

NATIONAL WORKFORCE SURVEY DATA BRIEF

“A Year of Tough Choices”

The Child Care Affordability Crisis is Destabilizing Educators and Families

In January 2026, early childhood educators across states and settings responded to NAEYC’s annual early childhood education (ECE) workforce survey. The survey results and accompanying testimonies demonstrate a clear crisis of affordability for the early childhood education field and the children and families they serve, and the need for stable, sustainable public investments to help ease their shared burdens.

Key findings indicate that:

- Operating costs continue to rise for all program types, and program tuition continues to rise;
- Educators are perceiving greater job loss and financial instability and insecurity among the families they serve, which is increasingly impacting program enrollment;
- Educators continue to report rising burnout and instability;
- Programs are seeing a reduction in public support, impacting their stability.

While many of the findings of this survey are consistent with what educators have reported in previous workforce surveys, we are seeing growing awareness on the part of providers of the ways families are being impacted by economic instability and uncertainty.

The findings from this survey continue to illuminate the need for both supportive policies and increased public investment in early childhood education to ease rising cost burdens for educators and the families they serve.

“As a child care provider, I see firsthand how unaffordable childcare is forcing families into heartbreaking choices. I hear parents tell me they want safe, licensed care but simply cannot afford it...At the same time, providers like me are doing everything we can to keep our doors open while operating on razor-thin margins, absorbing rising costs, and trying to serve families who desperately need us...”

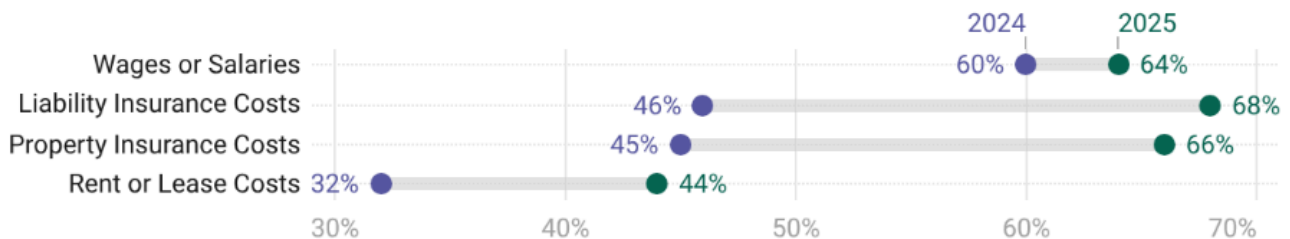
*– Home-based child care
owner/operator, New York*

Costs are Rising Faster for Programs, Driving Increased Tuition for Families

It is becoming increasingly more expensive to operate a child care program, and programs and educators are struggling under escalating cost burdens. Regular fixed costs that programs incur may include staffing, facilities, insurance, materials, food and more. Although survey respondents have consistently reported these costs rising year-over-year in our workforce surveys, we saw a sizable jump in the percentage of respondents reporting increases over several key categories, including insurance and facilities costs in the last year.

A Growing Share of Providers Report Increased Operating Costs in 2025

Percent of respondents indicating that these costs increased for them throughout 2024 and 2025:



