 69,118 | 69,641 | 70,148 | 70,636 | 71,113 | 71,579 | 72,038 |
| Screven | 14,403 | 14,435 | 14,465 | 14,493 | 14,516 | 14,535 | 14,549 | 14,562 | 14,571 | 14,579 |
| **Total** | **623,516** | **632,587** | **641,621** | **650,609** | **659,414** | **668,078** | **676,587** | **685,009** | **693,330** | **701,593** |

**Appendix Table 3: Baseline Child Population Aged 0-14 for GSGR Counties 2014-2023**

| County | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|---|---|---|---|
| Bryan | 6,780 | 6,937 | 7,099 | 7,252 | 7,417 | 7,657 | 8,788 | 9,058 | 9,206 | 9,359 |
| Bulloch | 14,632 | 14,578 | 14,786 | 14,894 | 15,053 | 15,383 | 15,594 | 15,555 | 15,854 | 15,868 |
| Candler | 2,188 | 2,168 | 2,149 | 2,098 | 2,110 | 2,087 | 2,151 | 2,111 | 2,093 | 2,081 |
| Chatham | 56,837 | 57,016 | 57,171 | 56,703 | 56,353 | 55,928 | 57,576 | 57,015 | 57,473 | 57,139 |
| Effingham | 11,160 | 11,380 | 11,627 | 11,777 | 12,127 | 12,424 | 12,715 | 12,874 | 13,180 | 13,462 |
| Evans | 2,177 | 2,131 | 2,109 | 2,105 | 2,086 | 2,059 | 2,106 | 2,063 | 2,035 | 2,024 |
| Liberty | 12,908 | 12,284 | 12,177 | 12,077 | 11,811 | 11,871 | 12,744 | 12,880 | 12,967 | 13,023 |
| Screven | 2,820 | 2,803 | 2,774 | 2,735 | 2,721 | 2,699 | 2,747 | 2,711 | 2,667 | 2,667 |
| **Total** | **109,502** | **109,297** | **109,892** | **109,641** | **109,678** | **110,108** | **114,421** | **114,267** | **115,475** | **115,623** |

**Appendix Table 4: Baseline Child Population Aged 0-14 for GSGR Counties 2024-2033**

| County | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 |
|---|---|---|---|---|---|---|---|---|---|---|
| Bryan | 9,394 | 9,597 | 9,806 | 10,018 | 10,225 | 10,425 | 10,616 | 10,805 | 11,005 | 11,211 |
| Bulloch | 15,881 | 15,922 | 15,981 | 16,047 | 16,110 | 16,167 | 16,214 | 16,263 | 16,330 | 16,412 |
| Candler | 2,047 | 2,025 | 2,006 | 1,988 | 1,971 | 1,952 | 1,933 | 1,915 | 1,900 | 1,886 |
| Chatham | 57,466 | 57,348 | 57,296 | 57,273 | 57,247 | 57,200 | 57,123 | 57,057 | 57,061 | 57,115 |
| Effingham | 13,571 | 13,735 | 13,911 | 14,091 | 14,267 | 14,435 | 14,592 | 14,749 | 14,921 | 15,105 |
| Evans | 2,007 | 1,985 | 1,965 | 1,947 | 1,929 | 1,911 | 1,892 | 1,874 | 1,858 | 1,844 |
| Liberty | 12,500 | 12,440 | 12,395 | 12,356 | 12,318 | 12,275 | 12,227 | 12,181 | 12,151 | 12,132 |
| Screven | 2,669 | 2,640 | 2,615 | 2,591 | 2,567 | 2,543 | 2,518 | 2,494 | 2,474 | 2,455 |
| **Total** | **115,535** | **115,692** | **115,975** | **116,311** | **116,634** | **116,908** | **117,115** | **117,338** | **117,700** | **118,160** |

