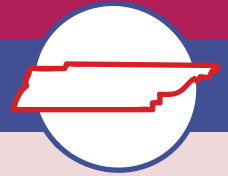


An Unsustainable Status Quo

We All Bear the Burdens of an Underfunded System

March 2025

TENNESSEE



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 Tennessee:

“This field has my heart. I have spent over a decade in this field growing in many ways and desire to continue spending the rest of my life in this field in some capacity.” - Director/Administrator

*“It is extremely difficult and expensive to train and support staff and then many don’t stay with it.”
- Director/Administrator*

“Our staff is stronger and better for the first time after COVID. It was extremely difficult to hire good teachers. All of the grants we received were very helpful and allowed us to make upgrades to our classrooms and playground!” - Director/Administrator

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

| | STATE | NATIONAL |
|--|-------|----------|
| Total sample size | 101 | 9,883 |
| Total employed in family child care homes | 4 | 1,087 |
| Total employed in child care centers | 58 | 5,336 |
| Total sample of center directors and family child care owner/operator respondents working in child care centers and family child care homes | 51 | 4,550 |

AMONG ALL RESPONDENTS:

Compared to this time last year . . .

| | | |
|--|-----|-----|
| % indicating they are more burned out now | 42% | 47% |
| % indicating their economic situation has worsened | 31% | 34% |
| % indicating their economic situation has improved | 20% | 16% |

Over the last year . . .

Supply

| | | |
|---|-----|-----|
| % reporting at least one child care program in their community OPENING over the last year | 51% | 40% |
| % reporting at least one child care program in their community CLOSING over the last year | 66% | 56% |

Benefits

| | | |
|---|-----|-----|
| % reporting they do not have health insurance | 21% | 16% |
| % reporting they do not have access to paid vacation time | 19% | 35% |
| % reporting they do not have retirement savings | 43% | 42% |
| % reporting they do not have access to paid family or medical leave | 59% | 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) | 48% | 55% |
| % indicating that they raised tuition | 68% | 55% |

Staffing

| | | |
|-------------------------------------|-----|-----|
| % indicating that they raised wages | 67% | 60% |
|-------------------------------------|-----|-----|

Costs

| | | |
|--|-----|-----|
| % indicating their rent costs went up | 23% | 32% |
| % indicating their liability insurance costs went up | 52% | 46% |
| % indicating their property insurance costs went up | 51% | 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.