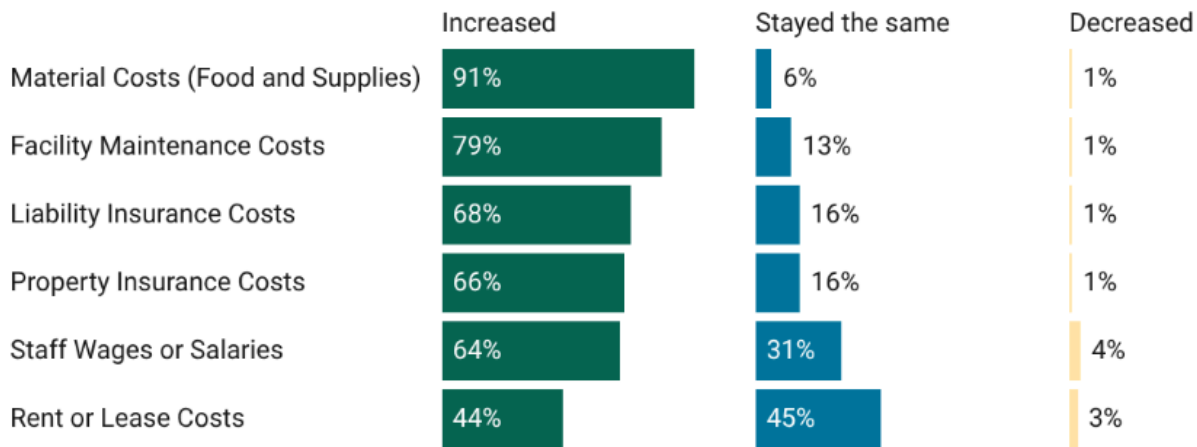
Respondents were asked similar questions in NAEYC's ECE Workforce Survey in both 2025 and 2026. In 2026, program administrators and home-based child care owner-operators (n = 3,888) were asked: "Over the past year, have the following children- and facility-related aspects of your program increased, decreased, or stayed the same?" In 2025, administrators and home-based child care owner-operators (n = 4,918) were asked: "Over the last year, what specific impacts has your program experienced?" Response options in 2025 included: "Increased," "Decreased," "Stayed the Same," "N/A," and "I don't know." While the list of items differed slightly between years to reflect each year's context, the overlapping items are listed above. Because the survey used a convenience sampling approach, it is not possible to determine the extent to which the two samples included the same respondents.

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"We are a smaller scale non-profit organization and we heavily rely on tuition income to support our staff wages and we need to increase tuition. Now more families cannot afford tuition. We are struggling to pay minimum wage and also retain the staff we currently have."
—Director/Administrator, Nebraska

Razor Thin Margins Even Thinner in 2025

Program leaders overwhelmingly report facility and staff related costs increasing over the past year.



2,741 program leaders were asked: "Over the past year have the following facility and staff-related aspects of your program increased, decreased or stayed the same?" Response options were "Increased", "Decreased", "Stayed the same", "I don't know", and "N/A". "I don't know" and "N/A" responses are not included in the graphic, thus some rows do not sum to 100%.

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When these costs rise without a simultaneous increase in public funding to fill the gap, programs are faced with difficult decisions. They can either take on the costs themselves, risking their business stability given already low operating margins, or pass them on to families in the form of higher tuition jeopardizing enrollment if families can no longer afford care. Across all setting types, with the notable exception of home-based child care programs, we saw that in 2025, a majority of program leaders reported passing at least some of those costs on to families in the form of higher tuition payments.

**"Parents cannot afford to pay more tuition but we absolutely cannot continue to function with the income structure we currently have."
—Director/Administrator,
West Virginia**

Data from our survey also point to potential solutions to rising costs for families. Respondents working in programs receiving public funding to serve all or some of their children, less often reported having to raise tuition than those that did not.

Most Child Care Programs Reported Raising Tuition Last Year

The share of respondents across each setting type reporting an increase in tuition over the last year:



The share of respondents reporting an increase in tuition last year based on receipt of subsidy:



Program leaders who responded to this question (n=2,315) "Over the past year, have the following facility-related aspects of your program increased, decreased, or stayed the same?" "Program tuition" was a response option and this graphic presents the share who selected "Increased." All differences between group values are statistically significant.

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Staffing Challenges and Changing Family Circumstances are Contributing to Enrollment Challenges

Child care programs are best able to operate when their funded enrollment is aligned with their staffed capacity to serve children and families. In 2025, close to half of respondents reported that their programs were not enrolled at the preferred capacity for a variety of reasons.

Staffing challenges and family affordability challenges remain the highest reported causes for this enrollment mismatch, but respondents reporting enrollment challenges also increasingly note impacts related to child care subsidy funding and changing parent preferences or employment schedules.

