



INSTITUTE *for* CHILD SUCCESS

**SURVEY REPORT:
INITIAL ECONOMIC
IMPACT OF COVID-19
ON SOUTH CAROLINA'S
CHILD CARE SECTOR**

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Megan Carolan

Director of Policy Research,
Institute for Child Success

Child Care Landscape, Pre-COVID

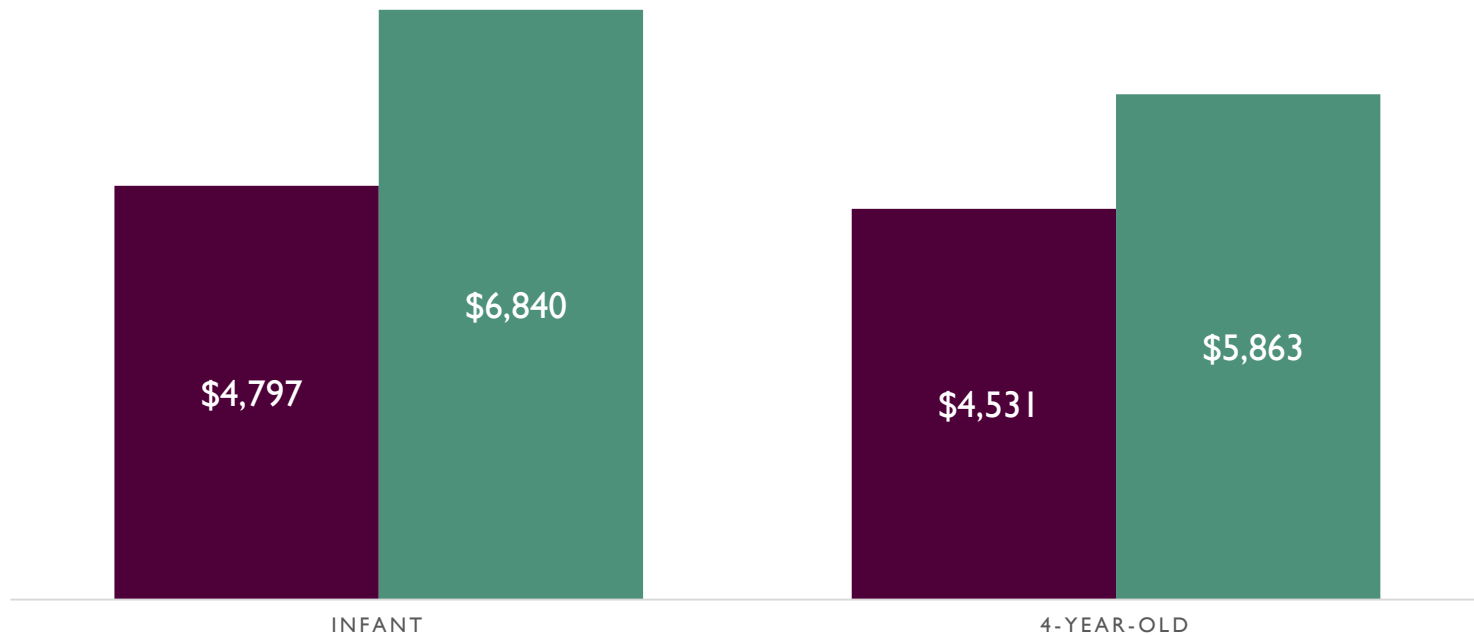
A Fragile Sector

- Access: Demand Exceed Availability
 - Young children potentially needing care: 223,138
 - Child care spaces available: 189,463
- Workforce issues: Low compensation, unclear professional pathways, high turnover
 - 6,700 providers employed in SC (does not include public school 4K)
 - Average salary \$21,030 (for context, this would be below the poverty level for a family of 3)

High Parent Costs, Yet Thin Provider Margins

AVERAGE CARE COSTS*

■ Family child care home ■ Center-based care



COVID Forces a National Crisis in Child Care

50% would not survive a **closure of 2 weeks**

• National (NAEYC) (3/12-25)

Of those open, 85% are at **50% or less of capacity**

• National NAEYC (4/2-10)

1/3 could **close permanently** without immediate financial relief

• North Carolina (4/9)

Many unable to make next **mortgage/rent payment** for home and/or business.

