



2025 Orange County Child Care and Development Planning Council (LPC) Needs Assessment

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Prepared by

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Prepared for

Orange County Child Care and
Development Planning Council



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Introduction

Access to high-quality early childhood education and care is a critical factor in shaping the future success of children, families, and communities. In Orange County, ensuring that every child has access to early learning opportunities is not only a matter of educational equity but also a key driver of economic stability for families and the broader workforce. The 2025 Orange County Child Care and Development Planning Council (LPC) Needs Assessment provides a view of the current landscape of child care availability, affordability, and quality in the county, highlighting the challenges and opportunities of families and providers.

Early childhood care plays a crucial role in child development, fostering cognitive, social-emotional, and physical growth during a child's formative years. Research consistently shows that children who receive high-quality early learning experiences are better prepared for kindergarten, demonstrate higher academic achievement, and develop essential social skills that contribute to long-term success. This needs assessment seeks to provide a data-driven overview of current access, availability, and potential barriers families face. This report is a vital tool for stakeholders—including educators, child care providers, policymakers, and community leaders—who play a role in shaping early childhood education and care.

Findings from this assessment highlight the financial strain that many families experience due to the high cost of child care, particularly in a region where the cost of living continues to rise. Parents frequently report difficulties in securing affordable, high-quality child care that meets their work schedules and aligns with their children's developmental needs. Additionally, the availability of licensed child care facilities does not fully meet the demand, leaving many families on waitlists or struggling to find alternative care arrangements. Child care providers also face challenges, including workforce shortages, operational costs, and meeting the needs of children from diverse backgrounds, including English learners and children with disabilities.

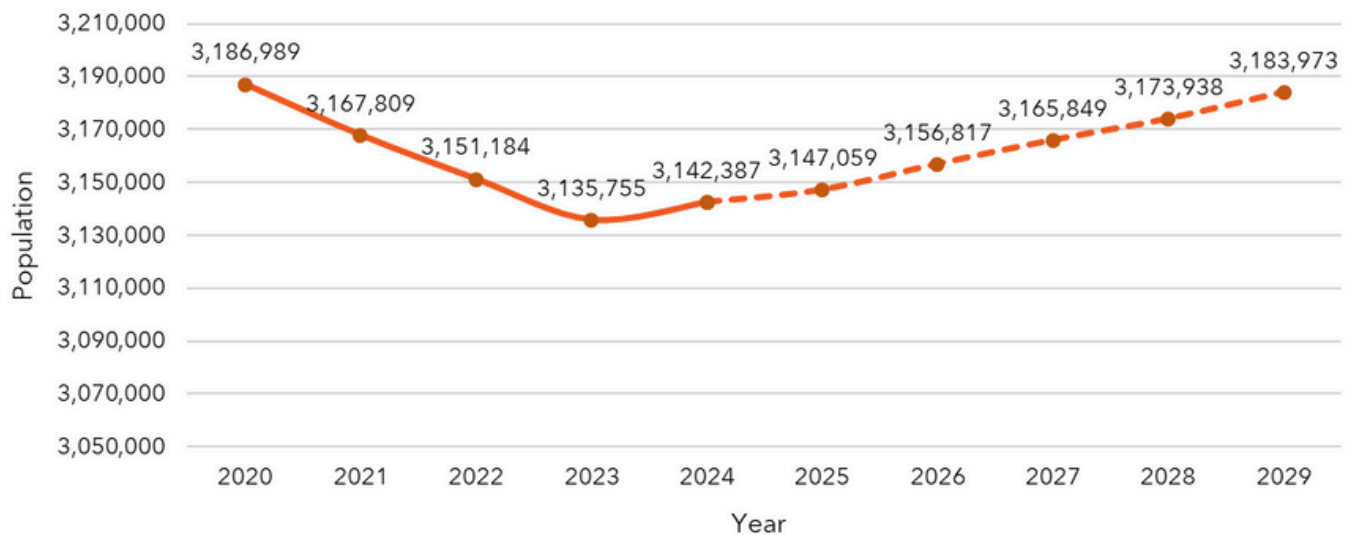
As Orange County's population evolves and economic pressures impact family stability, the demand for high-quality child care continues to grow. Families face challenges such as affordability, program availability, and alignment with work schedules, while providers navigate workforce shortages, operational costs, and regulatory requirements. By analyzing these issues, the 2025 LPC Needs Assessment aims to support informed decision-making and strategic planning to enhance child care services across the county.

The findings in this report serve as a foundation for action, guiding local planning efforts and policy recommendations to improve early childhood education.

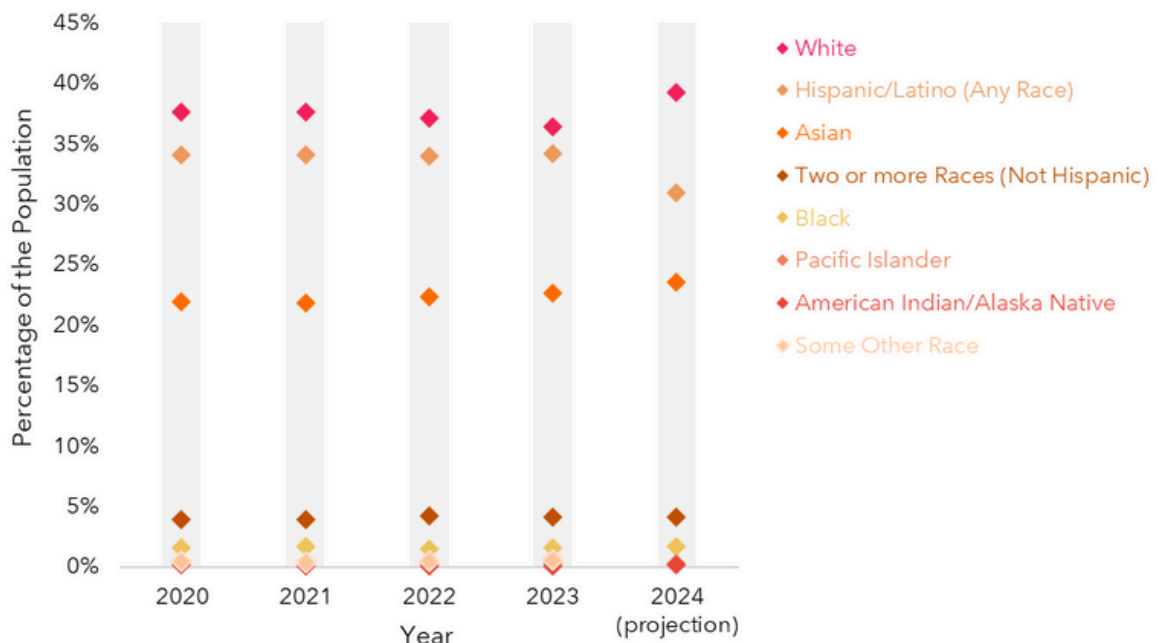
County Population Demographics¹

Orange County's total population has steadily declined since 2020 but is projected to experience moderate fluctuations through 2029, with gradual shifts that may influence the demand for child care services. As the county's demographics continue to evolve, the availability and accessibility of early childhood education should align with these changes to ensure families receive adequate support. Additionally, the racial and ethnic composition of the county highlights the diversity of young children who will enter preschool and kindergarten in the coming years. With a significant proportion of the population identifying as Hispanic/Latino, Asian, and other racial groups, Orange County early childhood providers should be prepared to serve racially diverse students.