"Some days I work for free to cover copays that parents can't afford."
—Home-based child care owner/operator, Indiana

Program Enrollment Impacted by Economic Hardship and Resource Shortfalls

Percent of respondents indicating these factors are contributing to under-enrollment:

Parents can't afford to enroll their children



We don't have enough staff to open all our spaces



Our subsidy funds are reduced and/or eliminated



Lack of demand due to changes in parent schedules, employment, and/or preferences



Forty-three percent of those that responded to the question: "Does your program's current enrollment match your program's preferred/desired capacity (the number of children you would like to enroll given your ideal staff availability and supplies)?" indicated that their program was "currently under-enrolled relative to their preferred capacity" (n=2,769). Those respondents were then asked to indicate "Which of the following factors do you believe are contributing to to your program not being fully enrolled?" This graphic displays the 4 response options that were selected most often.

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Both our qualitative and quantitative data reveal growing concern about families' ability to afford child care, reflecting broader economic pressures. More than half of program leaders indicated the families they served experienced increased job loss or financial instability in 2025. They also reported that families are increasingly struggling to afford tuition costs, which as we discussed above, have risen alongside program costs.

Providers Report Worsening Hardship Among the Families They Serve Over the Last Year

Program leaders reports of changes to family economic circumstances:

■ Increased
 ■ Stayed the same
 ■ Decreased

Families struggling to afford tuition



Families experiencing job loss or financial instability



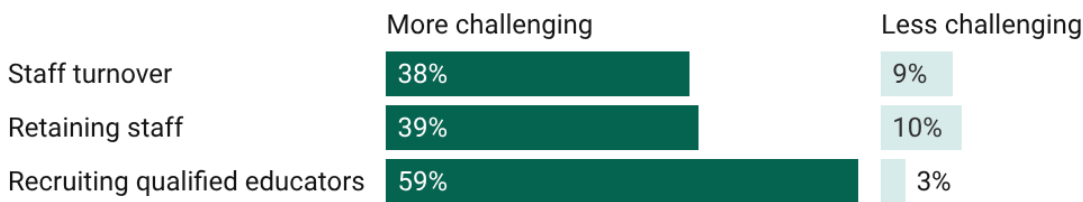
Program leaders who responded to this question (n=2,337) - "Over the past year, have the following children and family-related aspects of your program increased, decreased, or stayed the same?" N/A and "I don't know" were also answer choices, explaining why the numbers do not sum to 100%.

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Alongside concerns about the families they serve, programs continue to struggle to retain and recruit qualified staff, further compounding their challenges in serving all families who need access to care. While nearly two-thirds of the program leaders surveyed reported raising wages or salaries in 2025, it is clear that those efforts have not been sufficient to stabilize the ECE workforce. Program leaders reported increases in staff turnover more than four times as often as they reported decreases, and they reported greater difficulty retaining staff nearly four times as often as they reported less difficulty. More than half of program leaders also reported increased difficulty recruiting qualified educators.

“The number of parents that can’t afford to pay is on the rise and we can’t take them as clients because we are cutting ourselves short.”
—Home-based child care owner/operator, Connecticut

Staffing Challenges Loomed Large for Program Leaders in 2025



This chart pulls from two survey questions directed at program leaders. "Over the past year, have the following staff-related aspects of your program increased, decreased, or stayed the same?" "Staff turnover" was one of the options. The 38% reported here aligns with the number who reported turnover to be "increasing". 2,238 program leaders responded to this question. Another question, "Compared to this time last year, have you experienced more or less difficulty with any of the following aspects of your program?" "Recruiting qualified educators" and "Retaining staff" were answer choices. The numbers displayed here align with the number who reported having "more difficulty". 2,212 program leaders responded to this question.