• Nebraska (4/6)

72% of closed providers were **no longer collecting tuition**

• Louisiana (3/16-32)

Impacts on Child Care in South Carolina

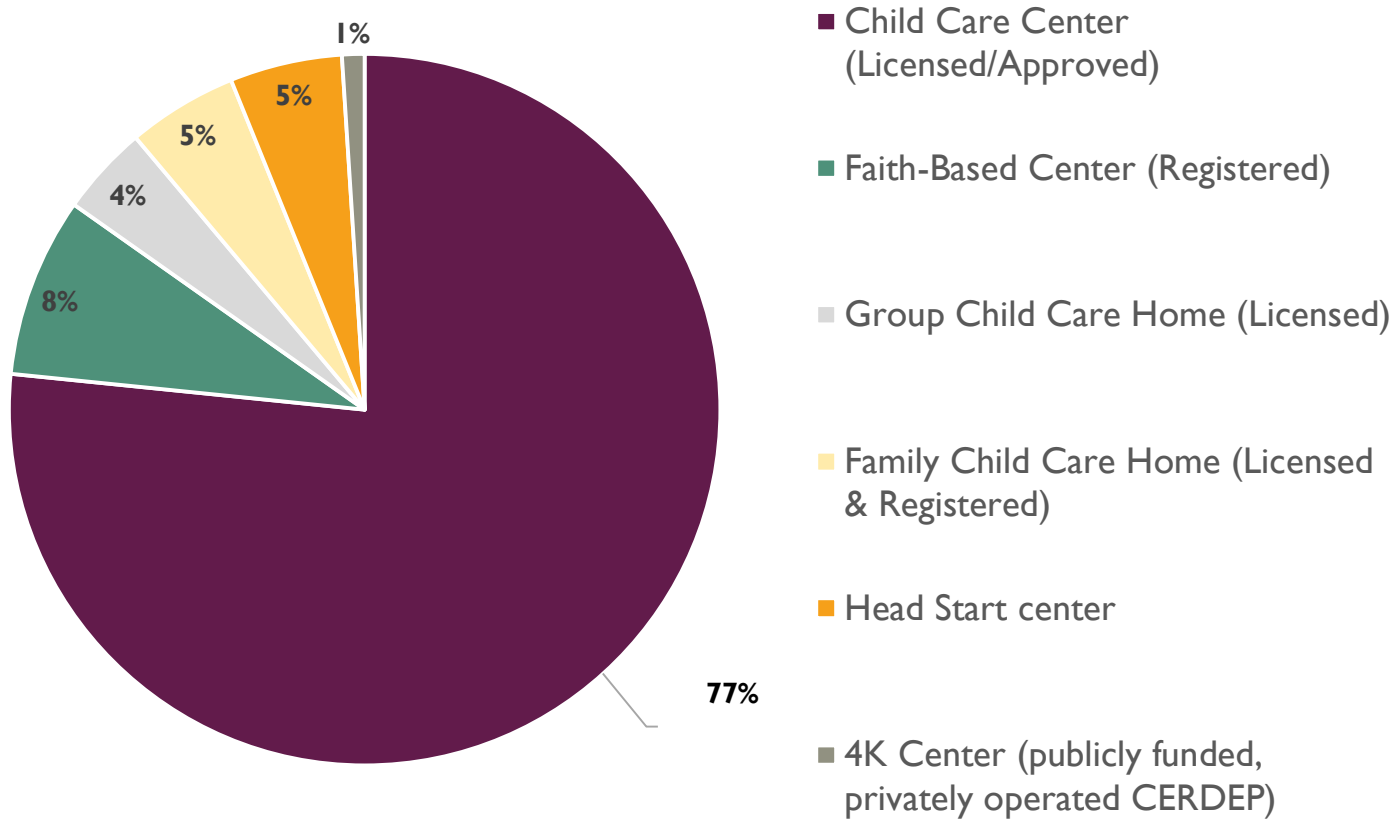


Survey Participants

- Surveyed between April 17 – 27
- 98 respondents across 22 counties
 - 54 respondents who indicated the use of SC Child Care Vouchers

