The Child Care Landscape in Onondaga County:

A 2025 Supply & Demand Analysis

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Introduction

High-quality child care and early learning programs are proven to significantly improve a child's opportunities for the future. Access to quality child care during the crucial years from birth to age five helps build the foundational cognitive and social skills necessary for success in school, personal health, career, and life.[1,2] A large body of research suggests that high-quality early child care leads to greater school readiness, grade retention, academic achievement, high school completion, family stability, employment, higher income, home ownership, reduced health care expenses, and less crime, among other outcomes.[3,4,5,6]

Beyond investing in child development and improving the lifelong success of each individual child, access to quality child care has significant economic effects.[7] Affordable and accessible child care enables more families to work or pursue higher education and training, improving job stability and earnings and, consequently, boosting the economy.[8]

While the individual, social, and economic benefits of a strong child care infrastructure are known, the system is still undervalued and underfunded, resulting in poor outcomes. The Council for a Strong America reported that New York State loses $9.8 billion every year because child care struggles lead to productivity problems for employers, forgone earnings as parents are driven out of the workforce, and lower state/local tax revenue.[9]

Investing in high-quality child care is good for economic stability, children, families, and our communities. However, the child care model as it currently operates is unable to meet the demands of our society. Despite the positive externalities associated with healthy early childhood development, the child care model is financed in large part by individuals paying for care out of pocket. [10] Public funding for child care is extremely minimal when compared to the funding allotted to

[1] Heckman, J. J. (2011). The economics of inequality: The value of early childhood education. *American Educator*, *35*(1), 31.
[2] Heckman, J., Pinto, R., & Savelyev, P. (2013). Understanding the mechanisms through which an influential early childhood program boosted adult outcomes. *American economic review*, *103*(6), 2052-2086.
[3] McCoy, D. C., Yoshikawa, H., Ziol-Guest, K. M., Duncan, G. J., Schindler, H. S., Magnuson, K., ... & Shonkoff, J. P. (2017). Impacts of early childhood education on medium-and long-term educational outcomes. *Educational researcher*, *46*(8), 474-487.
[4] Currie, J., & Almond, D. (2011). Human capital development before age five. In *Handbook of labor economics* (Vol. 4, pp. 1315-1486). Elsevier.
[5] Heckman (2011)
[6] García, J. L., Heckman, J. J., & Ziff, A. L. (2019). Early childhood education and crime. *Infant mental health journal*, *40*(1), 141-151.
[7] Heckman, J. J. (2012). Invest in early childhood development: Reduce deficits, strengthen the economy. *The Heckman Equation*, *7*(1-2), 1-2.
[8] Morrissey, T. W. (2017). Child care and parent labor force participation: a review of the research literature. *Review of Economics of the Household*, *15*(1), 1-24.
[9] Bishop, S., Fishman, N., Garrett, T., Elkin, J., Ford, B., Galloway, M., & Belfield, C. R. (2023). $122 Billion: The growing, annual cost of the infant-toddler child care crisis. *Council for a Strong America, Feb*.
[10] US Department of the Treasury. (2021). The economics of child care supply in the United States.

school-aged children.[11,12] This system of financing and underfunding has resulted in child care providers earning well below the true cost of care, harming the quality of care and leading to high turnover rates.[13] In New York State, 50% of early educator households participate in one or more public safety net programs, which costs $535 million annually.[14] Additionally, in New York State, the early childhood educator workforce is 5.6 times more likely to live in poverty than elementary and middle school teachers.[15] The inability to recruit and retain child care educators because of poor compensation reduces the number of child care slots available for parents, perpetuating the cycle of a lack of affordable and available child care and low wages for child care providers.

The child care landscape has changed dramatically at the local, state, and federal levels in the past five years. In response to the impacts of the COVID-19 pandemic, the American Rescue Plan Act of 2021 provided critical assistance and funding to families and to the child care industry when it was on the brink of collapse.[16] New York State also prioritized funding increases to the child care system in the last few years.[17] However, while helpful, these temporary and often one-time investments remain insufficient to finance the system at the level needed. Onondaga County specifically has expanded eligibility criteria for child care assistance, increasing the number of families that could receive monetary support for child care. Yet, many families are still unable to afford child care or make use of the government assistance because they cannot find programs that meet their needs and hours.[18] The child care capacity crisis remains, with a high turnover rate and workforce shortages. Understanding the child care landscape in Onondaga County is a crucial step toward identifying the investment needs for equitable access to affordable, high-quality child care for everyone.

In 2022, the Early Childhood Alliance (ECA) Onondaga, Child Care Solutions, and the Onondaga County Department of Social Services - Economic Security (DSS-ES) commissioned Syracuse University's Maxwell School X Lab to conduct a comprehensive child care landscape analysis to create a community baseline of supply and demand, analyzing the impacts of the

[11] "2023 Child Care Affordability," Child Care Aware of America, accessed July 21, 2024, https://www.childcareaware.org/thechildcarestandstill/#PriceofCare.
[12] US Department of the Treasury. (2021).
[13] Khattar, R., & Coffey, M. (2023). The child care sector is still struggling to hire workers. *Center for American Progress. Available at: https://www. americanprogress. org/article/the-child-care-sector-is-still-struggling-to-hire-workers*.
[14] McLean et. al (2024)
[15] McLean, C., Austin, L.J.E., Powell, A., Jaggi, S., Kim, Y., Knight, J., Muñoz, S., & Schlieber, M. (2024). Early Childhood Workforce Index – 2024. Center for the Study of Child Care Employment, University of California, Berkeley. https://cscce.berkeley.edu/workforce-index-2024/.
[16] King, C., Banghart, P., Hackett, S., Guerra, G., & Appel, S. (2024). Future directions for child care stabilization: Insights from state and territory uses of COVID-19 relief funds. Child Trends. DOI: 10.56417/1169b4422y
[17] NYS Office of Children and Family Services (2024) (Child Care Availability Task Force | Division of Child Care Services | OCFS)
[18] NYS Office of Children and Family Services (2024)

COVID-19 pandemic in particular. This report provides an update to the 2022 analysis, using the same supply and demand framework to evaluate early child care and education in Onondaga County and highlighting changes in availability and accessibility at the local level over the past three years.[19]

This report compares 1) the supply of child care, which is the capacity of licensed and registered child care providers, universal pre-K slots, and legally exempt subsidized care, and 2) demand, which is the number of children living in households with all parents in the workforce, to understand the supply gap of child care in Onondaga County and compare it across the years. However, it is important to note that our supply data does not count unlicensed, trusted child care alternatives such as family, friends, neighbors, nannies, or au pairs. Additionally, our estimate of supply is based on the capacity of providers, and not the number of children enrolled in child care. Licensed capacity reflects the maximum number of seats allowable by law; it does not necessarily reflect if those seats are fillable. In many cases, inadequate staffing prevents providers from filling all the seats licensed to them.