Orange County Population Totals and Projections 2020-2029



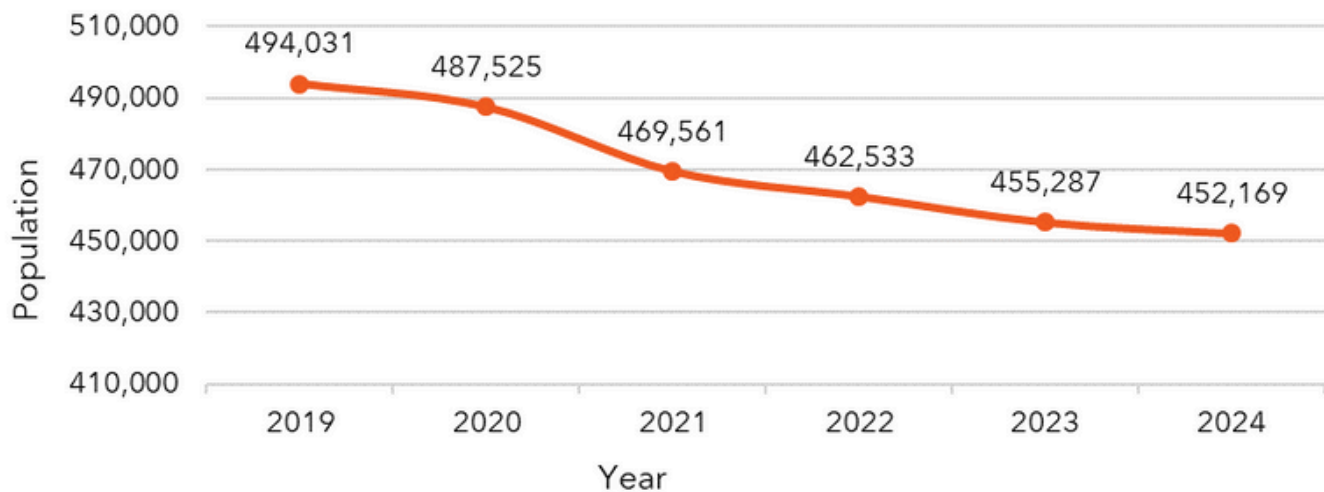
Orange County Population Totals by Race/Ethnicity (Most Recent Five Years)



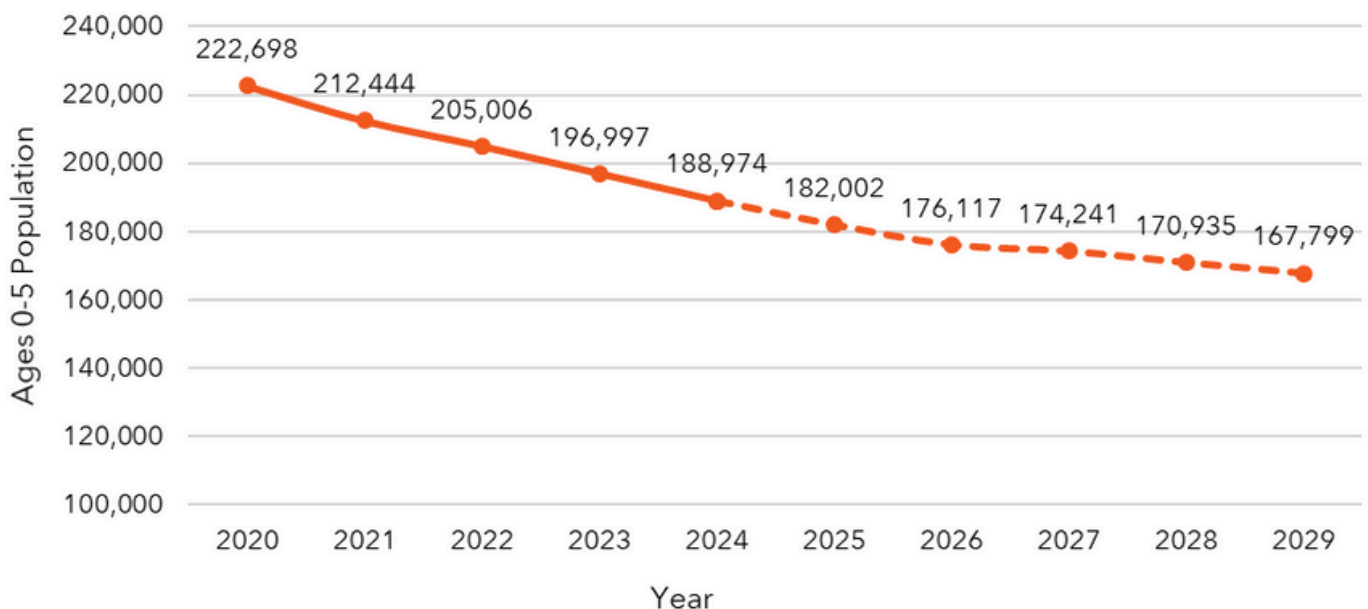
County Population Demographics¹

Despite projections that the total population will increase in next five years, the population of children aged 0-5 in Orange County is projected to decline greatly through 2029, which could have implications for early childhood education programs and child care demand. While child care shortages remain a concern, these demographic shifts suggest that future enrollment patterns should be closely monitored to ensure resources align with changing community needs. Additionally, age-specific projections for children 0-5 indicate gradual variations in population distribution within this group, which may affect preschool, transitional kindergarten, and infant-toddler care availability. Policymakers and child care providers should consider these trends when planning for future capacity, ensuring that programs remain accessible and responsive to community demand.

Enrollment in Orange County Schools 2019-2024 (TK-12)

