

“A Year of Tough Choices”

The Child Care Affordability Crisis is Destabilizing Educators and Families

North Carolina

The problems are clear: The child care affordability crisis is growing worse for early childhood educators, programs, and families, with negative impacts on supply, enrollment, and educator well-being. Current policy trends risk further exacerbating that crisis.

The solutions remain clear: Robust, sustained public investments and supportive policies 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 2026, more than 7,000 early childhood educators from all states and settings—including centers, home-based child care, 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

"There are a plethora of people I meet daily that would love to work but can't work because they can't afford child care. It's not an excuse, that is a legitimate reason they can't work."

—Director/Administrator, NC

"It would greatly help if the parent copay fees went down to what is more manageable in this economy. Many parents still can't afford to pay the fees, and it adversely impacts their home life"

—Early Childhood Educator, NC

	STATE	NATIONAL
Total sample size	712	7,045
Total sample of Early Childhood Educators	475	2,697
Total sample of program Directors/Administrators and Home-based Child Care Owner/Operators	176	2,741
AMONG ALL RESPONDENTS:		
% reporting they are considering leaving the ECE field	20%	22%
% indicating their program was under-enrolled relative to capacity (nationally the top reasons for under enrollment were related to affordability and staffing challenges, not a lack of demand)	35%	43%
% indicating that changes in immigration enforcement contributed to under-enrollment at their program	12%	19%
Over the last year . . .		
% indicating federal or state funding for their program decreased	27%	29%
% indicating their program's child care subsidy payment rate decreased	8%	16%
% indicating families' access to child care subsidies decreased	20%	28%
Over the last year . . .		
% reporting their economic situation was worsened	37%	36%
% reporting they are more burned out now	46%	47%
% reporting their feelings of uncertainty have worsened	40%	54%

AMONG CHILD CARE CENTER DIRECTORS AND HOME-BASED CHILD CARE OWNER/OPERATORS:	STATE	NATIONAL
% reporting their program requires private-pay families to pay for days when their child is absent	79%	80%
% reporting their program collects out-of-pocket fees or tuition at the beginning of each week or every two weeks of care	75%	77%
% indicating their program would be more likely to accept or continue accepting child care subsidy funds if providers were paid upfront	68%	68%
% indicating their program would be more likely to accept or continue accepting child care subsidy funds if providers were paid based on enrollment	61%	68%
Over the last year . . .		
Facility-related changes		
% indicating an increase in facility materials costs (e.g., food and supplies)	85%	91%
% indicating an increase in facility maintenance costs (e.g., needed repairs)	76%	79%
% indicating an increase in liability insurance costs	51%	68%
% indicating an increase in property insurance costs	54%	66%
% indicating an increase in rent or lease costs	31%	44%
% indicating an increase in program tuition costs	56%	58%
Family-related changes		
% indicating an increase in families struggling to afford tuition	72%	65%
% indicating an increase in families facing job loss or financial instability	65%	59%
Compared to this time last year . . .		
% indicating they had more difficulty recruiting qualified educators	70%	59%
% indicating they had more difficulty retaining staff	42%	39%

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. 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. 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 briefs available at [NAEYC.org/ece-workforce-surveys](https://naeyc.org/ece-workforce-surveys).

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.