The findings in this report provide an overview of the child care landscape in Onondaga County based on the most current available data. The aim is to use this knowledge to guide both current and future investments and work toward an equitable child care system that helps support all children in meeting their potential. To briefly summarize the results, the updated data suggests a continued gap in available child care in Onondaga County, with a consistent, significant discrepancy between child care demand and supply for infant and toddler care. At the same time, there has been a large increase in the number of pre-K slots in the county, with more school districts participating in universal pre-K (UPK) than before the pandemic. The following section provides an overview of key findings from the report.

[19] This framework is based on a methodology developed by IFF (a Community Development Financial Institution).

Key Findings

This analysis identified several important findings and trends in child care access in Onondaga County over the last few years. Key report findings include:

- **Onondaga County experienced an increase in the supply of licensed child care slots relative to the pandemic years**. The total supply increased by 36% between 2021 and 2024. However, current capacity numbers have not yet returned to pre-pandemic levels of child care supply.

- **In the aggregate, the child care supply gap has improved relative to the pandemic years.** Our previous report found that in 2021, Onondaga County had enough capacity for only 44% of children under age 5 who needed child care. In 2024, there was enough capacity to serve 60% of these children. While the overall trend is positive, it is evident that significant gaps in supply remain. The data clearly shows that there are still not enough available slots for the current number of children that are potentially demanding child care. The burden of child care must fall somewhere and, generally, it falls on a child's parents or family. Often, this means one parent having to leave the workforce to provide care or finding forms of care that may not provide the consistent and high-quality education needed for optimum early childhood development. Not only does this systemic barrier to workforce participation affect the economy, it also affects family well-being, with low-quality child care for children affecting their long-term outcomes and perpetuating harmful cycles.

- **Despite aggregate improvements, infants and toddlers (ages 0–2) remain especially underserved.** Disaggregating the supply gap by age demonstrates that the child care supply gap crisis in Onondaga County is concentrated within this age group. In 2021, there was enough capacity to meet the child care demands of 29% of infants and toddlers in the County. In 2024, this improved marginally, with enough child care slots for 35% of infants and toddlers with a demand for child care.

- **Expanded child care assistance eligibility has increased the number of children actively receiving child care assistance by 71% from 2021 to 2024.** Since 2022, Onondaga County has expanded child care assistance eligibility to families that earn up to 85% of the state's median income (SMI). This support covers the entirety of the cost of care for the lowest income families and a significant share of the cost for middle-

income families. The increased eligibility and slowly recovering rates of child care supply have led to an increase in the families receiving child care assistance in the past three years.

- **There has been a large increase in the number of pre-K slots in the community and more school districts are participating in UPK than before the pandemic.** Since 2021, six new school districts in the county have opened new UPK slots, contributing about 550 new slots in 2024 alone. UPK capacity has increased by 47% since 2021, a substantial increase in availability. While an improvement, it is important to note that though pre-school aged care is helpful for families, the timing and hours do not often work seamlessly with a traditional 9 am-5 pm work schedule. Parents still need to make choices and find alternative systems of care to ensure that they can remain in the workforce.

Results

Child Care Supply

At A Glance:

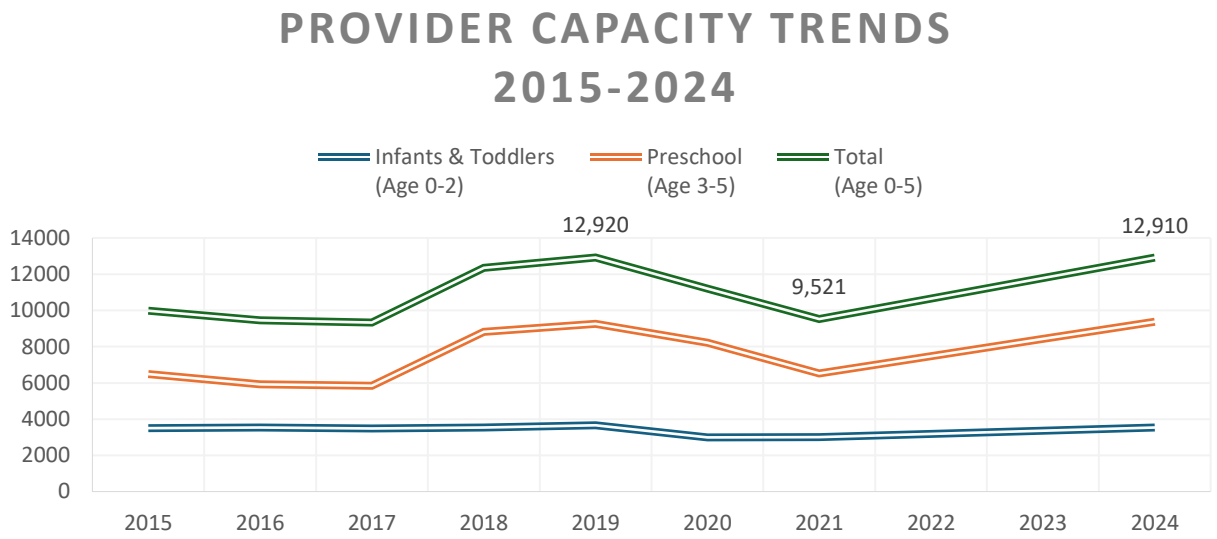
- In 2024, there were 403 formal and regulated early child care programs serving infants, toddlers, and preschoolers (aged zero to five), resulting in an estimated seating capacity supply of 12,910.
- In 2021, there were 398 formal and regulated early child care programs serving infants, toddlers, and preschoolers (aged zero to five), resulting in an estimated seating capacity supply of 9,521.
- There was a 36% increase in total capacity from 2021 to 2024.

To capture the supply of early childhood education programs, we combined datasets from Child Care Solutions, Onondaga County DSS-ES, the New York State Education Department, Onondaga County school districts, the Salvation Army, and PEACE, Inc. to create the most comprehensive listing of available providers.

This data includes estimates of formal, regulated, licensed, and unlicensed providers with seating capacity for child day care centers, family child care, group family day care, school age child care, UPK (half day and full day), legally exempt relative care, legally exempt non-relative care, and legally exempt group child care. However, it is important to restate that the data on licensed and regulated providers is limited; there is no way of tracking private forms of child care outside of child care assistance. Additionally, the supply capacity does not indicate the number of seats utilized throughout the year but does provide the maximum potential supply of early child care if every location were enrolled at full capacity. The supply data utilized therefore does not reflect the true level of child care being provided.