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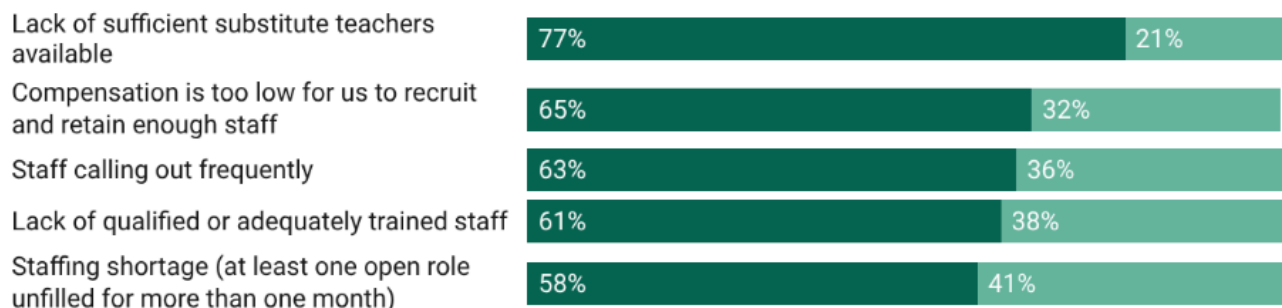
As we explore in more detail below, these staffing challenges not only limit programs’ ability to serve all eligible families, they also place added strain on the educators and staff who remain.

Educator Burnout Continues to Rise as Staffing Challenges Persist

Program leaders who responded to our survey were clear that they are experiencing a staffing crisis right now. More than half of program leaders report that they are unable to afford the compensation needed to recruit and retain qualified staff, that they do not currently have enough qualified or trained staff and substitute teachers, or that they are experiencing a staffing shortage.

Program Leaders Currently Report Outsized Staffing Challenges

■ Yes ■ No



2,249 program leaders responded to this question: "Is your program currently experiencing any of the following staffing challenges?" Response options were "Yes", "No", "I don't know", and "N/A." The absence of N/A and "I don't know" in the table explains why the rows do not sum to 100%. The response options with "Yes" selected most often are included.

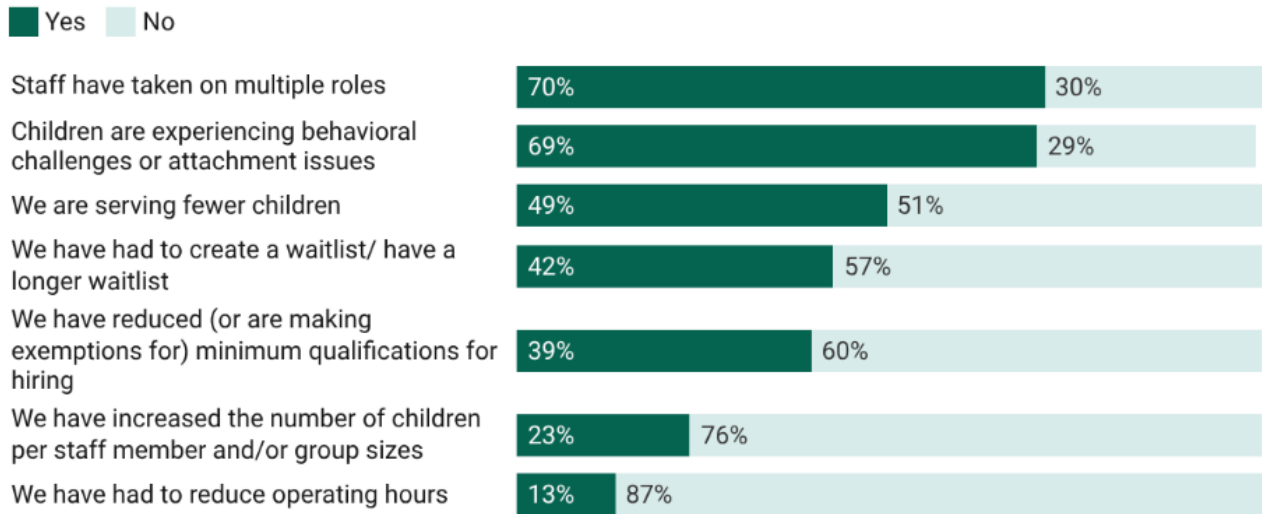
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As discussed above, staffing challenges constrain enrollment, but they also have a significant impact on the staff who remain. Over time, this strain risks creating a negative feedback loop where persistent staffing challenges lead to greater demands placed upon qualified educators, contributing to burnout, and ultimately pushing them out of the workforce.