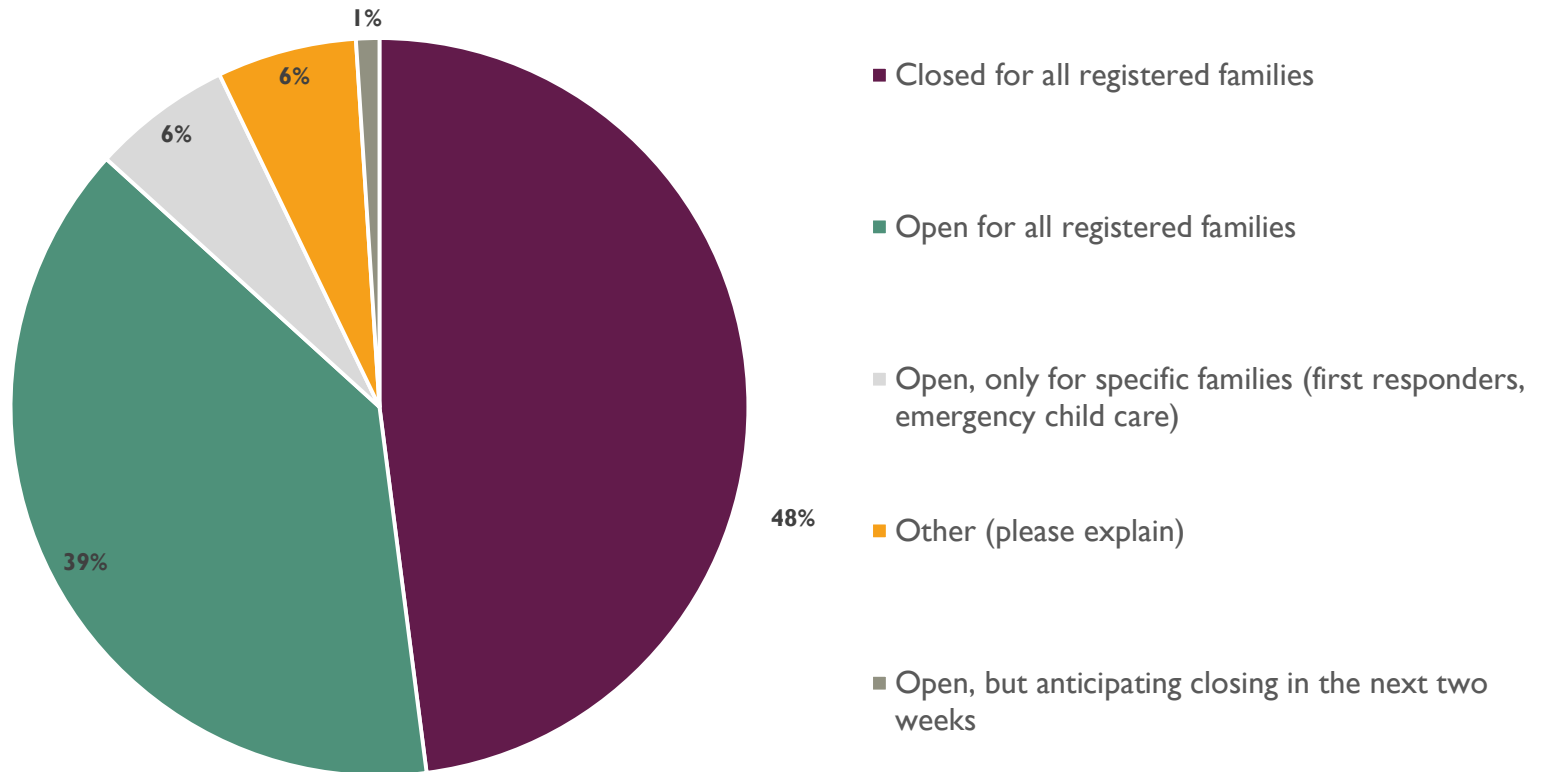
County	Percent	County	Percent
Spartanburg	17%	Laurens	3%
Richland	11%	Aiken	2%
York	9%	Dorchester	2%
Horry	8%	Newberry	2%
Charleston	7%	Allendale	1%
Georgetown	6%	Clarendon	1%
Greenville	6%	Jasper	1%
Kershaw	5%	Oconee	1%
Lexington	5%	Orangeburg	1%
Berkeley	4%	Union	1%
Florence	4%	Williamsburg	1%