The data indicates that there are 403 formal and regulated early child care programs operating in 2024, with a total of 12,910 available slots. In 2021, there were a total of 9,521 available slots for child care. This amounts to an increase of approximately 36% in available child care slots over three years. In 2019, there were a total of 12,920 available slots for child care in the county, suggesting that the supply of child care has recovered to pre-pandemic levels. Chart 1 visually presents this data, showing the trends in available slots through the years.

Chart 1: Child Care Provider Capacity Trends, 2015-2024



Note: Provider capacity refers to the number of slots available for child care, not the number enrolled in licensed and unlicensed care. Additionally, trend lines were imputed for 2022 and 2023 due to lack of data during those years.

Tables 1 and 2 provide a breakdown of the available slots by provider type, children's age, and year. Day care centers were the largest providers of child care slots across all years. Table 3 outlines the number of licensed providers by year. Overall, there are 35 fewer child care providers than before the pandemic. The decrease has been most notable for in-home child care with a sole provider.

Table 1: Infant and Toddler (0-2 years) Child Care Provider Capacity by Year				
Category	**Provider Type**	**2019**	**2021**	**2024**
Licensed	Child Day Care Centers (DCC)	2,148	1,975	2,137
	Family Day Care (FDC)	378	334	314
	Group Family Day Care (GFDC)	456	404	464
	School Age Child Care (SACC)	0	0	0
	Total	***2,982***	***2,713***	***2,915***
Unlicensed	Legally Exempt Non-Relative Care	222	65	110
	Legally Exempt Relative Care	455	224	510
	Legally Exempt Group Child Care	0	0	0
	Total	***677***	***289***	***620***

Note: Provider capacity refers to the number of slots available for child care, not the number enrolled in licensed and unlicensed care

Table 2: Preschool (3-5 years) Child Care Provider Capacity by Year				
Category	**Provider Type**	**2019**	**2021**	**2024**
Licensed	Child Day Care Centers (DCC)	3,653	2,326	3,644
	Family Day Care (FDC)	746	659	625
	Group Family Day Care (GFDC)	908	802	918
	School Age Child Care (SACC)	22	22	54
	Universal Pre-K (Half Day)	1,466	895	566
	Universal Pre-K (Full Day)	1,689	1,449	2,884
	Total	***8,484***	***6,153***	***8,691***
Unlicensed	Legally Exempt Non-Relative Care	250	77	119
	Legally Exempt Relative Care	520	289	565
	Legally Exempt Group Child Care	7	0	0
	Total	***777***	***366***	***684***

Note: Provider capacity refers to the number of slots available for child care, not the number enrolled in licensed and unlicensed care.

Table 3: Licensed Providers by Year				
Category	**Provider Type**	**2019**	**2021**	**2024**
Licensed	Child Day Care Centers (DCC)	83	77	79
	Family Day Care (FDC)	189	167	157
	Group Family Day Care (GFDC)	114	101	116
	School Age Child Care (SACC)	52	53	51
	Total	***438***	***398***	***403***

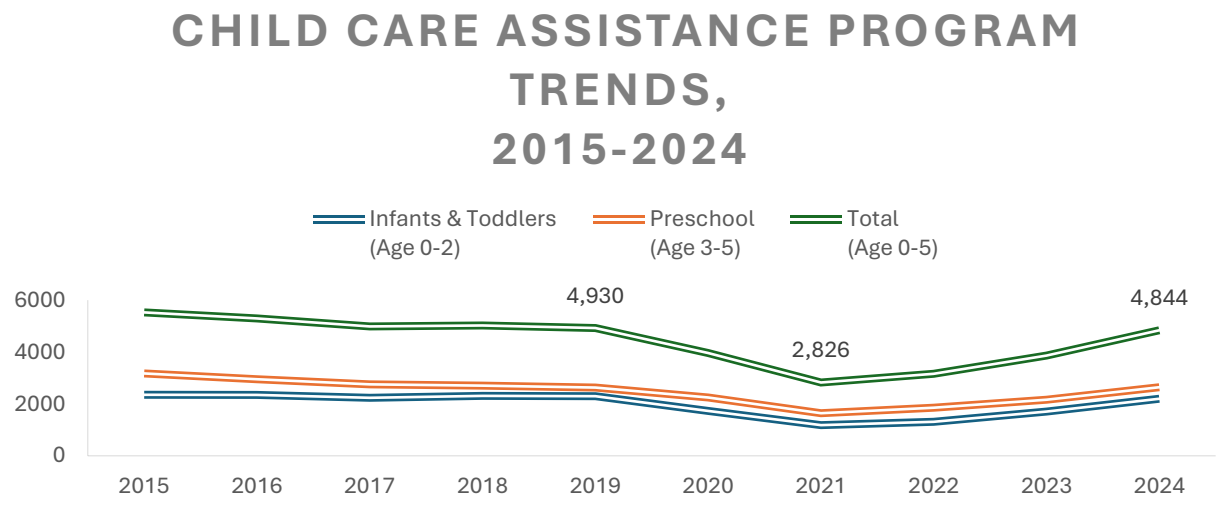
Subsidized Child Care

At A Glance:

- In 2024, Onondaga County DSS-ES provided 4,844 families with child care assistance. In 2021, 2,826 families received child care assistance.
- There was a 71% increase in the provision of child care assistance over the past three years.
- In 2024, the number of children enrolled in Early Head Start (EHS) was 272. There were 746 children enrolled in Head Start (HS).

Onondaga County DSS-ES supplied estimates of the total number of families receiving child care assistance. Chart 2 tracks the number of families receiving child care assistance from 2015 to 2025. The chart demonstrates that the provision of child care assistance remained relatively stable between 2015-2019. However, there was a steep decrease in the number of families receiving assistance once the pandemic began in 2020. In 2015, there were 5,528 families receiving assistance, dropping to 2,826 families in 2021. In 2024, the number of families receiving assistance increased to 4,844, which amounts to a 71% increase over the past three years.

Chart 2: Child Care Assistance Program Trends, 2015-2024



Note: Child care assistance program trends represent the number of payments to child care providers.