**Appendix Table 5: Baseline Children in Paid Childcare For GSGR Counties 2014-2023**

| County | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|---|---|---|---|
| Bryan | 1,234 | 1,076 | 1,318 | 1,354 | 1,269 | 1,321 | 1,754 | 978 | 1,223 | 1,656 |
| Bulloch | 2,663 | 2,261 | 2,745 | 2,781 | 2,576 | 2,654 | 3,113 | 1,679 | 2,106 | 2,808 |
| Candler | 398 | 336 | 399 | 392 | 361 | 360 | 429 | 228 | 278 | 368 |
| Chatham | 10,343 | 8,841 | 10,613 | 10,589 | 9,645 | 9,651 | 11,493 | 6,155 | 7,634 | 10,111 |
| Effingham | 2,031 | 1,765 | 2,159 | 2,199 | 2,075 | 2,144 | 2,538 | 1,390 | 1,751 | 2,382 |
| Evans | 396 | 331 | 392 | 393 | 357 | 355 | 420 | 223 | 270 | 358 |
| Liberty | 2,349 | 1,905 | 2,261 | 2,255 | 2,021 | 2,049 | 2,544 | 1,390 | 1,723 | 2,305 |
| Screven | 513 | 435 | 515 | 511 | 466 | 466 | 548 | 293 | 354 | 472 |
| **Total** | **19,927** | **16,950** | **20,402** | **20,474** | **18,770** | **19,000** | **22,839** | **12,336** | **15,339** | **20,460** |

**Appendix Table 6:Baseline Children in Paid Childcare For GSGR Counties 2024-2033**

| County | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 |
|---|---|---|---|---|---|---|---|---|---|---|
| Bryan | 1,729 | 1,760 | 1,828 | 1,864 | 1,936 | 1,969 | 2,016 | 2,031 | 2,079 | 2,091 |
| Bulloch | 2,922 | 2,920 | 2,980 | 2,986 | 3,051 | 3,054 | 3,079 | 3,056 | 3,085 | 3,061 |
| Candler | 377 | 371 | 374 | 370 | 373 | 369 | 367 | 360 | 359 | 352 |
| Chatham | 10,575 | 10,517 | 10,682 | 10,657 | 10,840 | 10,804 | 10,849 | 10,722 | 10,781 | 10,654 |
| Effingham | 2,497 | 2,519 | 2,594 | 2,622 | 2,701 | 2,727 | 2,771 | 2,772 | 2,819 | 2,818 |
| Evans | 369 | 364 | 366 | 362 | 365 | 361 | 359 | 352 | 351 | 344 |
| Liberty | 2,300 | 2,281 | 2,311 | 2,299 | 2,332 | 2,319 | 2,322 | 2,289 | 2,296 | 2,263 |
| Screven | 491 | 484 | 487 | 482 | 486 | 480 | 478 | 469 | 467 | 458 |
| **Total** | **21,260** | **21,216** | **21,622** | **21,642** | **22,084** | **22,083** | **22,241** | **22,051** | **22,237** | **22,041** |

**Appendix Table 7: Population Forecast for GSGR Counties Including Population From Jobs 2014-2023**

| County | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|---|---|---|---|
| Bryan | 33,664 | 34,792 | 35,839 | 36,999 | 38,059 | 39,627 | 45,043 | 46,974 | 48,218 | 49,739 |
| Bulloch | 72,651 | 73,116 | 74,642 | 75,991 | 77,242 | 79,608 | 79,922 | 80,671 | 83,038 | 84,327 |
| Candler | 10,865 | 10,873 | 10,849 | 10,706 | 10,827 | 10,803 | 11,022 | 10,947 | 10,962 | 11,059 |
| Chatham | 282,201 | 285,959 | 288,615 | 289,309 | 289,166 | 289,430 | 295,089 | 295,690 | 301,025 | 303,655 |
| Effingham | 55,410 | 57,076 | 58,699 | 60,086 | 62,228 | 64,296 | 65,169 | 66,764 | 69,034 | 71,541 |
| Evans | 10,811 | 10,690 | 10,648 | 10,741 | 10,702 | 10,654 | 10,792 | 10,697 | 10,659 | 10,754 |
| Liberty | 64,091 | 61,611 | 61,473 | 61,619 | 60,606 | 61,435 | 65,317 | 66,800 | 67,919 | 69,210 |
| Screven | 14,002 | 14,059 | 14,003 | 13,956 | 13,960 | 13,966 | 14,077 | 14,062 | 13,970 | 14,174 |
| **Total** | **543,695** | **548,176** | **554,768** | **559,407** | **562,790** | **569,819** | **586,431** | **592,605** | **604,825** | **614,459** |