Provider Type of Respondents



Operating Status

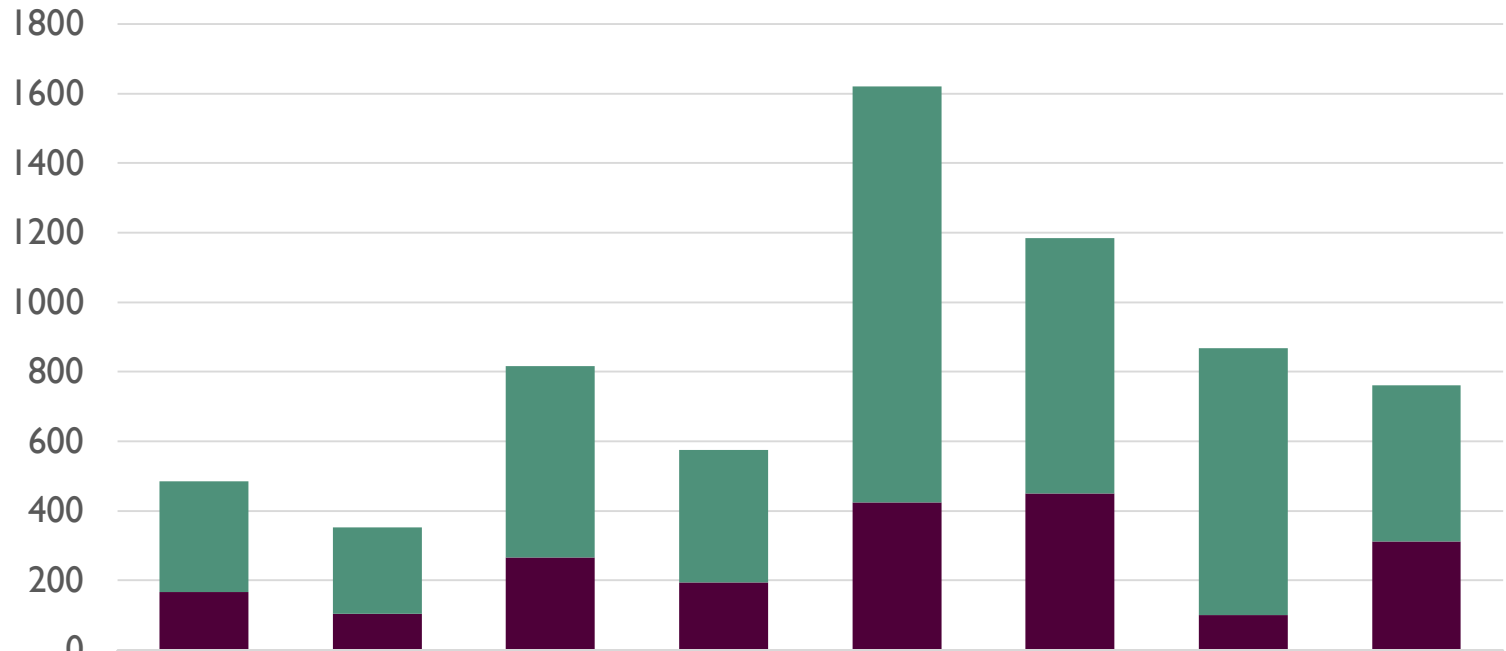
Operating Status (April 15, 2020)



- Centers in “rural” counties are more likely to be operating than are non-rural counties