Evidence from survey respondents indicating they were currently experiencing staffing challenges illustrates how this feedback loop begins. While most program leaders are largely not reporting increasing their ratios and group sizes in response, more are reporting making exemptions or reducing minimum qualifications for hiring, and the vast majority are disclosing that their staff have had to take on multiple roles. These struggles are occurring alongside reports of widespread behavioral challenges or attachment issues from children, which are both influenced by—and can in turn exacerbate—the strains facing overstretched staff.

"...We have continuing education hours that are required of us, we have to create lesson plans that are developmentally appropriate as well as implement them along with all the other hats we wear as early childhood educators, and yet we are unable to receive the same benefits as teachers in the school system. We have no health insurance and have to rely on the marketplace to get this and then our insurance premium increases and we can no longer afford the insurance. Now you really can't afford to get sick ever. The low wages for the amount of work we put in is difficult and why it is difficult to find and keep good early childhood educators.
—Early childhood educator, North Carolina

Staff Are Increasingly Overstretched and Facing New Challenges

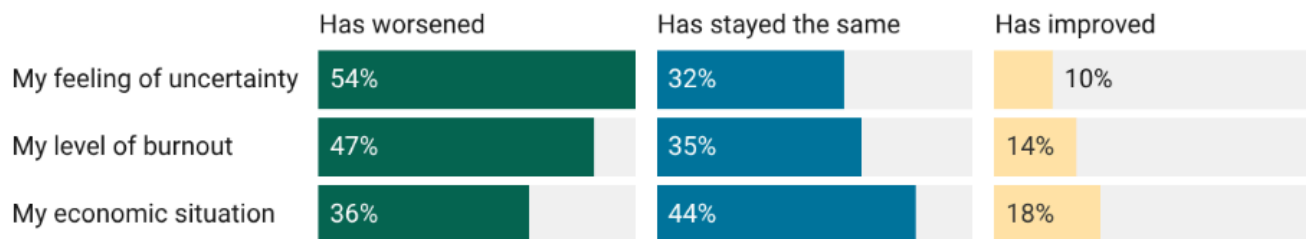


This question-"Please indicate whether your program has experienced any of the following impacts due to staffing challenges" - went to program leaders who had indicated they were experiencing staffing challenges (n=2,057).

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Perhaps unsurprisingly, given these documented staffing challenges, educators themselves are continuing to report that their personal well-being is suffering, and are continuing to weigh whether they intend to remain in this field long-term. Despite wage increases, educators reported that their economic situation worsened in 2025 more than twice as often as they reported it had improved. More than half also reported increased feelings of uncertainty and nearly half reported an increased sense of burnout. Nearly a quarter (22%) of educators indicated they were considering leaving the ECE field within the next year.

Many Educators Reported Worsening Personal Circumstances in 2025



5,348 educators responded to the question: "Comparing your personal situation now to what it was in January 2025". Answer choices included "Has improved", "Has stayed the same", "Has worsened", "Prefer not to say" and "N/A". "Prefer not to say" and "N/A" are not included in the graphic and explain why row percentages do not sum to 100%.