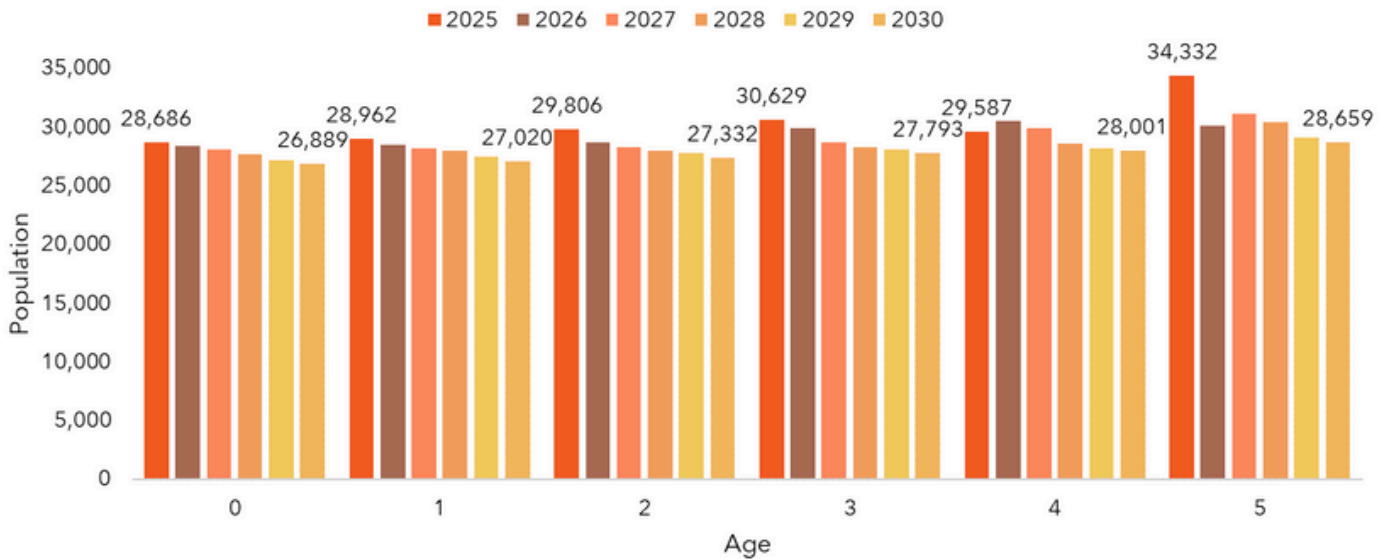


Orange County 0-5 Population Totals and Projections 2020-2029



County Population Demographics¹

Orange County Ages 0-5 Totals and Projections By Age 2025-2030

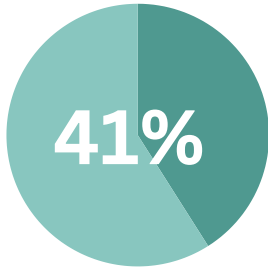


Number of Orange County Students in TK/K by Race/Ethnicity in the last 5 years

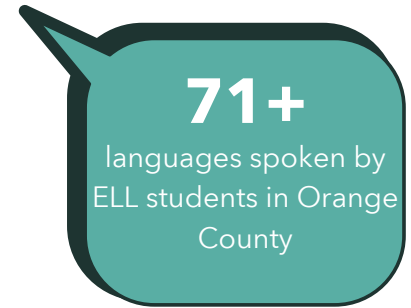
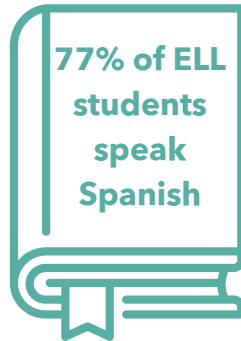
	2020	2021	2022	2023	2024
African American	408	345	393	430	448
American Indian or Alaska Native	91	68	77	46	62
Asian	5,918	5,626	5,316	5,925	6,422
Filipino	679	748	652	725	744
Hispanic or Latino	19,031	17,030	17,480	18,590	19,270
Pacific Islander	93	86	101	109	113
White	8,900	7,137	7,358	7,783	8,119
Two or More Races	2,104	1,846	1,973	2,233	2,256
Not Reported	679	590	710	702	819

County Linguistic Diversity²

Orange County is home to a linguistically diverse student population, with 41% of transitional kindergarten (TK) and kindergarten students identified as English Language Learners (ELLs). Spanish is the predominant non-English language spoken, accounting for 77% of ELL students, though more than 71 languages are represented across the county.

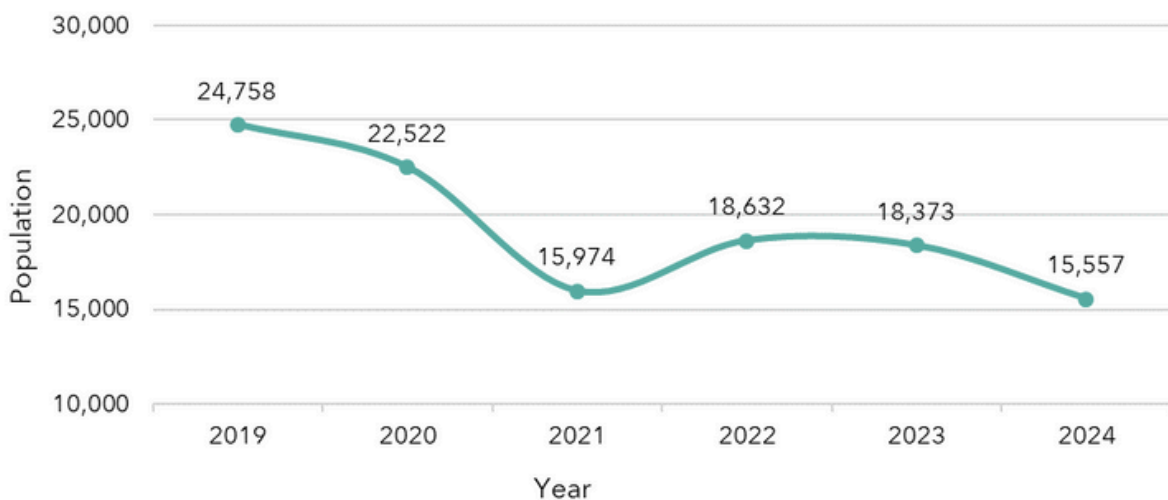


41%
of TK and K students in Orange
County are English Language
Learners (ELL)



Enrollment in OC schools has declined 8.5% in the past five years, whereas enrollment of ELL students has declined 37.2%. As enrollment patterns shift, schools and child care providers should also consider how best to engage multilingual families.

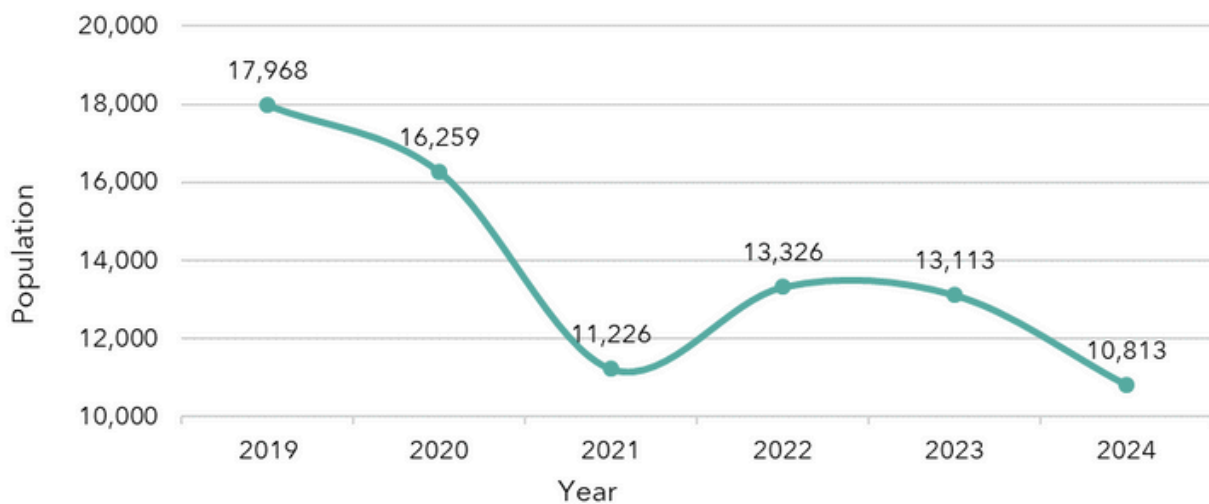
Number of English Language Learners in Orange County 2019-2024 (K-12)



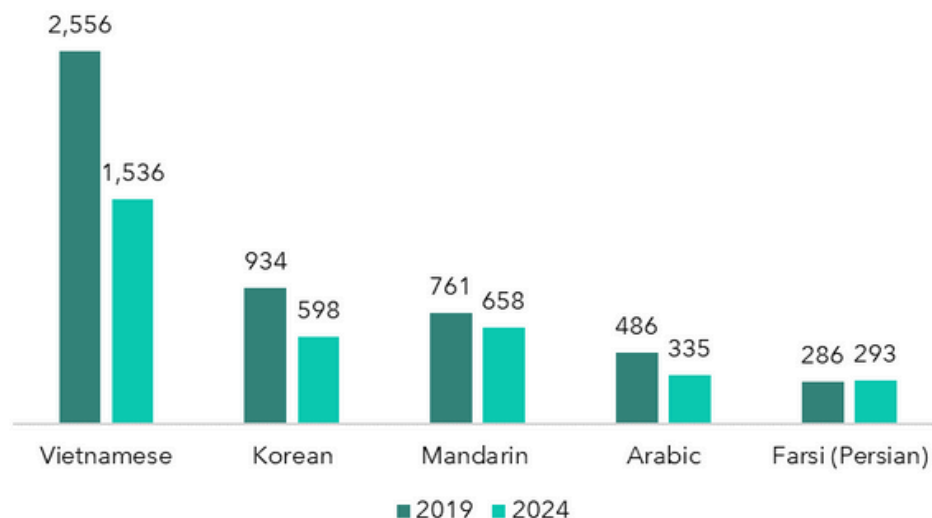
County Linguistic Diversity²

The number of Spanish-speaking ELL students in Orange County remains significantly higher than other language groups, reinforcing the need for targeted bilingual support and Spanish-language outreach in early education programs. However, several other languages, such as Vietnamese, Mandarin, and Korean, are also spoken by young learners, emphasizing the importance of multilingual accessibility in early childhood services. Given these linguistic trends, child care providers and educators should explore strategies to strengthen dual-language learning opportunities and ensure that non-English-speaking families have access to information about available child care and early education programs.