Capacity & Attendance – Rural vs. Nonrural

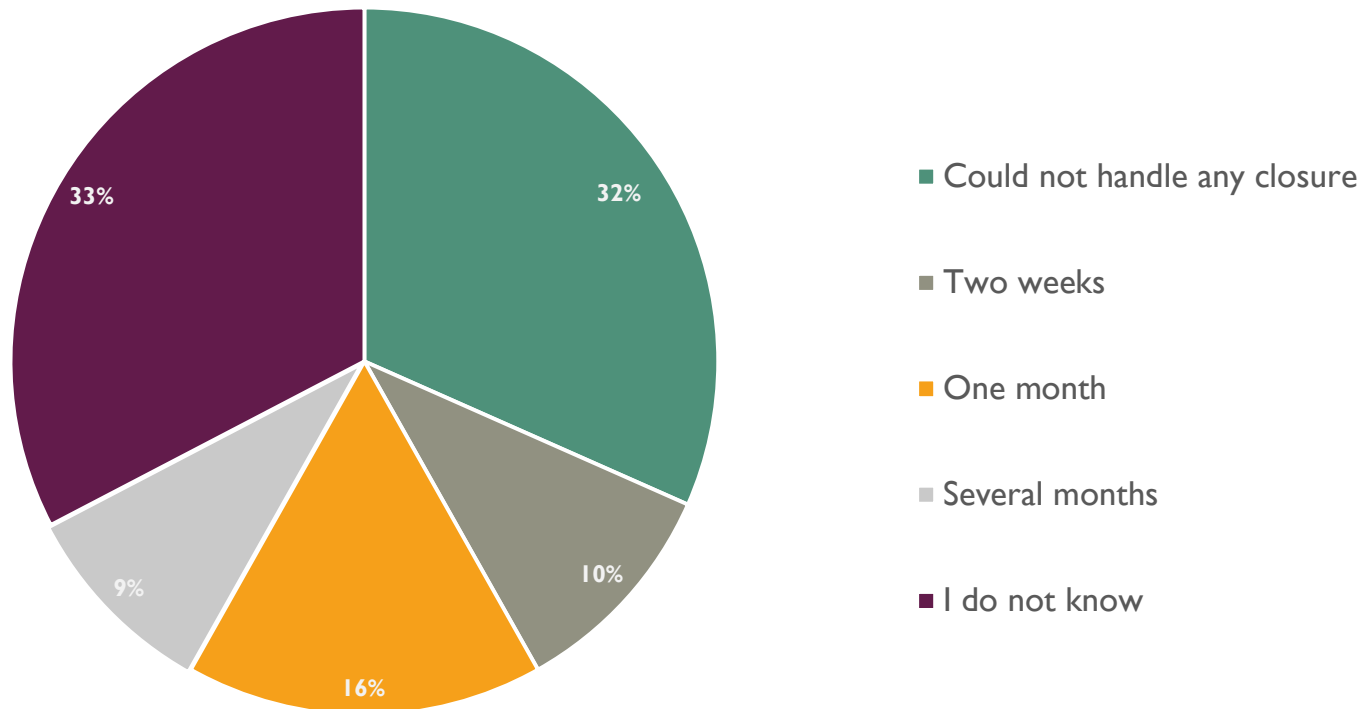
Capacity and Current Attendance, by Age and Region