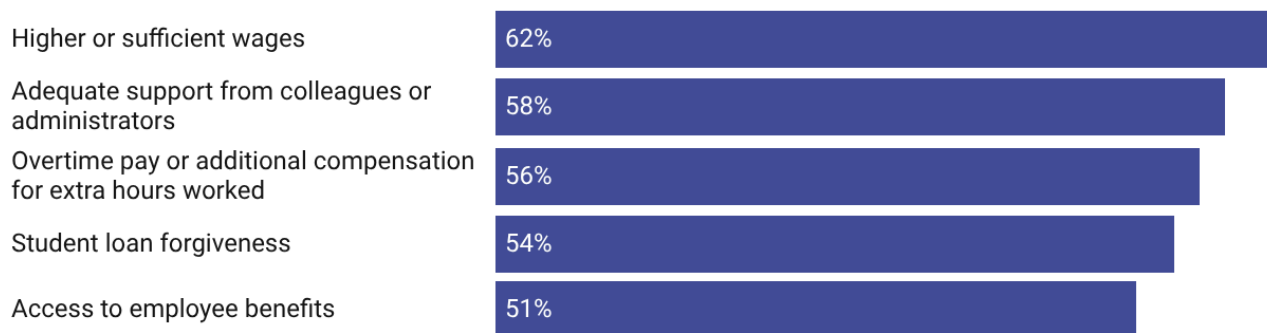
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"The uncertainty and instability have made it harder to focus fully on my work. Financially, I'm constantly worried about making rent and affording groceries, which distracts me during the day. At work, the fear of program cuts or reduced hours means I'm always stressed about job security, and this burnout makes it harder to engage with the children as fully as I want to...."
—Early childhood educator, California

Yet even as they consider leaving the field, educators are offering a roadmap as to what might convince them to stay. More than half of educators who indicated they were considering leaving the field reported they would be very or extremely likely to stay if they had access to increased wages and benefits, overtime pay, adequate support from colleagues/administrators, and student loan forgiveness. Since parents cannot afford to pay more in tuition, opening up pathways to increase wages and benefits requires additional public investment, yet educators are reporting that funding trends are moving in the wrong direction.

What Educators Say They Need to Stay in Early Childhood Education

Among educators who report they are considering leaving the field, the share indicating that the following items would make them "extremely likely" or "very likely" to stay:



1,115 educators indicated that they are currently considering leaving the ECE field. Among those, 1,047 responded to the question, "You mentioned you were considering leaving the ECE field. What would most likely influence you to stay in the ECE field?" A range of answer choices with Likert scale response options, "Extremely likely", "Very likely", "Moderately Likely", "Somewhat likely", and "Not at all likely" were offered. The numbers in this chart represent the sum of the shares reporting "Extremely likely" and "Very likely". Those items where the "Extremely likely" + "Very likely" percentages sum to more than 50% are included here.

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Providers are Perceiving a Reduction in Public Funding Support

After historic investments in ECE during the pandemic, public funding and support for child care and early learning has settled into, what we described in our survey brief last year, as an unsustainable status quo. While total federal funding for child care and early learning programs largely held steady throughout 2025, it did not keep pace with rising costs. At the same time, programs faced increased uncertainty, including federal funding delays and freezes.

Policy trends in states have been more mixed. While there has been notable progress in some states, others had to make painful cuts or increase waiting lists for child care assistance as pandemic relief funding expired and budget challenges mounted, or in anticipation of upcoming state fiscal challenges. In some cases, the same states saw both gains and setbacks in the last year alone.

From the provider perspective, our survey data clearly indicate a perception of stagnant or reduced public support at a time when that support is more critical than ever. Survey respondents reported families' access to child care subsidies and total federal or state funding for their program declined nearly three times as often as they reported increases. More than half of providers (57 percent) also reported that their trust in institutions had declined over the last year.

"Just in my infant room alone, because of these cuts and not offering vouchers my program lost more than \$1,600 a week and more than \$6,400 a month . Children that are on the waitlist can not enroll because they can not afford to pay full price for their children. We even offer a discounts or sliding scale and this too can be a burden . Parents are choosing to stay home or have relatives care for their child so my enrollment decreases."