Number of Spanish Speaking English Language Learners in Orange County 2019-2024



Number of English Language Learners in Orange County 2019 & 2024 (Most Common Languages)



Note. Languages selected are the top 5 most spoken non-English languages other than Spanish.

Special Student Populations^{4, 5, 6}



61,151 students in Orange County were on an IFSP or IEP in 2023-2024



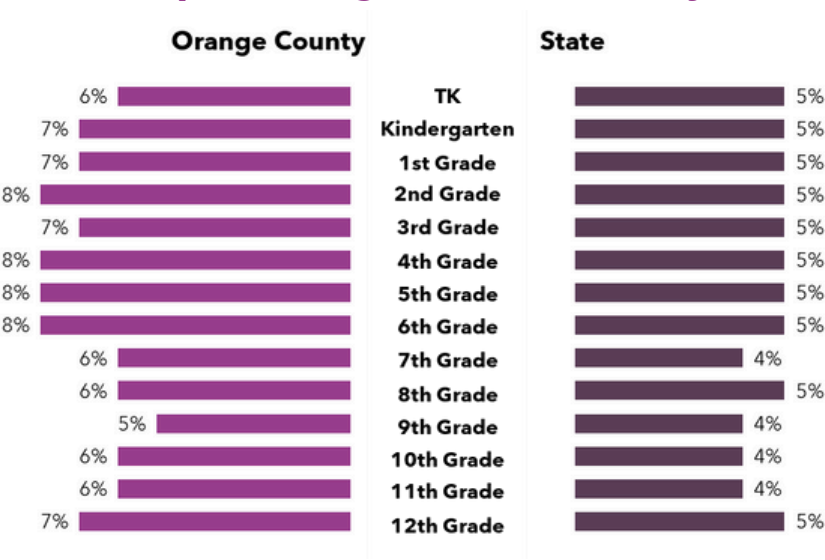
4,017 students in Orange County on an IFSP or IEP in 2023-2024 were age 5 or younger



56% of Special Education Enrolled students are in "regular class" 80% or more of the day

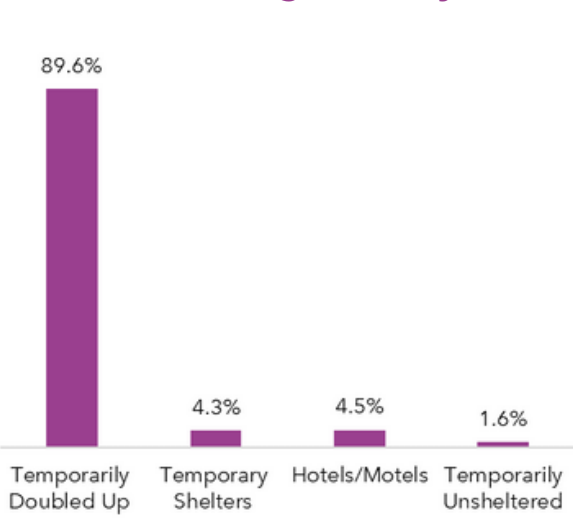
Students in Orange County are facing a variety of challenges. More than 4,000 students ages 5 years and younger have an Individualized Family Service Plan (IFSP) or Individualized Education Program (IEP), but just over half (56%) of Orange County Special Education enrolled students are in their general education classes most of the day. Additionally, 6% of TK and 7% of Kindergarten students experienced homelessness in 2023-24, most of which are living in temporarily doubled-up housing, which was slightly higher than the statewide rate (5%). This data on Orange County students' needs demonstrates early learning providers and community partners should prepare to support students using inclusive practices, trauma-informed care, and support for families facing housing instability.

Percentage of Youth Experiencing Homelessness by Grade



Note. Data Source: CA Department of Education

Percentage of Youth Experiencing Homelessness by Dwelling in Orange County



Note. Data Source: CA Department of Education



421 students in Orange County were identified as Migrant students in 2023-2024*

These estimates were based on CDE cumulative enrollment data where numerous values were suppressed due to small samples



722 children under 5 were in Foster Care in the County in 2023-2024

Note. Data Source: California Child Welfare Indicators Project

Family Income and Employment



The median income for a family of four in Orange County is **\$149,604**



Self-sufficient income threshold for a family of 4: **\$125,188**

The median child care costs are nearly equivalent to housing costs in Orange County. Given these economic pressures that families are facing, expanding access to affordable child care and financial assistance programs should be a priority to ensure that all families can provide stable early learning opportunities for their children. Additionally, policies that address child care affordability and support working parents could help reduce the economic burden on families.

Median Cost of Common Living Expenses

	Housing	Food	Child Care	Transportation	Health Care	Taxes	Other	Total Cost of Common Living Expenses
Annual Median Estimated Costs	\$33,569	\$13,211	\$30,429	\$17,946	\$8,060	\$20,290	\$22,220	\$145,725
% of Median Annual Income (\$149,604)	22%	9%	20%	12%	5%	14%	15%	97%

House Affordability Metrics by County

	Median Home Cost	Monthly House Payment	Minimum Qualifying Income	Median County Income
Orange County	\$1,365,000	\$8,730	\$349,200	\$149,604
Los Angeles County	\$822,950	\$5,260	\$210,400	\$113,191
San Diego County	\$981,000	\$6,280	\$251,200	\$149,697
Riverside County	\$630,000	\$3,030	\$161,200	\$107,080
San Bernardino County	\$487,270	\$3,120	\$124,800	\$99,260