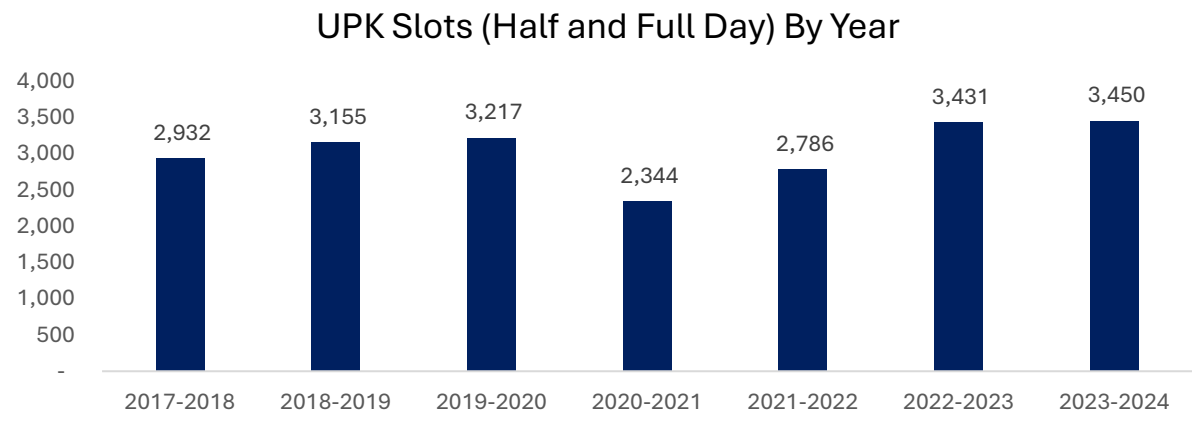
In addition to child care assistance, children from families whose income is below 200% Federal Poverty Level are eligible for the EHS and HS programs. EHS and HS programs are run by non-profit organizations, schools, and community action agencies. In Onondaga County, PEACE, Inc., and the Salvation Army are two of the largest agencies implementing the programs. Data from these two agencies' enrollment rates are shown in Table 4.

Table 4: EHS and HS Eligibility and Enrollment by Year

Ages	2020		2024	
	Child Care Eligibility	No. of Children Enrolled	Child Care Eligibility	No. of Children Enrolled
Early Head Start (EHS) [Age (0-2)]	3,905	302	3,821	272
Head Start (HS) [Age (3-5)]	4,387	829	4,250	746
Total	**8,292**	**1,131**	**8,071**	**1,018**

In Onondaga County, there are several school districts that provide UPK programs starting at age 3. The state allocates funding to school districts for UPK attendance but, historically, not all districts receive funding for UPK. Chart 3.1 shows the total number of UPK slots over the past few years. In 2024, the number of available UPK slots exceeded the pre-pandemic levels.

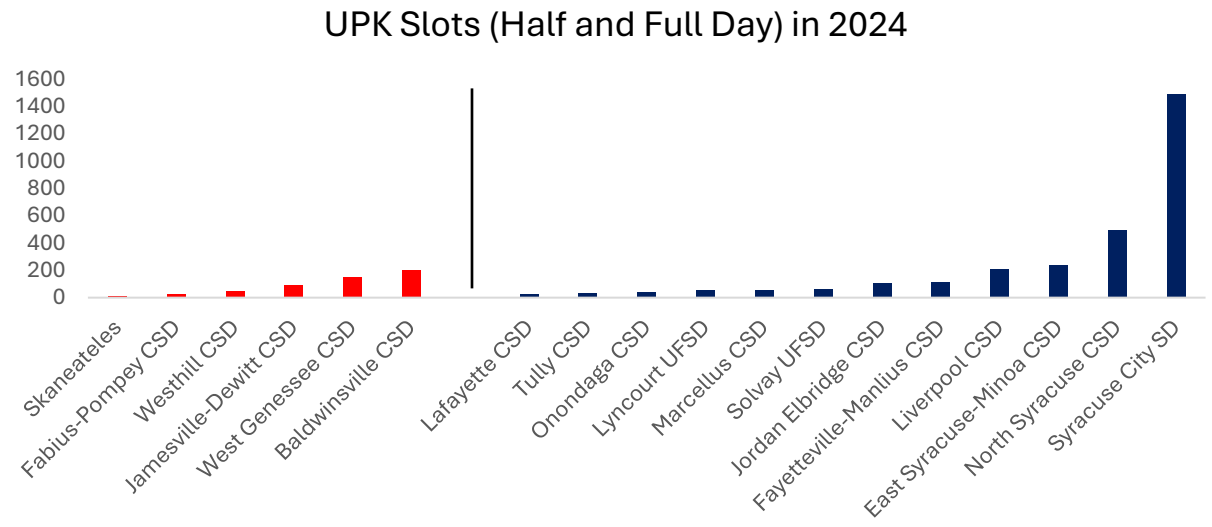
Chart 3.1: Universal Pre-Kindergarten Slots, 2017-2024



Note: UPK slots refer to the number of slots available for children, not the number of children enrolled in UPK.

Chart 3.2 shows the number of children attending UPK by school district in Onondaga County in 2024. The increase in UPK slots is associated with the expansion of already-existing programs and the addition of programs in Skaneateles, Fabius-Pompey CSD, Westhill CSD, Jamesville-Dewitt CSD, West Genesee CSD, and Baldwinsville CSD. The Syracuse City School District continues to be the district offering the largest number of children a UPK, but this is proportional to demand.

Chart 3.2: Universal Pre-Kindergarten Slots by School District, 2017-2024



Note: UPK slots refer to the number of slots available for children, not the number of children enrolled in UPK. School districts in red highlight the newest districts to add UPK slots since 2021.

Child Care Demand

At A Glance:

- The most recent American Community Survey (ACS) estimates indicate a total of 21,641 children that comprise the maximum potential demand for child care in Onondaga County.
- There are 12,620 children that live below 340% FPL whose families are eligible for child care assistance.

To estimate the demand side of the equation, we utilized data from the 2018-2023 ACS 5-year population estimates. In our analysis, demand is defined as the number of children aged zero to five who live in a two-parent home where both parents are in the labor force or a single-parent home where the single parent is participating in the labor force.

For purposes of calculating demand, we assume that a non-working parent is able to stay at home and care for their children, thus eliminating the need for child care services outside of the home. In 2022, the laws permitting access to child care assistance were adjusted in New York State. Onondaga County has expanded eligibility for child care assistance to families living below 85% SMI (approximately 340% FPL). To estimate the number of families eligible for and demanding child care assistance, we multiply the percentage of children living in households below 340% FPL by the overall demand for child care services.

