

STATEWIDE CHILDCARE SURVEY · FINDINGS

What Texas parents are telling us — and what it means for governance.

Findings from the Texas 2036 statewide research: parents, providers, employers, and voters.

WHO WE HEARD FROM

We listened to parents, providers, employers, and voters across Texas.

STATEWIDE CHILDCARE SURVEY

~975

parents of children under 6

286

childcare providers

QUALITATIVE RESEARCH

11

focus groups + interviews

Houston, Dallas–Fort Worth, San Antonio, East Texas, and Amarillo — roughly 120 parents, providers, and employers in all.

STATEWIDE VOTER POLL

702

likely Texas voters

Fielded February 2026.

THE COST OF CARE SHAPES THE SIZE OF TEXAS FAMILIES

Most parents say childcare costs affected whether to have children.



56.7%

of Texas parents say cost
affected their family-
planning decisions

TX2036 Survey



72%

of parents nationally who ruled
out another child cite childcare
cost

Bipartisan Policy Center, 2019

"Prior to starting kindergarten, childcare expenses were more than \$22,000 per year. Having another child would mean spending at least \$110,000 for childcare from birth to kindergarten. We chose to invest in our retirement rather than have a third child."

SURVEYED TEXAS PARENT

NOT JUST 1 IN 6 — THE WHOLE SYSTEM

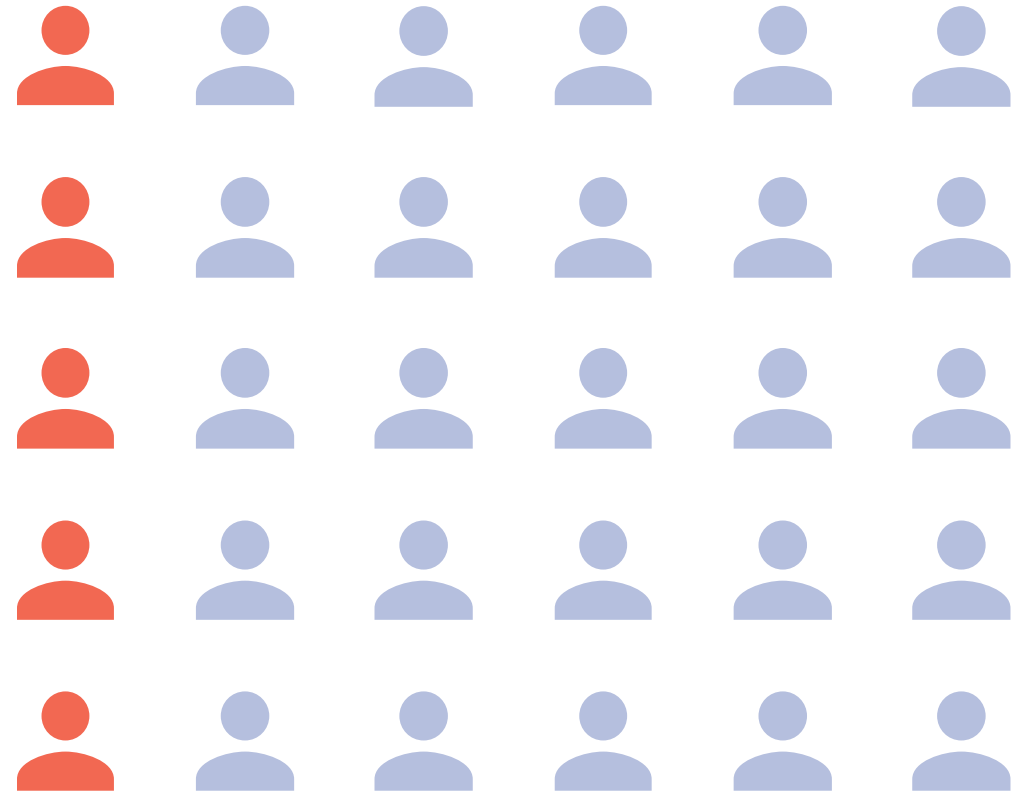
Only 1 in 6 Texas children under 6 is reached by any public program.

The other 5 in 6 rely entirely on the private market — private pay, family, neighbors, or a parent staying home.

2.4M children under 6 in Texas

~1.4M need non-parental care (64% have all parents working)

The regulatory framework — licensing and minimum standards — is the one policy surface that reaches all families, not just the 1 in 6.



Reached by a public program (1 in 6)

Private market (5 in 6)

PARENTS MAKE TRADEOFFS EVERY DAY

Nearly half of parents paying market rate make tradeoffs among quality, cost, and hours.