10% of children under 5 in Orange County live in poverty

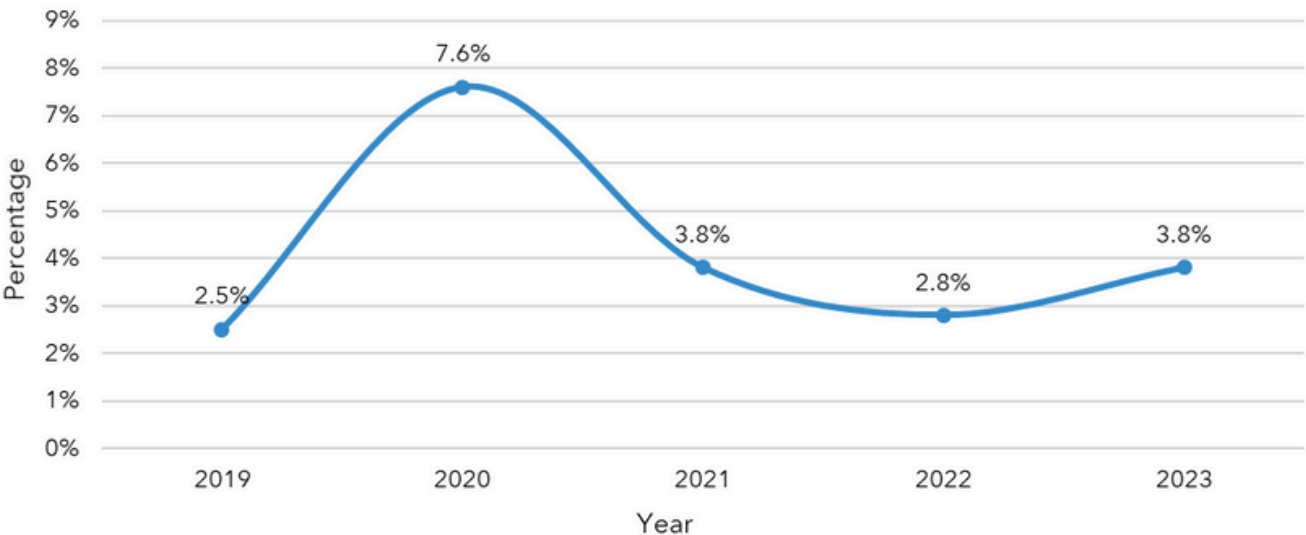


52% of households with children under 6 struggle financially

Family Income and Employment ⁷⁻¹⁰

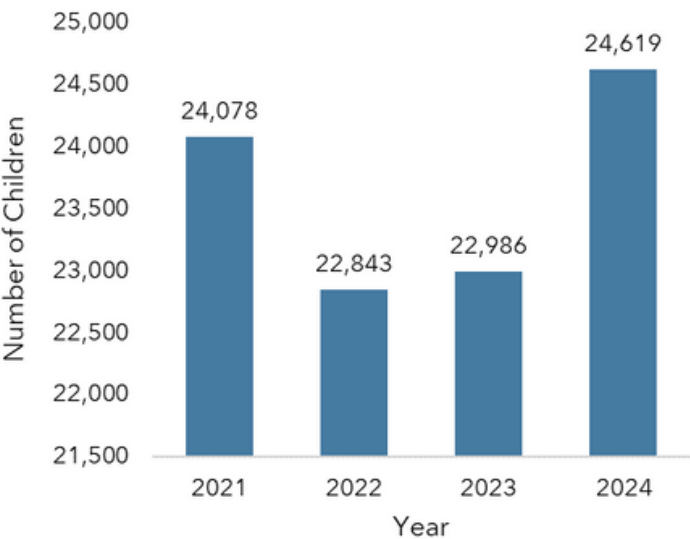
Many families rely on public assistance programs such as CalWORKs and CalFresh, reflecting the financial strain faced by lower-income households. The number of children participating in these programs suggests that economic barriers continue to affect access to quality early childhood education. Ensuring that child care services align with the needs of working families—particularly those relying on assistance programs—could help improve economic stability and support children’s early development.

Unemployment Rate in Orange County 2019-2023



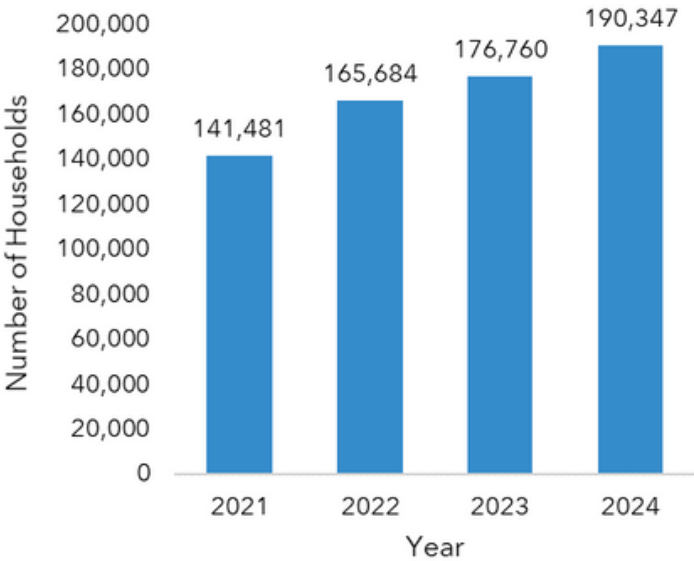
Note. Data Source: Employment Development Department: State of California

Number of Children Participating in CalWORKs in Orange County



Note. Data Source: California Department of Social Services

Number of CalFresh Households in Orange County, Yearly Average



Note. Data Source: California Department of Social Services

Early Childhood Care and Quality^{11,12}



The county has 841 licensed child care Centers and 837 Family child care Homes



As of December 2024, there were 5,945 children and 4,056 families on a waitlist for placement in child care

Child care availability in Orange County remains a pressing issue, with demand far exceeding supply. As of December 2024, there were 5,945 children and 4,056 families on a waitlist for enrollment in child care services, highlighting the ongoing shortage of accessible care options. Although there are vacancies across the 841 licensed child care centers and 837 family child care homes, total capacity does not fully meet the varied needs of families, particularly those seeking care for infants and toddlers.