One of the primary challenges in our demand estimation is the limited data on parental preference for child care. The number of parents who work from home with their children is unknown, as is how many children receive unsubsidized private forms of child care (i.e., from relatives, neighbors, friends, nannies, au-pairs, or other forms of child care that are not subject to government regulations). Similarly, we lack data on the location of demanded child care. For our analysis, we assume that a family's residential location is the place where they demand child care services. However, it may be that parents prefer child care services on the route to their workplace or close to their workplace to better respond to emergencies.

Onondaga County has a population of 30,953 children five and younger. After accounting for the employment status of parents and family composition, we estimate that there are a total of 21,641 children that comprise the maximum potential demand for child care in Onondaga County.

Table 5 shows the maximum potential demand for child care and the maximum number of families eligible for child care assistance in Onondaga County from the past few years. With the expansion of the eligibility criteria for child care assistance, 15% more families are eligible for support.

previous report, compared to the most recent updated ACS data. Total demand is relatively unchanged over the

Table 5: Total Child Care Demand and Assistance Eligibility by Year				
	ACS 2015-2019		ACS 2018-2023	
Ages	**Total Demand**	**Eligibility at 275% FPL**	**Total Demand**	**Eligibility at 340% FPL**
Infants and Toddlers [Age (0-2)]	10,346	5,186	10,617	6,084
Preschool [Age (3-5)]	11,148	5,765	11,024	6,536
Total	**21,494**	**10,951**	**21,641**	**12,620**

Child Care Supply Gap

At A Glance:

- In 2024, Onondaga County had enough child care capacity to serve 60% of the children that have a need for child care. This is a supply gap of 8,731 seats.
- In 2021, Onondaga County had enough capacity for only 44% of children under age 5 that had need for child care. This is a supply gap of 11,973 seats.

This section of the report focuses on the core of our analysis: the calculation of the child care supply gap in the county. *The supply gap is the number of available slots for child care subtracted from the maximum potential demand for child care*. Estimates are calculated for Onondaga County as a whole and at the census tract level. We also evaluate the gaps in provision of child care assistance by evaluating the difference between the maximum potential demand and eligibility for child care assistance with the provision of payments by Onondaga County DSS-ES for the county and at the zip code level.

Tables 6.1-6.4 break down the supply gap for child care for families in Onondaga County in 2019, 2021, and 2024. In 2021, there was a total child care supply gap of 56%. This means that 56% of the total number of families with a potential demand for child care were not able to find available and affordable child care that met their needs. In 2024, the supply gap improved substantially and reduced to 40%. This is on par with the supply gap in 2019 (pre-pandemic). Breaking it down by age group, the supply gap for infant and toddler aged child care is particularly wide. While UPK slots have helped improve the supply gap for pre-school aged children, families with very young children are still facing barriers and gaps in the provision of child care. The supply estimate for this comparison uses our most comprehensive supply measure – the number that includes formal and licensed provider slots, UPK slots, and subsidized legally exempt care. It does not include informal care such as nannies, au pairs, relatives, neighbors, or friends. The demand estimate is our maximum potential demand for child care assuming that parents need child care if they are both working.

As such, the supply shortages estimated in this scenario are an upper-bound estimate of shortages and can be refined and updated as more data become available over time.

Table 6.1: Supply Gap 2024				
Ages	**Max Potential Demand**	**Available Supply**	**Supply Gap**	**Supply Gap (%)**
Infants and Toddlers [Age (0-2)]	10,617	3,535	7,082	65%
Preschoolers [Age (3-5)]	11,024	9,375	1,649	15%
Total	**21,641**	**12,910**	**8,731**	**40%**

Table 6.2: Supply Gap 2021				
Ages	**Max Potential Demand**	**Available Supply**	**Supply Gap**	**Supply Gap (%)**
Infants and Toddlers [Age (0-2)]	10,346	3,002	7,344	71%
Preschoolers [Age (3-5)]	11,148	6,519	4,629	42%
Total	**21,494**	**9,521**	**11,973**	**56%**

Table 6.3: Supply Gap 2019				
Ages	**Max Potential Demand**	**Available Supply**	**Supply Gap**	**Supply Gap (%)**
Infants and Toddlers [Age (0-2)]	10,346	3,659	6,687	65%
Preschoolers [Age (3-5)]	11,148	9,261	1,887	17%
Total	**21,494**	**12,920**	**8,574**	**40%**

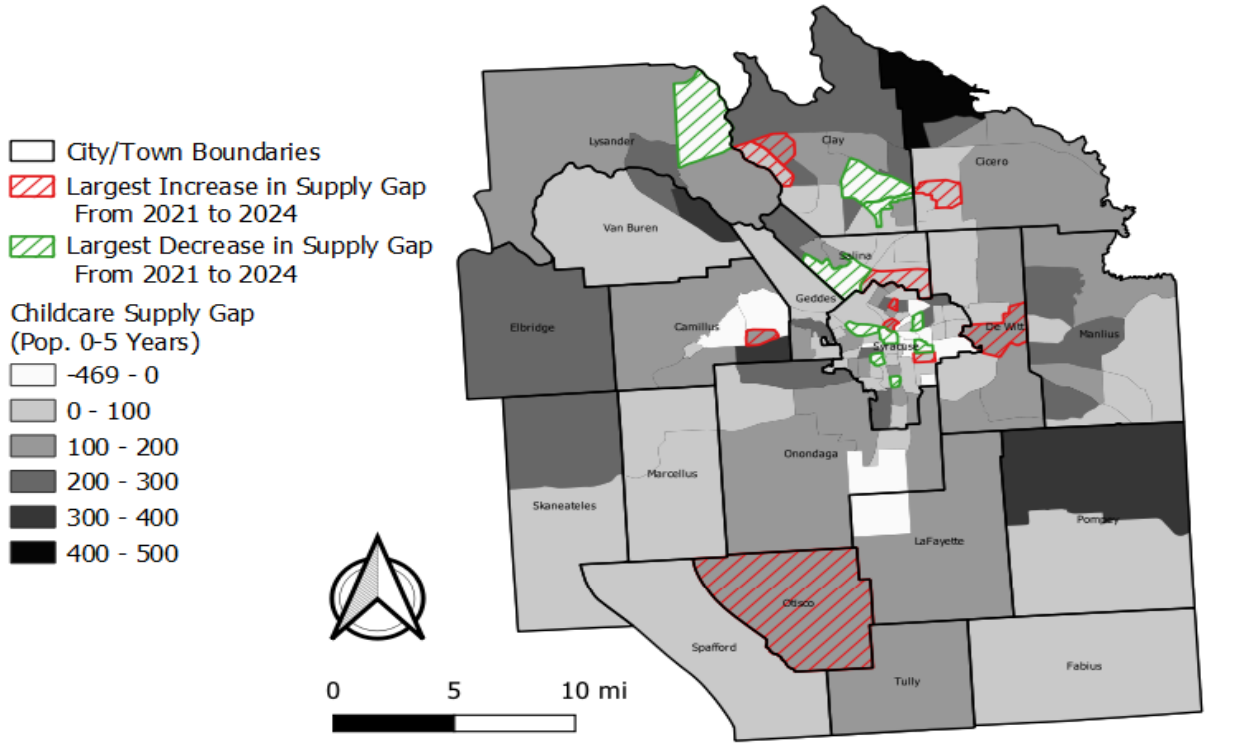
Table 6.4: Supply Gap % by Year			
Ages	**2019**	**2021**	**2024**
Infants and Toddlers [Age (0-2)]	65%	71%	65%
Preschoolers [Age (3-5)]	17%	42%	15%
Total	**40%**	**56%**	**40%**