—Director/Administrator, Indiana

From a family perspective, more than half of program leaders indicated an increase in the number of families who withdrew from their program because they lost subsidy or could not afford tuition, and nearly two-thirds observed increased financial stress among families relying on subsidies. A full three-quarters of providers serving subsidy families indicated that subsidies did not cover the true cost of quality care in 2025.

"The waiting list for subsidy has really affected my program because most of my families qualify for subsidy but because of the long wait list they can't get on it. This means my families can not afford childcare so they pull their child out of the program or they try to pay by pocket resulting in a lot of late payments."

—Director/Administrator, Maine

Providers Report Growing Strain Related to Public Funding

■ Decreased ■ Stayed the same ■ Increased

In the past year, how have the following factors changed for your program?:

Families' access to child care subsidies

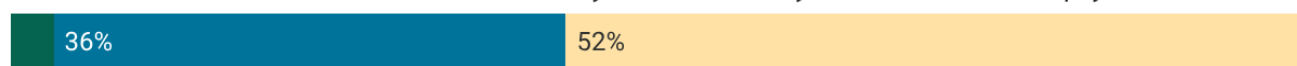


Federal or State child care funding for your program



Over the past year, have the following aspects of your program increased, decreased or stayed the same?:

The number of families who withdrew because they lost their subsidy or could not afford copays/tuition



The overall financial stress observed among subsidy families



The items in this chart were drawn from two distinct survey questions. The first question "In the past year, how have the following factors...?" went to all survey-takers and 5,259 responded. The second question "Over the past year, have the following aspects of your program ...?" went only to program leaders and 1,748 responded. Although not shown in the graphic, 3% of respondents reported that the number of families who withdrew decreased, and 2% of respondents reported that the overall financial stress observed decreased. Both questions also included an "I don't know" and "N/A" response options, explaining why row percentages do not sum to 100%.

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Policy Changes Threaten to Exacerbate Harmful Trends, but Bright Spots Remain

Policymakers at all levels of government should listen to what the early childhood field is telling them. Our child care and early learning system is not working for programs, for educators, or for the families they serve. It is becoming increasingly unaffordable for programs to provide and for families to access the high quality early childhood experiences young children need to thrive during the years of greatest brain development. Educators and parents alike are feeling the strain.

It does not have to be this way. We have ample evidence, including from NAEYC's own pandemic workforce surveys, that increased public funding makes a considerable difference in the lives of educators and families and enables programs to provide high quality experiences for our youngest learners. We continue to see leadership and progress across a diverse array of states that are building on this evidence and growing support for the field.

But in 2026, there are several concerning national policy changes that threaten to undermine progress and deepen the challenges families and children are facing.

First, is the long-term impact of [budget reconciliation legislation](#) (HRI) Congress passed in the summer of 2025. While the bill included tax provisions that could reduce child care costs for some working families, it also included deep cuts to critical social safety net programs like Medicaid and SNAP. These cuts risk not only direct harms to the early educators and families that [rely on those programs](#), but also create long-term budget challenges in states that could constrain their abilities to invest in early childhood education and educators.

Second, is a recent proposal to rescind important regulatory changes from 2024 designed to improve the ways child care programs serving families relying on subsidies are paid and cap family copayments – rules that many states have been making important progress towards meeting. Specifically, the Department of Health and Human Services proposed removing requirements that states pay providers based on enrollment rather than attendance, pay providers prospectively, leverage grants and contracts to increase access to child care for some children, and cap family copayments at 7 percent of family income. Providers in our survey indicated that these payment practices, particularly enrollment-based and prospective pay, are by far the most commonly used payment practices in the private market, and that they are important for supporting providers’ effective participation in the subsidy program. NAEYC’s [comments](#) on the proposed rule changes provide additional detail on the ways these changes could negatively impact the ECE field.