**Appendix Table 8: Population Forecast for GSGR Counties Including Population From Jobs 2024-2033**

| County | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 |
|---|---|---|---|---|---|---|---|---|---|---|
| Bryan | 50,696 | 53,535 | 55,607 | 57,874 | 60,614 | 62,427 | 64,231 | 66,029 | 67,821 | 69,610 |
| Bulloch | 85,704 | 88,823 | 90,619 | 92,705 | 95,503 | 96,813 | 98,102 | 99,379 | 100,643 | 101,898 |
| Candler | 11,049 | 11,299 | 11,376 | 11,487 | 11,682 | 11,692 | 11,698 | 11,704 | 11,707 | 11,709 |
| Chatham | 310,132 | 319,915 | 324,892 | 330,877 | 339,364 | 342,533 | 345,623 | 348,669 | 351,663 | 354,626 |
| Effingham | 73,241 | 76,620 | 78,880 | 81,405 | 84,575 | 86,440 | 88,289 | 90,130 | 91,960 | 93,784 |
| Evans | 10,829 | 11,071 | 11,144 | 11,249 | 11,437 | 11,443 | 11,447 | 11,449 | 11,449 | 11,447 |
| Liberty | 67,462 | 69,397 | 70,284 | 71,385 | 73,021 | 73,509 | 73,979 | 74,439 | 74,887 | 75,329 |
| Screven | 14,403 | 14,727 | 14,826 | 14,968 | 15,220 | 15,231 | 15,238 | 15,243 | 15,245 | 15,244 |
| **Total** | **623,516** | **645,387** | **657,628** | **671,950** | **691,416** | **700,088** | **708,607** | **717,042** | **725,375** | **733,647** |

**Appendix Table 9: Population Forecast of 0-14 Children for GSGR Counties Including Population From Jobs 2014-2023**

| County | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|---|---|---|---|
| Bryan | 6,780 | 6,937 | 7,099 | 7,252 | 7,417 | 7,657 | 8,788 | 9,058 | 9,206 | 9,359 |
| Bulloch | 14,632 | 14,578 | 14,786 | 14,894 | 15,053 | 15,383 | 15,594 | 15,555 | 15,854 | 15,868 |
| Candler | 2,188 | 2,168 | 2,149 | 2,098 | 2,110 | 2,087 | 2,151 | 2,111 | 2,093 | 2,081 |
| Chatham | 56,837 | 57,016 | 57,171 | 56,703 | 56,353 | 55,928 | 57,576 | 57,015 | 57,473 | 57,139 |
| Effingham | 11,160 | 11,380 | 11,627 | 11,777 | 12,127 | 12,424 | 12,715 | 12,874 | 13,180 | 13,462 |
| Evans | 2,177 | 2,131 | 2,109 | 2,105 | 2,086 | 2,059 | 2,106 | 2,063 | 2,035 | 2,024 |
| Liberty | 12,908 | 12,284 | 12,177 | 12,077 | 11,811 | 11,871 | 12,744 | 12,880 | 12,967 | 13,023 |
| Screven | 2,820 | 2,803 | 2,774 | 2,735 | 2,721 | 2,699 | 2,747 | 2,711 | 2,667 | 2,667 |
| **Total** | **109,502** | **109,297** | **109,892** | **109,641** | **109,678** | **110,108** | **114,421** | **114,267** | **115,475** | **115,623** |

**Appendix Table 10: Population Forecast of 0-14 Children for GSGR Counties Including Population From Jobs 2024-2033**

| County | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 |
|---|---|---|---|---|---|---|---|---|---|---|
| Bryan | 9,394 | 9,699 | 10,014 | 10,335 | 10,584 | 10,766 | 10,935 | 11,101 | 11,274 | 11,453 |
| Bulloch | 15,881 | 16,092 | 16,320 | 16,556 | 16,677 | 16,696 | 16,702 | 16,708 | 16,730 | 16,765 |
| Candler | 2,047 | 2,047 | 2,049 | 2,051 | 2,040 | 2,016 | 1,992 | 1,968 | 1,946 | 1,926 |
| Chatham | 57,466 | 57,958 | 58,511 | 59,090 | 59,260 | 59,073 | 58,843 | 58,618 | 58,459 | 58,346 |
| Effingham | 13,571 | 13,881 | 14,206 | 14,538 | 14,769 | 14,907 | 15,031 | 15,153 | 15,287 | 15,430 |
| Evans | 2,007 | 2,006 | 2,007 | 2,009 | 1,997 | 1,974 | 1,949 | 1,925 | 1,903 | 1,883 |
| Liberty | 12,500 | 12,573 | 12,658 | 12,748 | 12,751 | 12,677 | 12,595 | 12,515 | 12,449 | 12,394 |
| Screven | 2,669 | 2,668 | 2,670 | 2,673 | 2,658 | 2,627 | 2,594 | 2,563 | 2,534 | 2,508 |
| **Total** | **115,535** | **116,924** | **118,435** | **120,000** | **120,736** | **120,736** | **120,641** | **120,551** | **120,582** | **120,705** |