Total Child Care Capacity in Orange County in 2024/25

Licensed Centers

73,820

Family child care Homes

10,840

Total Child Care Vacancy in Orange County in 2024/25

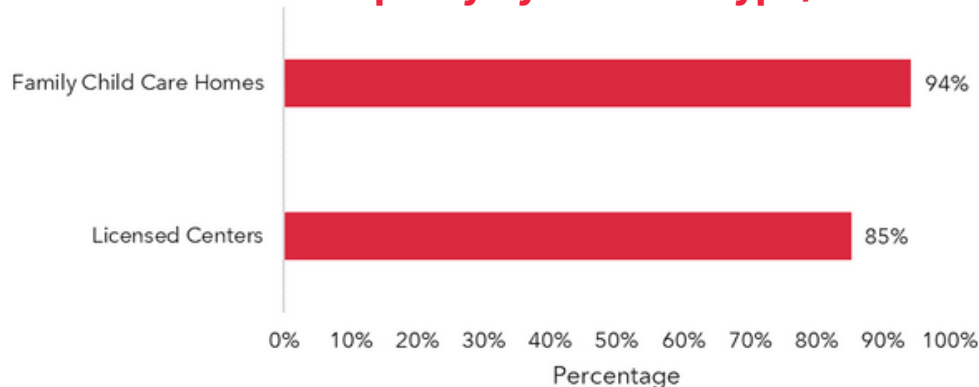
Licensed Centers

4,237

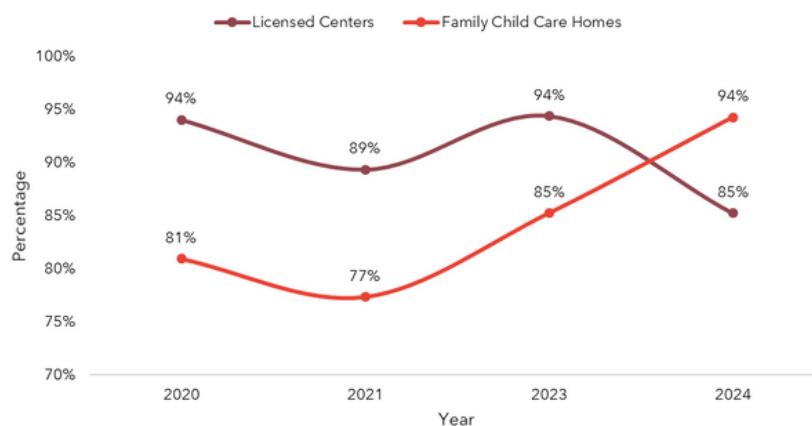
Family child care Homes

1,602

Child Care Capacity By Provider Type, 2024



Child Care Capacity By Provider Type, 2020-2024

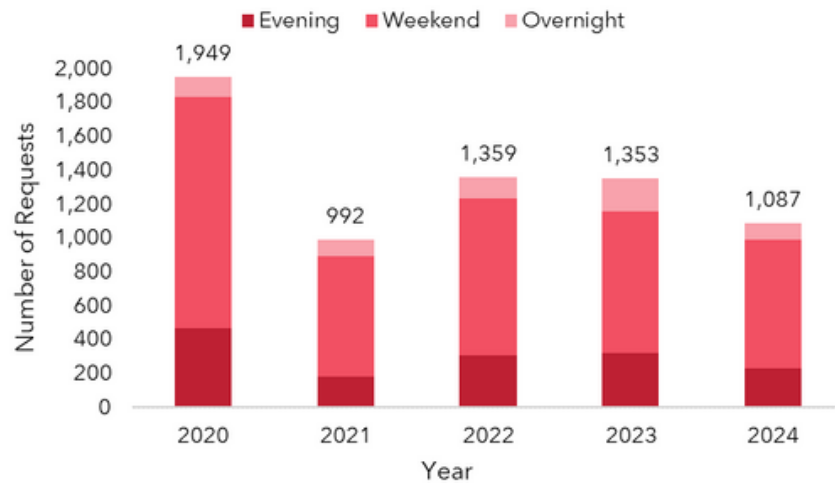


Capacity % equals the number of spaces filled divided by the total capacity

Early Childhood Care and Quality^{11,12}

In addition to working hours, there is also a need for care during nontraditional hours, particularly on weekends. Although the number of requests for nontraditional hours care has decreased since 2020, it still remains a concern among families who work outside of traditional child care center hours.

Number of Nontraditional Hours Care Requests 2020-2024



Quality Start OC Centers

392 sites

**275 Center-Based
117 Family Child Care Centers**

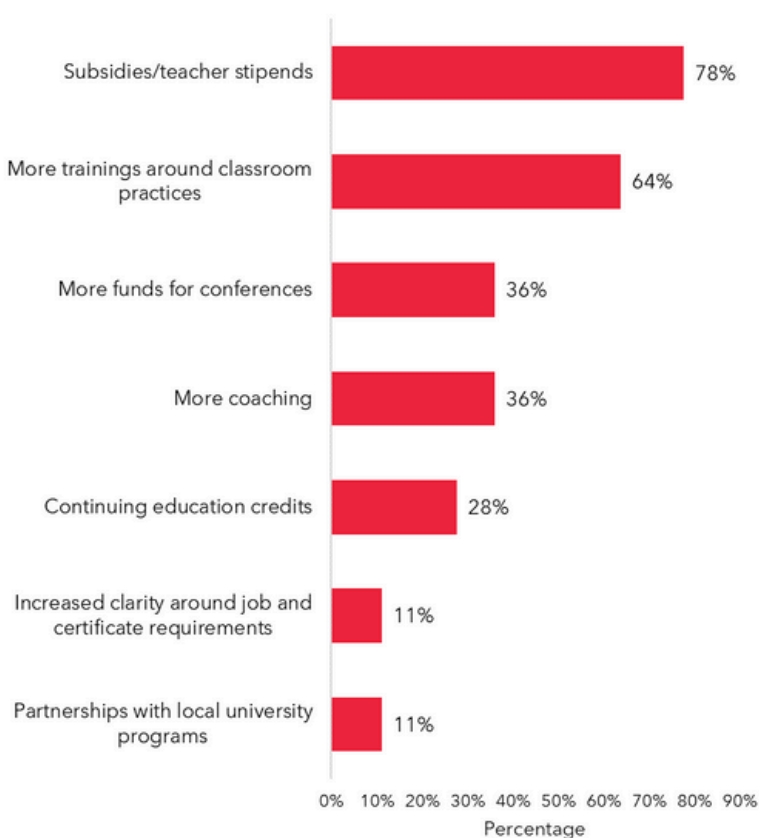
**42 Orange County
cities**

Quality Start OC supports quality early care and education in Orange County under the state's Quality Counts CA (QCC) initiative. The Quality Start OC Network supports early learning professionals from a variety of program types including State Preschool, private, non-profit, family child care home, Head Start or other early learning program. Quality Start OC participation provides access to free professional learning opportunities and program quality coaching to expand educators knowledge and skills, support in continuous quality improvements efforts and incentives and resources to help educators provide developmentally appropriate early learning experiences. Nearly 400 sites participate in Quality Starts OC, which accounts for nearly a quarter (23%) of licensed centers.

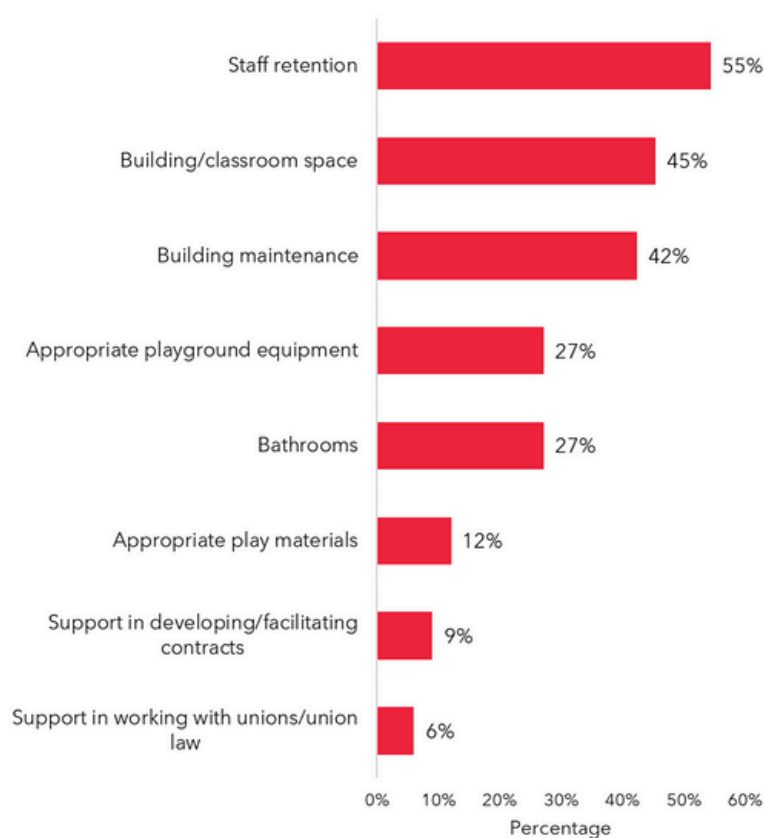
Early Childhood Care and Quality

Child care providers in Orange County face significant operational challenges, including staff retention, recruitment, and financial sustainability. Just over half of provider survey respondents (55%) indicated that staff retention was one of their greatest needs. To improve staff retention and recruitment methods, the majority indicated that incentives like subsidies and stipends would be effective as well as more trainings. These findings suggest a need for community partners to collaborate and identify ways to develop professional learnings and financial support to those in the field. Additionally, at least 50% of providers report that families struggle with program costs, availability, and lack of knowledge about their options. Parents frequently rely on word-of-mouth, school websites, and online searches to find child care, indicating a need for more accessible and centralized information sources.