“During cold and flu season, if childcare providers were only paid based on attendance rather than enrollment, many of us simply would not survive the winter. Most of our families have multiple children, and when one child gets sick it often spreads through the entire household. Enrollment-based pay is the only model that reflects the real cost of maintaining stable staffing, ratios, and operations. Being paid at the beginning of service is equally essential... Predictable revenue allows us to plan, staff, and serve families consistently.”
—Director/Administrator, Louisiana

Finally, particularly for providers working in communities with immigrant families, or who are immigrants themselves, national trends around immigration enforcement in the last year have had an increasingly negative impact on their own well-being and that of their programs and the families they serve. Nearly 20 percent of all respondents indicated that changes in immigration enforcement had an impact on their program enrollment in 2025, and 34 percent of program leaders reported increased disruptions among families they serve related to immigration enforcement.

“...The continuous ICE activity in our community necessitates we spend endless hours in emergency response meetings, creating new policies and plans in the event our clients are swept up in a raid at work and unable to pick up their children on time ...Our children are suffering as they watch family members being taken away from them. ...The entire system is being pushed to the brink of collapse.”
—Director/Administrator, Pennsylvania

Yet even with these harmful trends, we have reason to be hopeful in 2026. Continuing to build on a recent history of bipartisan funding increases for child care and early learning programs in appropriations bills, Congress recently passed a bipartisan funding bill that increased funding for child care and early learning programs by a combined \$170 million (\$85 million each for the Child Care and Development Block Grant and Head Start). And despite a challenging fiscal landscape nationally, state and local leaders have established and supported increasingly bold investments towards more equitable, universal child care systems that meet the needs of educators and the children and families they serve. But much more work is needed.

"Our state was able to raise the amounts that are given per child per month. They are also working on lowering the rates for our families. Our registry does work hard to try to give scholarships to staff to go back to school."

—Director/Administrator, Connecticut

NAEYC remains committed to working alongside educators and program leaders and policymakers in Congress to build on this bipartisan momentum by both substantially increasing funding for child care and early learning programs and establishing policies that protect and support educators, children and families. We look forward to continuing to support the progress underway in states and communities that are taking the lead in laying the foundation for a future where every child has access to high quality child care provided by a well-supported and well-compensated ECE workforce.

Methodology

This online survey, created and conducted by NAEYC using SurveyMonkey, represents the responses of a non-randomized sample of 7,078 individuals working in early childhood education settings who completed the survey in English or Spanish between January 8-26, 2026. 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 from the CSCCE's Early Childhood Workforce Index to select the American Community Survey (ACS) occupation and industry codes that define the ECE workforce (<https://cscce.berkeley.edu/workforce-index-2024/wp-content/uploads/sites/4/2025/08/Appendix-1-Data-Sources-and-Methodology.pdf>). Using these codes, they analyzed public-use microdata from the U.S. Census Bureau's 2023 five-year ACS, accessed through IPUMS USA (<https://usa.ipums.org>), to estimate the size of each state's ECE workforce. The final sample size for analysis is 7,045. The respondents represent providers in 50 states as well as Washington, DC and Puerto Rico; 14% report that they work in home-based child care settings while 61% report that they work in center-based child care. Others reported working in public school-based, Head Start, faith-based and campus-based settings. 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 national-level 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 focused briefs and state-by-state analysis will be available, along with previous NAEYC survey briefs, at [NAEYC.org/ece-workforce-surveys](https://naeyc.org/ece-workforce-surveys).

End notes

1. All percentages reported throughout the brief represent the valid responses to each individual question as not all respondents were required to respond to each survey question. For response sample sizes by question, please reach out to the authors.
2. In several places throughout this survey, we reference data specific to "program leaders". Where that is the case, we have limited our analysis to only center directors/administrators and home-based child care owner/operators.

Copyright/Author note: NAEYC 2026. The primary staff members who contributed to this piece through survey development, data gathering, analysis, writing and design are: Daniel Hains, Meghan Salas Atwell, Joy Browne, Paola Andujar, Nicole Lazarte, Ashraf Alnajjar and Makayla Johnson.