**Appendix Table 11: Population Forecast of 0-14 Children in Paid Care for GSGR Counties Including Population from Jobs 2014-2023**

| County | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|---|---|---|---|
| Bryan | 1,234 | 1,076 | 1,318 | 1,354 | 1,269 | 1,321 | 1,754 | 978 | 1,223 | 1,656 |
| Bulloch | 2,663 | 2,261 | 2,745 | 2,781 | 2,576 | 2,654 | 3,113 | 1,679 | 2,106 | 2,808 |
| Candler | 398 | 336 | 399 | 392 | 361 | 360 | 429 | 228 | 278 | 368 |
| Chatham | 10,343 | 8,841 | 10,613 | 10,589 | 9,645 | 9,651 | 11,493 | 6,155 | 7,634 | 10,111 |
| Effingham | 2,031 | 1,765 | 2,159 | 2,199 | 2,075 | 2,144 | 2,538 | 1,390 | 1,751 | 2,382 |
| Evans | 396 | 331 | 392 | 393 | 357 | 355 | 420 | 223 | 270 | 358 |
| Liberty | 2,349 | 1,905 | 2,261 | 2,255 | 2,021 | 2,049 | 2,544 | 1,390 | 1,723 | 2,305 |
| Screven | 513 | 435 | 515 | 511 | 466 | 466 | 548 | 293 | 354 | 472 |
| **Total** | **19,927** | **16,950** | **20,402** | **20,474** | **18,770** | **19,000** | **22,839** | **12,336** | **15,339** | **20,460** |

**Appendix Table 12: Population Forecast of 0-14 Children in Paid Care for GSGR Counties Including Population from Jobs 2024-2033**

| County | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 |
|---|---|---|---|---|---|---|---|---|---|---|
| Bryan | 1,729 | 1,862 | 2,036 | 2,182 | 2,296 | 2,284 | 2,299 | 2,292 | 2,331 | 2,344 |
| Bulloch | 2,922 | 3,089 | 3,319 | 3,495 | 3,617 | 3,542 | 3,512 | 3,450 | 3,459 | 3,432 |
| Candler | 377 | 393 | 417 | 433 | 442 | 428 | 419 | 406 | 402 | 394 |
| Chatham | 10,575 | 11,127 | 11,898 | 12,474 | 12,853 | 12,531 | 12,372 | 12,105 | 12,086 | 11,943 |
| Effingham | 2,497 | 2,665 | 2,889 | 3,069 | 3,203 | 3,162 | 3,160 | 3,129 | 3,160 | 3,158 |
| Evans | 369 | 385 | 408 | 424 | 433 | 419 | 410 | 397 | 393 | 386 |
| Liberty | 2,300 | 2,414 | 2,574 | 2,691 | 2,765 | 2,689 | 2,648 | 2,584 | 2,574 | 2,537 |
| Screven | 491 | 512 | 543 | 564 | 576 | 557 | 545 | 529 | 524 | 513 |
| **Total** | **21,260** | **22,447** | **24,084** | **25,332** | **26,185** | **25,612** | **25,365** | **24,892** | **24,929** | **24,707** |

## Appendix B: Childcare Usage Methodology

CBAER utilized U.S Census Current Population Survey (CPS) micro-data from Integrated Public Use Microdata Series (IPUMS) to draw paid-childcare data for the state of Georgia from years 2010-2023. IPUMS provides a data explorer tool that allows users to filter data by criteria. In this case the relevant variable in the database was KDCNEED, which is a variable ranging from 0-2 describing whether the respondents' children under the age of 15 were in paid childcare, with a 2 denoting that the child is in paid childcare.[92] From there it is possible to further break the data into sets with multiple criteria. For the purposes of this analysis CBAER further filtered the data by child age (0-4,5-9,10-14). Then forecasting Georgia's total population for the years 2024-2033 for each group by using the historical data from 2018-2023. CBAER adjusts the years 2020 and 2021 in historical data with a forecast utilizing the years 2010-2019 to avoid misestimation from Covid years' outliers. After the forecast the research team then derived paid childcare participation rates for each group for each year from 2010-2033 and multiplied that by earlier population estimates. This yields the future population of children in paid childcare for each cohort.