In addition to the overall supply gap, it is helpful to identify the specific locations within the County that are especially underserved. This provides key insights for targeting programming and investment activity to address the unmet needs in underserved areas. For that reason, we assess the supply shortages at the census tract level.

Map 1 visually represents the 2024 supply gap for Onondaga County in grayscale. Darker areas have a higher supply gap, meaning there are very few child care slots available to meet demand. Green hashed areas represent the largest percent decrease in supply gap from 2021 to 2024 (an improvement in the availability of slots vs. demand), and red hashed areas represent the largest percent increase in the supply gap during the same year (a worsening of the difference between slots and demand).

Cities/towns with the largest decrease in supply gap (an improvement) include areas in parts of Syracuse, Clay, Salina, and Lysander. Cities/towns with the largest increase in supply gap (a worsening) include areas in parts of Syracuse, Clay, Otisco, DeWitt, Camillus, and Cicero.

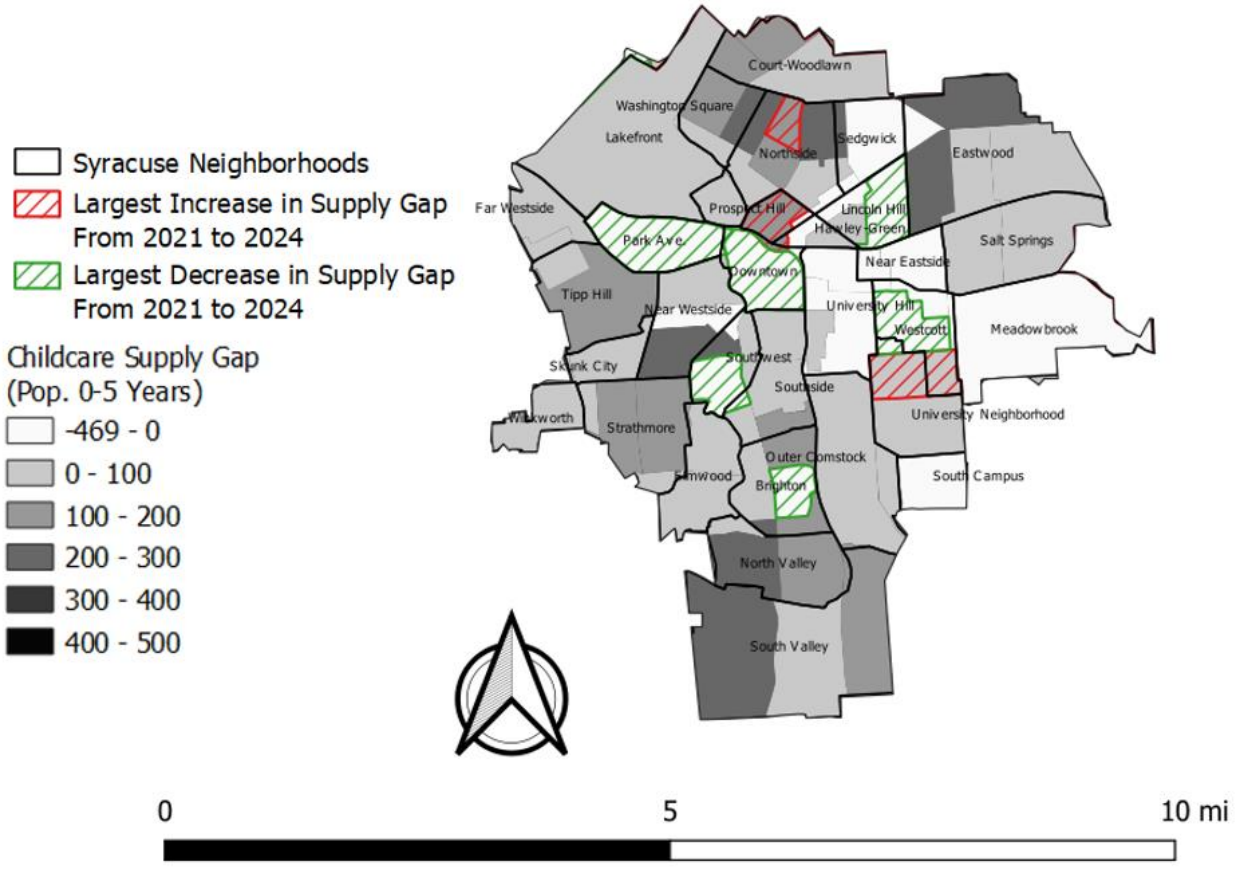
Map 1: Onondaga County Child Care Supply Gap by Census Tracts (2024)



Note: Supply gap is represented in grayscale. The supply gap was calculated as the difference between the supply and demand of child care in 2024. The red and green highlights show the highest percentage increases and decreases, respectively, in supply gaps between 2021 and 2024.

Map 2 visualizes the same data as Map 1 but focuses on the City of Syracuse. Syracuse neighborhoods with the largest percentage decrease in supply gap (improvement) include parts of Downtown, the Westcott/University Neighborhood, Lincoln Hill, Park Avenue, the Southwest/Southside, and Brighton. Syracuse neighborhoods with the largest percentage increase in supply gap (worsening) include parts of Westcott/ University Neighborhood, Prospect Hill, and the Northside

Map 2: Syracuse City Child Care Supply Gap by Census Tracts (2024)



Note: Supply gap is represented in greyscale. The supply gap was calculated as the difference between the supply and demand of child care in 2024. The red and green highlights show the highest percentage increases and decreases, respectively, in supply gaps between 2021 and 2024.