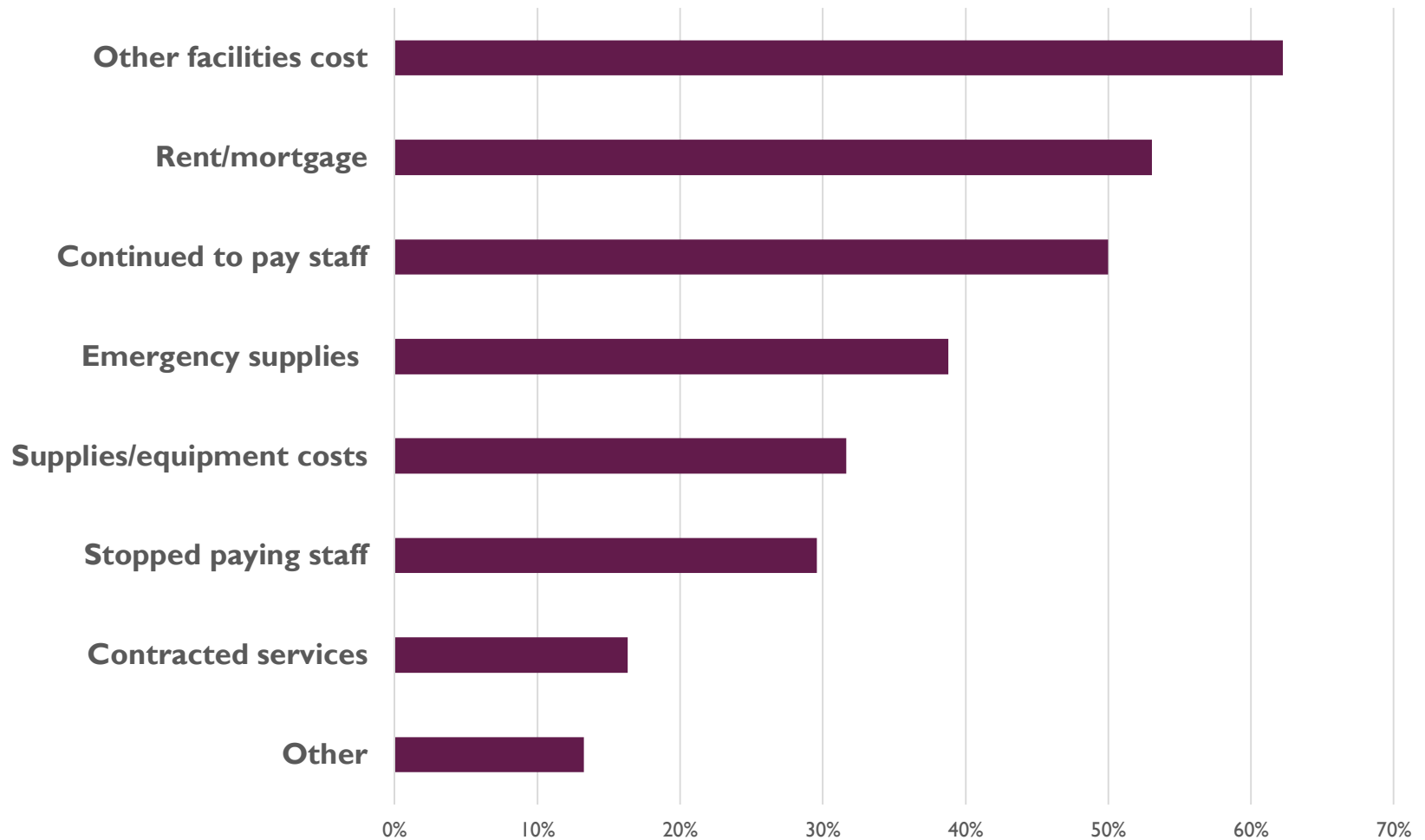
	Non-Rural	Rural	Non-Rural	Rural	Non-Rural	Rural	Non-Rural	Rural
	Infants		Toddlers		Preschoolers		School Age	
■ Not Attending	319	248	550	382	1196	734	767	448
■ Serving	167	105	267	194	424	451	101	313

Continuing Operations

How long could you center financially survive closure?



