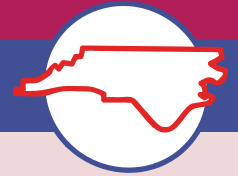


An Unsustainable Status Quo

We All Bear the Burdens of an Underfunded System

March 2025

NORTH CAROLINA



The problems are clear: The structural challenges that have always plagued the child care sector are growing. Program costs are rising, staff burnout and turnover is increasing, and absent sufficient public support, families are having to pay more than they can afford for the child care they need. As a result, the supply of high-quality child care everyone in our society needs to be successful cannot match the demand for it.

The solutions remain clear: Public investments in child care and early learning are needed to build a system that works, and that ensures early childhood educators are supported in joining and remaining part of the early childhood education (ECE) profession, and that parents are able to access and afford high-quality care that meets their needs and the needs of their children.

In January 2025, more than 10,000 early childhood educators from all states and settings - including centers, family child care homes, faith-based programs, Head Start, and public preschool programs - responded to a new ECE field survey from NAEYC. The survey results and accompanying stories illustrate the ongoing challenges facing the field, the ways those challenges impact both families and providers, and the need for additional and ongoing public investment in this sector.

Here are some reflections from survey respondents in North Carolina:

“I face secondary trauma working with teachers who can’t make ends meet and are tired and stressed by the challenging behaviors they face.” - Coach/Professional Development

“I’m less optimistic about the industry . . . I am extremely burnt out managing administration tasks, continuous enrollment changes, staff health needs and facility improvements” - Director/Administrator

“Very stressed after the hurricane hit. It has caused so many challenges and damage.” - Early Childhood Educator

“I am too invested in the field and have a desire to do my best to improve the quality of care that can be provided to leave the field. However, I lose staff daily to other career fields that are less demanding and require less from them while they are compensated at a greater rate.” - Director/Administrator

“The system is broken . . . There’s very little respect for the field and increasingly high needs for children (behavior and developmental concerns). It’s just becoming too much.” - Director/Administrator

Here's a brief summary of the survey data from North Carolina:

	STATE	NATIONAL
Total sample size	260	9,883
Total employed in family child care homes	26	1,087
Total employed in child care centers	131	5,336
Total sample of center directors and family child care owner/operator respondents working in child care centers and family child care homes	128	4,550

AMONG ALL RESPONDENTS:

Compared to this time last year . . .

% indicating they are more burned out now	48%	47%
% indicating their economic situation has worsened	35%	34%
% indicating their economic situation has improved	15%	16%

Over the last year . . .

Supply

% reporting at least one child care program in their community OPENING over the last year	33%	40%
% reporting at least one child care program in their community CLOSING over the last year	58%	56%

Benefits

% reporting they do not have health insurance	25%	16%
% reporting they do not have access to paid vacation time	33%	35%
% reporting they do not have retirement savings	45%	42%
% reporting they do not have access to paid family or medical leave	62%	57%

AMONG CHILD CARE CENTER DIRECTORS AND FAMILY CHILD CARE OWNER/OPERATORS:

Over the last year . . .

Program Enrollment

% indicating their program was under-enrolled relative to capacity (nationally the top reasons for underenrollment were related to affordability and staffing challenges, not a lack of demand)	59%	55%
% indicating that they raised tuition	46%	55%

Staffing

% indicating that they raised wages	47%	60%
-------------------------------------	-----	-----

Costs

% indicating their rent costs went up	35%	32%
% indicating their liability insurance costs went up	40%	46%
% indicating their property insurance costs went up	39%	45%

Methodology This online survey, created and conducted by NAEYC using SurveyMonkey, represents the responses of a non-randomized sample of 10,066 individuals working in early childhood education settings who completed the survey in English or Spanish between January 6-27, 2025. To generate a more representative national sample from the pool of responses, a probability proportional to size (PPS) methodology was used to pull samples by state that are benchmarked to the share of the total early childhood workforce by state. The authors relied upon the methodology employed by the CSCCE's Early Childhood Workforce Index estimates of the size of each state's ECE workforce using U.S. Census Bureau ACS data (https://cscce.berkeley.edu/wp-content/uploads/2024/11/Appendix-Table-2.1_2024-Index.pdf). The final sample size for analysis is 9,883. In contrast, for the state-level analysis, the entire sample of responses from each state were used. We are unable to supply detailed analysis in states for which there are very small sample sizes across sub-groups.

The survey links were shared widely through email newsletters, listservs, social media, and via partnerships, and 10 randomly selected respondents were provided with a \$100 gift card for participation in a sweepstakes. Given the constantly changing and widely varying nature of the crisis, the broad analysis from this survey is intended to present the experiences of the respondents, as captured in the moment that they take the survey, with extrapolations for the experiences of the field and industry at large. Additional information available at www.naeyc.org/pandemic-surveys.