Child Care Assistance Program Gap

At A Glance:

- In 2024, there was a child care assistance gap of 7,776 slots in Onondaga County. At that time, 38% of the total number of families that were eligible for and had a potential demand for child care assistance received support.
- In 2021, there was a child care assistance gap of 8,686 slots in Onondaga County. Of the total number of families that were eligible for and had a potential demand for child care assistance, only 21% received support for child care.
- Under the expanded Child Care Assistance Program (CCAP), the child care assistance gap was reduced substantially.

In 2021, we estimated the child care assistance gap at the 275% FPL demand levels. In 2022, the laws permitting access to child care assistance were adjusted in New York State. Onondaga County now allows families living below 85% SMI to access CCAP. To account for the Census data only providing data on children by FPL levels, we estimate the child care assistance gap at the 340% FPL demand levels to match the 85% SMI calculation.

The experience of high- income parents differ significantly from lower income parents, highlighting the importance of looking at the gaps in child care assistance.

High-income parents who lack access to formal and regulated child care in their neighborhoods have resources to access unregulated providers such as nannies and au-pairs or commute or travel to separate locations to access child care. For low-income parents, a shortage of child care providers that are eligible for assistance in their neighborhood may present a greater challenge. Tables 7.1-7.4 summarize the overall supply gap in child care assistance in 2019, 2021, and 2024.

In 2021, there was a 79% gap in the child care assistance eligibility. There are many reasons why eligible parents might not apply for child care assistance, including the quality of child care available, parent preference, stigma, lack of awareness, or barriers to the application process. However, this large gap suggests that changes need to be made to improve the provision of supports to families eligible for child care assistance. In 2024, there was a substantial improvement with the CCAP expansion, with the child care assistance eligibility gap falling to 62%.

Table 7.1: Child Care Assistance Eligibility Gap 2024				
Ages	**Max Eligibility**	**Assistance Provided**	**Eligibility Gap**	**Eligibility Gap (%)**
Infants and Toddlers [Age (0-2)]	6,084	2,196	3,888	64%
Preschoolers [Age (3-5)]	6,536	2,648	3,888	59%
Total	**12,620**	**4,844**	**7,776**	**62%**

Table 7.2: Child Care Assistance Eligibility Gap 2021				
Ages	**Max Eligibility**	**Assistance Provided**	**Eligibility Gap**	**Eligibility Gap (%)**
Infants and Toddlers [Age (0-2)]	5,186	939	4,247	82%
Preschoolers [Age (3-5)]	5,765	1,326	4,439	77%
Total	**10,951**	**2,265**	**8,686**	**79%**

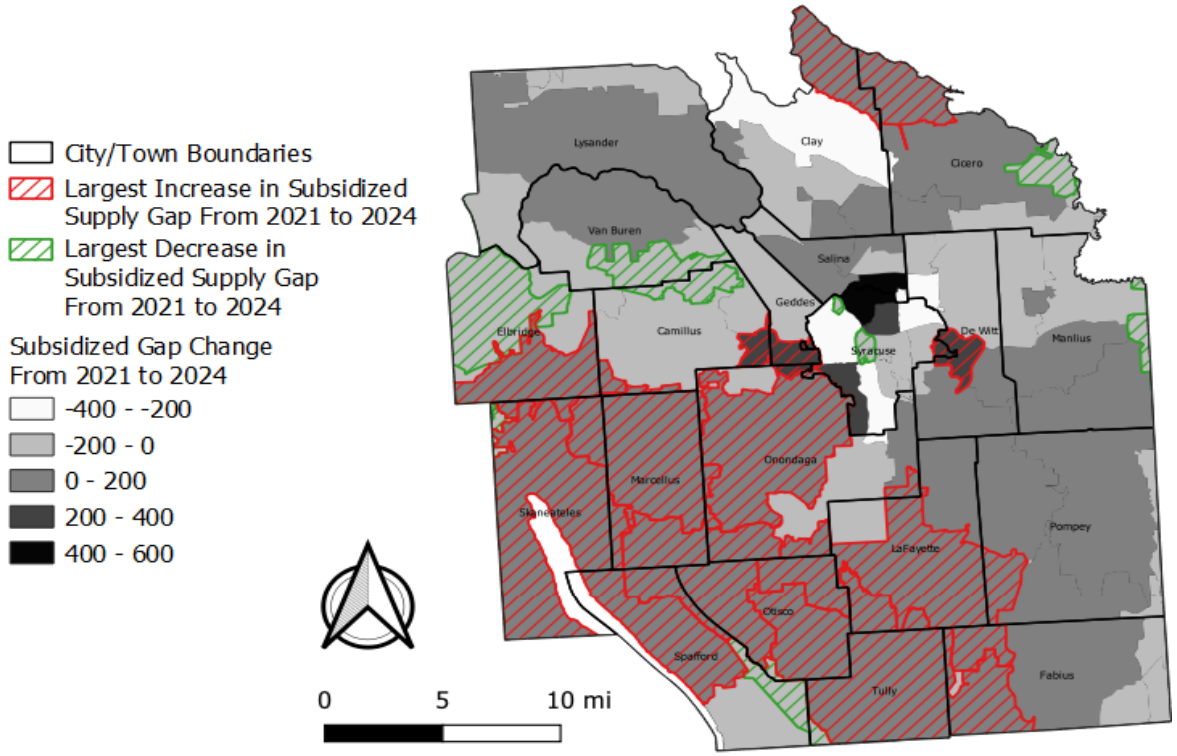
Table 7.3: Child Care Assistance Eligibility Gap 2019				
Ages	**Max Eligibility**	**Assistance Provided**	**Eligibility Gap**	**Eligibility Gap (%)**
Infants and Toddlers [Age (0-2)]	5,186	2,302	2,884	56%
Preschoolers [Age (3-5)]	5,765	2,628	3,137	54%
Total	**10,951**	**4,930**	**6,021**	**55%**

Table 7.4: Child Care Assistance Eligibility Gap % by Year			
Ages	**2019**	**2021**	**2024**
Infants and Toddlers [Age (0-2)]	56%	82%	64%
Preschoolers [Age (3-5)]	54%	77%	59%
Total	**55%**	**79%**	**62%**

Map 3 visually represents the child care assistance eligibility gap in 2024 in grayscale. Darker areas have a higher supply gap, meaning the number of eligible families was greater than the number of supports provided. Green hashed areas represent the largest percent decrease from 2021 to 2024 (an improvement in assistance provision relative to demand), and red hashed areas represent the largest percent increase during the same year (a worsening of the gap between provision of and eligibility for child care assistance).