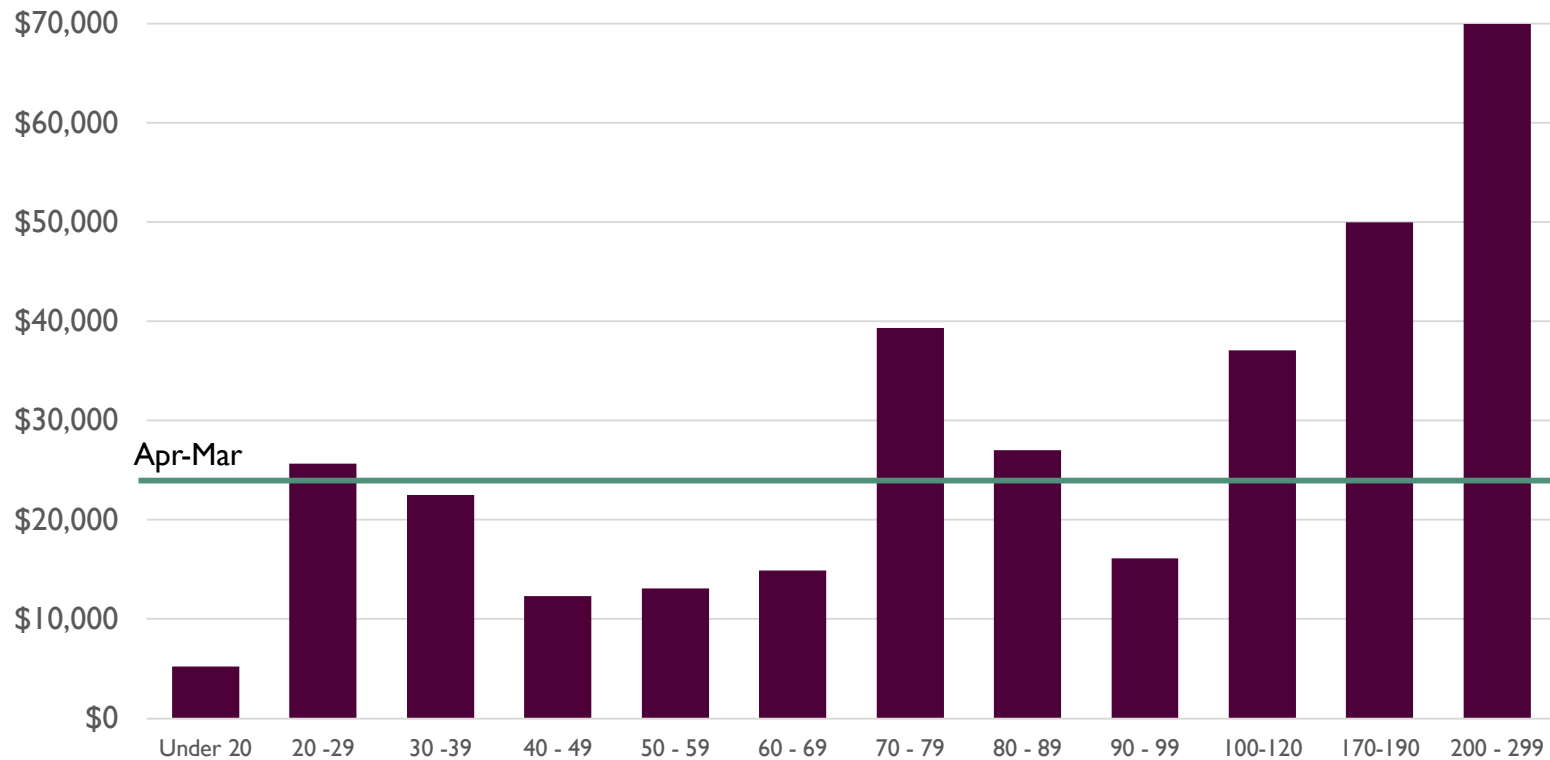
Cost Concerns



Economic Losses

- Current loss: **\$22,033**
- Projected loss: **\$31,070** (Apr 15- May 15)

Average Losses by Center Capacity*



What's Next?



Now What?

Outreach & Advocacy

- ICS sharing results and engaging with state agencies, nonprofits (local and state) and elected officials
- Hearing concern both for parents' ability to return to work and impact on child care officials as small business owners

Resource Development

- Ongoing blog series on COVID-19 related issues: <https://www.instituteforchildsaccess.org/category/covid-19/>
- Resources for Child Care Providers (navigating PPP, Unemployment Insurance, etc.): <https://www.instituteforchildsaccess.org/resources-for-child-care-provider-concerns/>

Resources

Read the full report:

<https://bit.ly/ChildCareCOVIDreport>

Resources for child care providers:

<https://www.instituteforchildsuccess.org/resources-for-child-care-provider-concerns/>

Rural vs. Non-Rural Comparisons:

<https://www.instituteforchildsuccess.org/covid19s-impact-on-child-care-in-rural-counties/>





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