Provider Perceptions of Most Effective Staff Retention/Recruitment Methods (n=36)¹²



Provider Perceptions of Highest Facility/Operations Needs (n=33)¹²



At least 60% of Providers provided Site Tours, Checklists and Enrollment Support to families during the enrollment process

Providers most commonly reported using family/friends, websites, and brochures to advertise their programs

At least 50% of Providers were concerned about the following challenges for families:

- Knowledge of programs
- Cost of programs
- Availability of programs
- Before/after care
- Special needs

Parent Needs ¹³

Parents' Top Challenges Around Child Care/School:

- Concerns about cost of programs
- Lack of knowledge of programs available
- Concerns about timing of program (half-day vs. full-day)

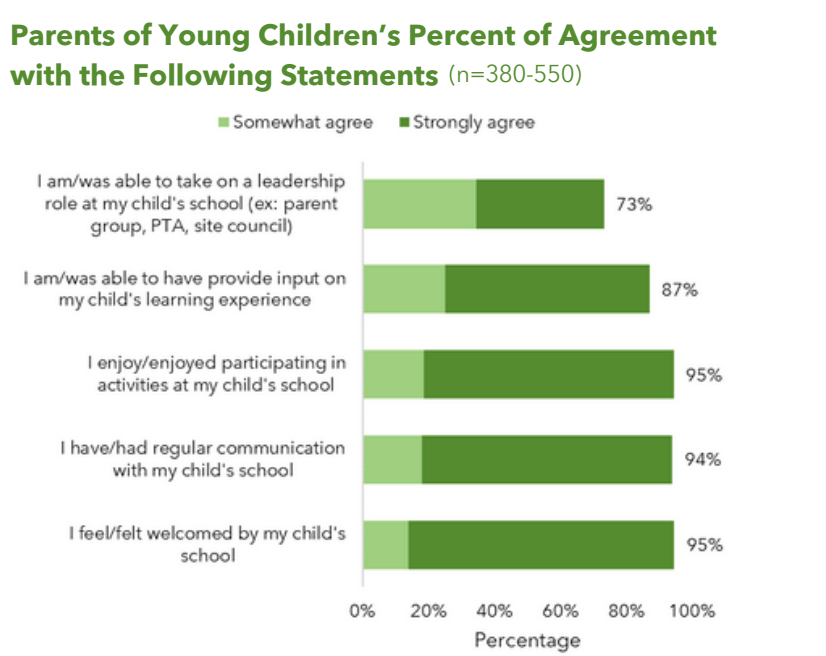
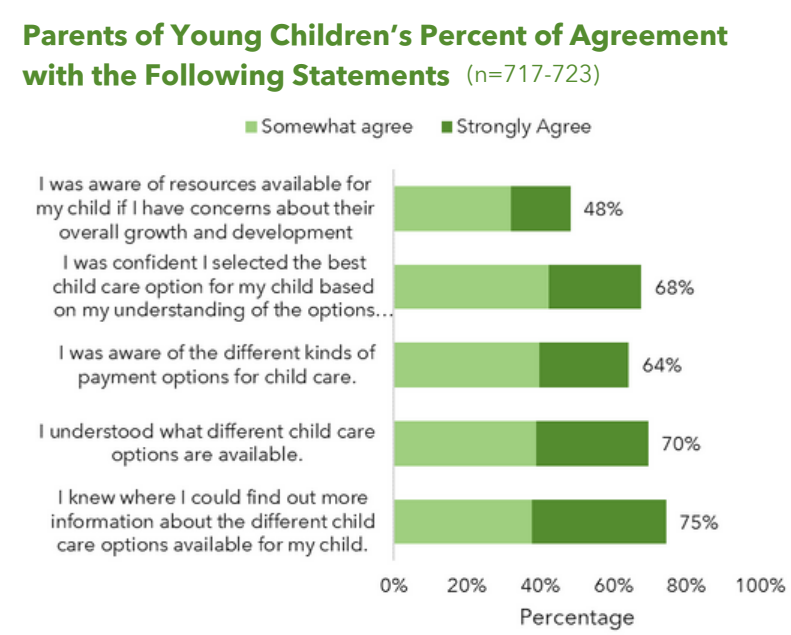
Parents' Most Popular Methods to Learn More About Options:

- School/center websites
- Google searches
- Family, friends, and other person-to-person connections

Parents' Highest Priorities Around Child Care/School:

- A safe physical environment
- Age-appropriate activities and services
- Activities and staff trainings that ensure all students are treated equally

Consistent with provider feedback, parents also expressed concerns about cost of programs and lack of knowledge of programs. Parents frequently rely on word-of-mouth, school websites, and online searches to find child care, indicating a need for more accessible and centralized information sources. They expressed their priorities are having a safe and age-appropriate program with staff who ensure that students are treated equally. After finding child care, the majority of parents expressed satisfaction with their schools, demonstrating the high-quality programs in Orange County.



It seems you have 3 options: Montessori (very expensive), highly academic and not developmentally appropriate, or faith-based. It was hard to find a play-based, developmentally appropriate preschool at a reasonable cost. (I started looking for a 2 yr old program so [we] couldn't use the school district) - Parent

My family is a dual-income household and we found it incredibly challenging to find an early child education program that allows us to work full-time hours and have adequate, affordable child care. This is a major concern now that we have learned our son will qualify for TK in 2024-25. - Parent

Key Findings

- 1. High Cost of Living Creates Barriers for Families:** The median family income in Orange County is \$149,604, yet the estimated self-sufficiency income for a family of four is \$125,188. Many families struggle with high housing, child care, and living costs, with 52% of households with children under six facing financial hardship.
- 2. Child Care Demand Exceeds Availability:** As of December 2024, there were 5,945 children and 4,056 families on a child care waitlist, indicating a significant shortage of accessible child care slots. While the county has 841 licensed child care centers and 837 family child care homes, demand continues to outpace supply.
- 3. Affordability and Accessibility Are Major Parental Concerns:** Parents cite cost, lack of awareness of available programs, and program schedules (half-day vs. full-day) as top concerns when seeking child care. Many express difficulty in finding affordable, developmentally appropriate programs. Child care costs account for approximately 20% of the median income in Orange County, which is nearly the same as housing costs.
- 4. English Learners Remain a Key Student Group:** 41% of transitional kindergarten and kindergarten students are English Language Learners, with 77% of ELL students speaking Spanish. Ensuring language accessibility and culturally responsive child care programs remains a priority.
- 5. Special Student Populations Face Unique Challenges:** In the 2023-2024 academic year, 4,017 children under age five were enrolled in special education through an Individualized Family Service Plan or Individualized Education Program. Additionally, 722 children under five were in foster care, highlighting the need for targeted early intervention and support services.
- 6. Providers Struggle with Workforce and Operational Challenges:** Child care providers report staff retention, funding, and program sustainability as key operational challenges. More than half of providers cited staff retention as a top concern and indicated that stipends and professional learning could help to motivate retention and recruitment of staff.
- 7. Parental Awareness and Information Sources Are Limited:** Many parents rely on word-of-mouth, school websites, and Google searches to find child care programs. The lack of centralized, easy-to-access information may contribute to gaps in enrollment and awareness of available services.
- 8. Disparities in Child Care Access Impact Working Families:** Many parents express frustration with the limited availability of child care options that align with full-time work schedules. One parent said, "My family is a dual-income household and we found it incredibly challenging to find an early child education program that allows us to work full-time hours and have adequate, affordable child care."

Acknowledgements

Thank you to the LPC Ad-Hoc Committee for their dedicated work crafting and shaping this final needs assessment. Thank you to Orange County Social Services Agency for supplying specific data elements. Thank you to the Children's Home Society for supplying provider and child care data as well. Finally, thank you for Quality Start OC for providing data to power the child care finder map and website.