Cities/towns with the largest percentage decrease in child care assistance gap (an improvement) include parts of the City of Syracuse, Cicero, Manlius, Van Buren/ Camillus, Elbridge, and Spafford/Otisco/ Tully. Cities and towns with the largest percentage increase in child care assistance gap (a worsening) include parts of DeWitt/ East Syracuse, Cicero/Clay, Geddes/Camillus, Onondaga, Marcellus, Skaneateles, Spafford, Otisco, Lafayette/Pompey, Tully/Fabius, and Elbridge.

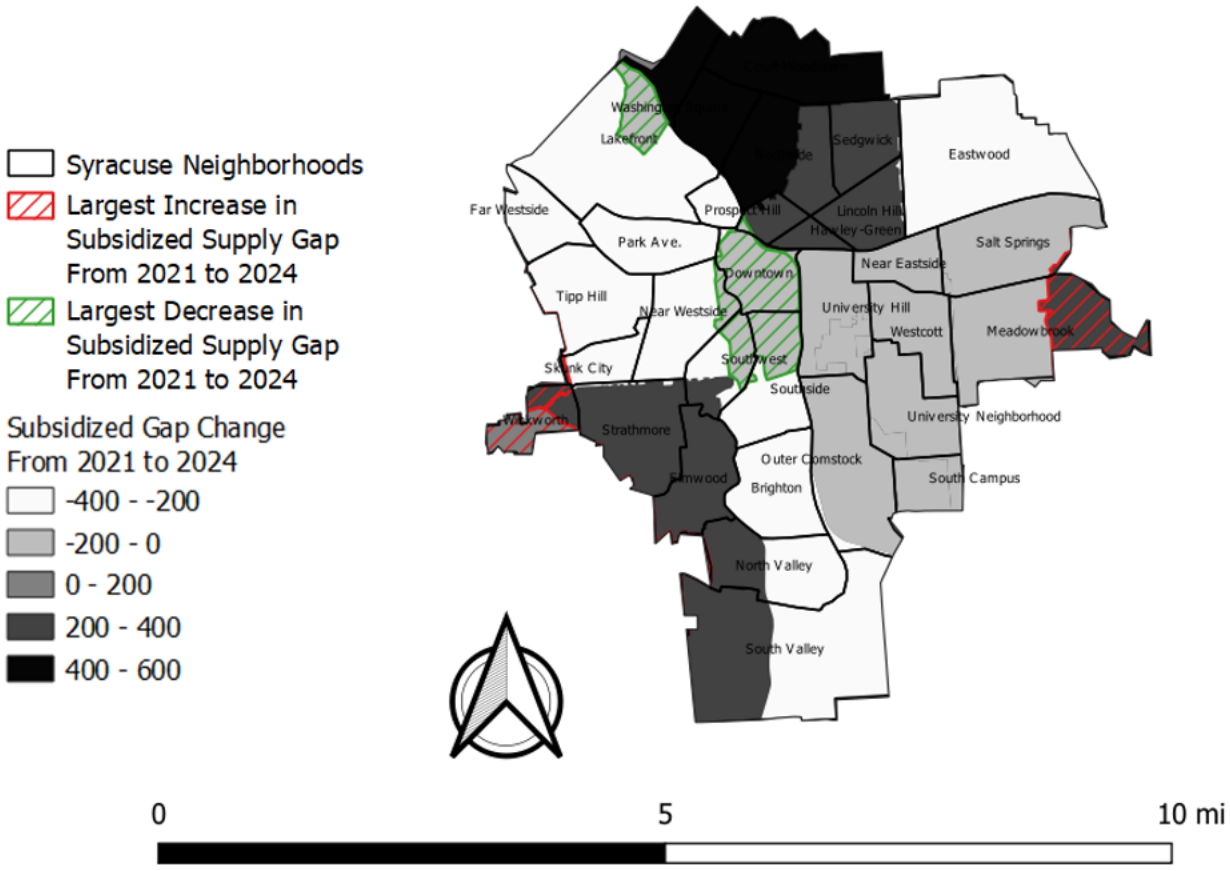
Map 3: Onondaga County Child Care Assistance by Zip Code (2024)



Note: Assistance gap change is represented in grayscale. The assistance gap change was calculated as the difference between the assistance provided and eligibility for child care assistance in 2024. The red and green highlights show the highest percentage increases and decreases, respectively, in child care assistance gaps between 2021 and 2024.

Map 4 visualizes the same data as Map 3 but focuses on the City of Syracuse. Syracuse neighborhoods with the largest percentage decrease in child care assistance gap (an improvement) include parts of Downtown, the Near the Westside, the Southwest, the Southside, and Washington Square. Syracuse neighborhoods with the largest percentage increase in child care assistance gap (a worsening) include Winkworth/Skunk City, and Meadowbrook/Salt Springs.

Map 4: Syracuse City Child Care Assistance by Zip Code (2024)



Note: Assistance gap change is represented in grayscale. The assistance gap change was calculated as the difference between the assistance provided and eligibility for child care assistance in 2024. The red and green highlights show the highest percentage increases and decreases, respectively, in child care assistance gaps between 2021 and 2024.

Conclusion

Investments in child care help build a better and stronger future for children, families, and our communities. The data in this report highlights that while Onondaga County has made significant progress in increasing access post-pandemic, the supply of child care still does not meet the current potential demand. This gap is especially stark for infants and toddlers. The impact of a child care system in which supply does not come close to meeting demand is felt by many. Parents in working families are thus faced with two related issues: 1) a lack of providers and provider capacity is making it difficult to find child care; and 2) child care remains prohibitively expensive for parents. In response to these challenges, families are forced to make decisions such as staying home or providing lesser quality care for their children, affecting their children's long-term outcomes and their own earning potential.

COVID-19 affected the child care landscape of Onondaga County. Child care providers were already unable to meet demand in the years before the pandemic, but 2020 saw a large decrease in child care capacity. Recovery has been slow, but capacity has now almost achieved parity with pre-COVID levels.

The child care policy environment across federal, state, and local governmental levels is uncertain. Pandemic era investments such as the American Recovery Act have ended. Increased access to UPK is helping reduce the supply gap for pre-school aged children, but this does not address the remaining prevalent supply gap issues for infants and toddlers. The data continues to suggest that the local child care landscape requires robust, systematic investment.

We maintain our recommendation for continued investment in adequate resources to ensure that all families have access to affordable high-quality child care. From building up new care providers to building out the existing capacity of licensed care facilities, the number of potential child care slots must be increased to significantly reduce the County's supply gap. There will need to be continued advocacy for increased state and federal investment in child care, and we support efforts to make high quality child care more universally available in New York State. Until families can afford and access the high-quality child care they need, we will continue to face systemic barriers to caring for the children in our community.