[92]Community for Economic Development. (2022). *The Economic Role of Paid Child Care in the U.S. A Report Series — Part 4: Child Care Data in the Current Population Survey, A Primer*. Community for Economic

## Appendix C: Childcare Costs

The Georgia Child Care Market Rate Survey is conducted yearly and reports averages for three different types of counties, urban, suburban and rural and then further breaks down those averages into home-based and center-based care, and then by age ranges from 0-1, 2-3,3-5 and 5+.[93] The Greater Savannah Georgia Region currently only contains two types of counties, suburban and rural. The suburban counties are: Bryan, Bulloch, Chatham, Effingham, and Liberty, while the rural counties are Candler, Evans and Screven.[94] CBAER assigned each county in the Greater Savannah Georgia Region with its appropriate weekly cost by type of county according to the Georgia Child Care Market Rate Survey. Then CBAER created a weighted average for cost that took into account the available childcare slots by both childcare providers and county. This weighted average is presented as the weekly rates in the Childcare Costs and Childcare Wages section of the report in Table 14. To calculate the percentage childcare costs would be of median household income, CBAER first calculated the average yearly cost of childcare by multiplying the found weekly cost by 52, then dividing that by the yearly median household income for each county from the American Community Survey 5-Year Tables. This yielded the cost of childcare as a percentage for each county and age group. Then, the research team weighed each county by the number of childcare slots to then yield the average cost of childcare as a percentage of household income. An alternative methodology was explored that utilized estimated rates by county from the National Database for Childcare Prices, but the results were found to be similar. Therefore, CBAER chose data derived from the Georgia Child Care Market Rate Survey to represent the region because of the closer proximity of the survey. To update the market rates from 2023 to 2025, CBAER used price data collected by the CCR&R of Southeast Georgia from DECAL's public registry of providers. The public registry data totaled over 400 observations and spanned all GSGR counties. The average childcare cost of the GSGR rose 17.8 percent from 2023 to 2025. CBAER took this percentage and applied it to 2023 Market Rate Survey data to update the market rates.

[93] Georgia Department of Early Care and Learning. (2023). *Georgia October 2023 Child Care Market Rate Administrative Data*. Georgia Department of Early Care and Learning

[94] Care Solutions, Inc. (2022). *Georgia Child Care Market Rate Survey 2021*. Georgia Department of Early Care and Learning.

## Appendix D: Childcare Slots Alternative Data Set

CBAER is not the only agency to analyze child-care supply by measuring licensed slots. A 2024 report by the Low-Income Investment Fund (LIIF) also provides a database constructed with data from DECAL. In order to verify the integrity of both data sets and discern which was most appropriate, CBAER also compiled the slots by county utilizing data published from the Low-Income Investment Fund. A comparison of totals for the Greater Savannah Georgia Region and its composite counties between the public registry contemporary source and LIIF data is presented in Table 13 below

**Appendix Table 13: GSGR Counties' Slots by Dataset**

| County | Georgia Public Registry | Low-Income Investment Fund |
|---|---|---|
| Bryan | 1,359 | 1,246 |
| Bulloch | 1,988 | 2,021 |
| Candler | 176 | 200 |
| Chatham | 14,532 | 13,168 |
| Effingham | 3,076 | 2,927 |
| Evans | 129 | 129 |
| Liberty | 2,740 | 1,913 |
| Screven | 437 | 416 |
| **Total** | **24,437** | **22,020** |

Both data sets yield similar results. For the grand total, the Georgia Registry data estimates that there are 2,417 more slots available in the region than the Low-Income Investment Fund estimates. This translates to the total estimate from public registry contemporary data being 11 percent higher than the LIIF. There are multiple explanations for this discrepancy. First is that the State of Georgia does periodically review the facilities of childcare providers. This could mean that some providers have expanded their buildings' capacities. Also, the public registry data is at least one year more recent than LIIF data. This could be due to an increase in regional providers. Due to the public registry data being more contemporary, and containing extra information, such as operating hours, CBAER has elected to use the public registry data to analyze slots for the region.