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- ¹⁰ United Ways of California. Orange County: The Real Cost Measure in California 2023
- ¹¹ Children's Home Society of California. Special Data Request.
- ¹² Author survey of providers in Orange County
- ¹³ Author survey of families in Orange County

Demographics: Number of Children by Age Cohorts (Orange)

	0-11 Months	12-23 Months	24-35 Months	3 year olds	4 year olds	Total
Number of children (five-year estimates from American Community Survey)	35,009	37,298	37,187	39,349	39,620	188,463

Demographics: Percent of Children by Race/Ethnicity (Orange)

	0-11 Months	12-23 Months	24-35 Months	3 year olds	4 year olds	Total
Number of children, American Indian (five-year estimates from American Community Survey)	0.10% 36	0.05% 20	0.36% 135	0.51% 201	0.00% 0	0.21% 392
Number of children, Asian (five-year estimates from American Community Survey)	13.82% 4,837	12.80% 4,775	13.19% 4,905	14.85% 5,842	15.21% 6,025	14.00% 26,384
Number of children, Black or African American (five-year estimates from American Community Survey)	0.96% 337	0.95% 354	1.52% 565	1.30% 513	1.26% 499	1.20% 2,268
Number of children, Filipino (five-year estimates from American Community Survey)	1.35% 472	1.56% 582	1.76% 656	2.13% 839	1.98% 783	1.77% 3,332

Demographics: Percent of Children by Race/Ethnicity (Orange)

	0-11 Months	12-23 Months	24-35 Months	3 year olds	4 year olds	Total
Number of children, Hispanic (five-year estimates from American Community Survey)	47.23% 16,536	50.32% 18,769	47.20% 17,552	49.06% 19,303	48.29% 19,132	48.44% 91,292
Number of children, Other Race/Ethnicity (five-year estimates from American Community Survey)	0.36% 125	0.40% 148	0.25% 93	0.25% 97	0.41% 164	0.33% 627
Number of children, Two or more races (five-year estimates from American Community Survey)	7.03% 2,461	6.36% 2,371	6.51% 2,422	5.23% 2,056	4.87% 1,930	5.96% 11,240
Number of children, White (five-year estimates from American Community Survey)	29.15% 10,205	27.56% 10,279	29.20% 10,859	26.68% 10,498	27.98% 11,087	28.08% 52,928

Regional Market Rate Ceilings Allowed for State Subsidy by Age and Type
of Care (Orange)

	Birth to 24 Months	Age 2-5
Center weekly regional market full-time maximum reimbursement rate	\$395.78	\$312.68
Center weekly regional market part-time maximum reimbursement rate	\$301.85	\$246.82
FCCH weekly regional market full-time maximum reimbursement rate	\$252.73	\$238.17
FCCH weekly regional market part-time maximum reimbursement rate	\$196.04	\$181.69

Unmet Need for State and Federally Subsidized Programs for Infants and Toddlers

		0-11 Months	24-35 Months	12-23 Months	Total
Number of children	Total children	35,009	37,187	37,298	109,494
	Income-eligible and qualifying need for care (eligibility)	10,101	12,639	12,281	35,021
	Percentage of children income-eligible and qualifying need for care (eligibility)	29%	34%	33%	32%

Unmet Need for State and Federally Subsidized Programs for Infants and Toddlers

		0-11 Months	24-35 Months	12-23 Months	Total
Number of children enrolled by program type	Alternative payment	49	140	93	282
	CalWORKs stage 1	119	205	119	443
	CalWORKs stage 2	40	204	113	357

Unmet Need for State and Federally Subsidized Programs for Infants and Toddlers

	0-11 Months	24-35 Months	12-23 Months	Total
Number of children enrolled by program type				
CalWORKs stage 3	22	49	39	110
Head Start (2016-17)	81	312	264	657
Received Head Start funding only (2016-2017)	55	212	180	447

Unmet Need for State and Federally Subsidized Programs for Infants and Toddlers

		0-11 Months	24-35 Months	12-23 Months	Total
Number of children enrolled by program type	Title 5 center-based	47	162	80	289
	Title 5 family child care home network	3	17	9	29
	Title 5 migrant child care program	0	0	0	0

Unmet Need for State and Federally Subsidized Programs for Infants and Toddlers

		0-11 Months	24-35 Months	12-23 Months	Total
Number of children enrolled by program type	Title 5 state preschool program	0	0	0	0
	Total enrollment in publicly subsidized programs	335	989	633	1,957
Unmet need- based on children eligible for subsidized care (income-eligible and need for care)	Unmet need in publicly subsidized programs	9,766	11,650	11,648	33,064

Unmet Need for State and Federally Subsidized Programs for Infants and Toddlers

		0-11 Months	24-35 Months	12-23 Months	Total
Unmet need- based on children eligible for subsidized care (income-eligible and need for care)	Percentage unmet need in publicly subsidized programs	97%	92%	95%	94%

Unmet Need for State and Federally Subsidized Programs for Preschool (Age 3-4)

		3 year olds	4 year olds	Total
Number of children	Total children	39,349	39,620	78,969
	Income-eligible for subsidized early learning and care (85% SMI)	23,056	23,410	46,466
	Percentage of children income-eligible for subsidized early learning and care (85% SMI)	59%	60%	59%
Number of children enrolled by program type	Alternative payment	148	157	305
	CalWORKs stage 1	205	205	410

Unmet Need for State and Federally Subsidized Programs for Preschool (Age 3-4)

	3 year olds	4 year olds	Total
Number of children enrolled by program type			
CalWORKs stage 2	300	259	559
CalWORKs stage 3	87	113	200
Estimated TK students income - eligible for title 5	0	4,138	4,138
Head Start (2016-17)	1,285	1,558	2,843
Received Head Start funding only (2016-2017)	874	1,059	1,933

Unmet Need for State and Federally Subsidized Programs for Preschool (Age 3-4)

	3 year olds	4 year olds	Total
Number of children enrolled by program type			
Title 5 center-based	43	17	60
Title 5 family child care home network	15	20	35
Title 5 migrant child care program	0	0	0
Title 5 state preschool program	2,944	6,096	9,040
Total enrollment in publicly subsidized programs	4,616	12,064	16,680

Unmet Need for State and Federally Subsidized Programs for Preschool (Age 3-4)

		3 year olds	4 year olds	Total
Number of children enrolled by program type	Transitional kindergarten (2017-18)		7,004	7,004
Unmet need-based on all income-eligible	Unmet need in publicly subsidized programs	18,440	11,346	29,786
	Percentage unmet need in publicly subsidized programs	80%	49%	65%

Language	Number of Children
Spanish	7766
Tagalog	1
Mandarin	489
Cantonese	52
Vietnamese	1353
Russian	197
Armenian	7
Arabic	244
Other: Korean	419
Other: Persian (Farsi)	221
Other: Japanese	127
All other non-English Languages	558

Students in Protective Services: Point In Time						
Age Group	Oct 1, 2019	Oct 1, 2020	Oct 1, 2021	Oct 1, 2022	Oct 1, 2023	Oct 1, 2024
	n	n	n	n	n	n
Under 1	278	263	263	243	198	190
1-2	408	432	416	425	345	291
3-5	307	351	335	346	282	241
6-10	473	448	416	457	407	368
11-15	518	510	458	476	431	432
16-17	244	258	222	258	278	262
18-21	318	300	312	294	309	344
Missing	0	0	0	0	0	0
Total	2,546	2,562	2,422	2,499	2,250	2,128