46.6%

sacrifice quality for affordability

43.7%

sacrifice quality to match their work
schedule and hours

6% use the state's TRS quality
rating to choose care

19% of income spent on care by
families earning under \$35K

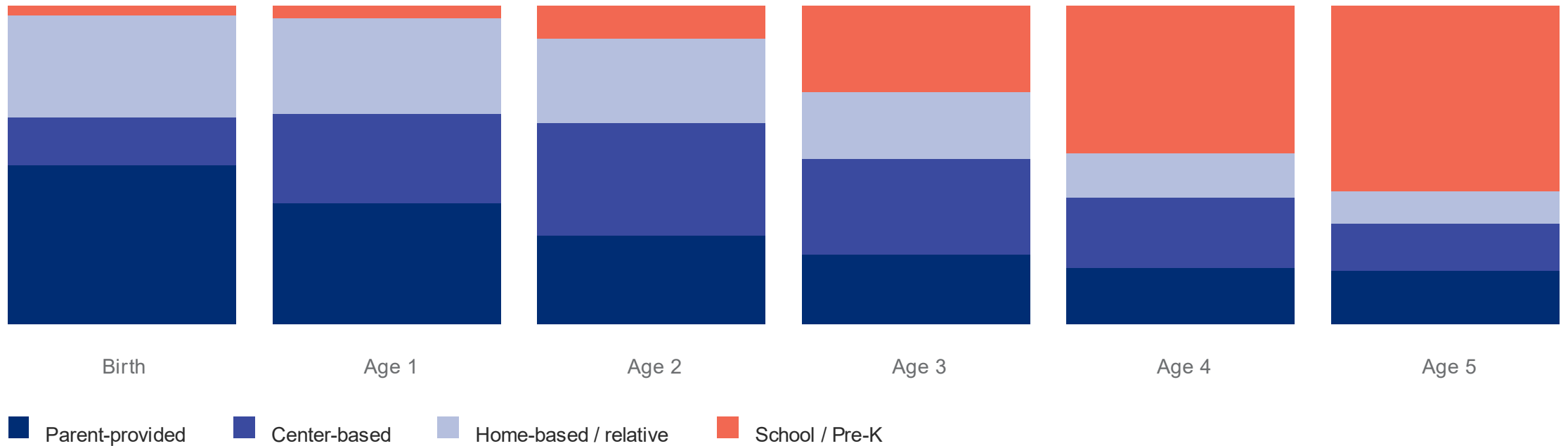
28% of parents earning under \$65K pay
beyond their affordability ceiling

SOURCE: TX2036 STATEWIDE CHILDCARE SURVEY · REPORT P.15, P.46

FAMILY NEEDS CHANGE OVER TIME

The same family cycles through multiple care types as a child grows.

Care arrangements by child's age. Parent-provided care falls from about half at birth to 17% by age 5, while school-based care surges from near zero to nearly half.



SOURCE: TX2036 SURVEY · CARE ARRANGEMENTS BY AGE · REPORT P.14 · SCHEMATIC DISTRIBUTION

FAMILY NEEDS VARY BY GEOGRAPHY

Amarillo families have different needs and preferences than San Antonio families.

San Antonio

Strong family networks — about 15% informal/FFN care plus 39% with a parent at home. Heavy reliance on intergenerational care.

"Before Pre-K, my mother and my mother in law assisted. We could not afford full- or part-time daycare. They cared for our kids for nearly 5–6 years, for free."

SAN ANTONIO PARENT

Amarillo / Panhandle

Only about 1 in 6 use informal care — the formal market carries most of the load, often with no family nearby to help.

"Both parents work full time out of the home. We have no other family, friends, or relatives to assist with childcare."

AMARILLO PARENT

47% of Texans raising a child under 6 were born in Texas — most are transplants without local family

~1.2M Texans moved counties in 2024, hampering informal-care networks

PROVIDERS ABSORB THE STRAIN

The people keeping the system running are stretched to breaking.

MEDIAN CHILDCARE WAGE TRAILS RETAIL

Childcare **\$13.71**



Retail **\$14.49**



38% of the workforce has fewer than 3 years' experience

~52 hrs/mo spent on compliance across overlapping agencies

65% of licensed childcare seats are actually in use statewide

THE ENFORCEMENT-TO-INSURANCE CASCADE

58.7% of providers rank rising operating costs their #1 challenge

Licensing citation — including non-safety quality items



Higher insurance risk profile



Premium increases

Passed to parents, or cut from wages

EMPLOYERS FEEL THE COSTS

\$7.9B

**a year in childcare-driven
workforce disruption for Texas
employers.**

\$3.4B

turnover

\$4.5B

absenteeism

62%

of working parents missed at least one workday — 11
days on average

30%

turned down a promotion

22%

of non-working parents turned down a job offer

11%

left a job altogether

SOURCE: DARO ECONOMIC MODELING · TX2036 SURVEY · REPORT P.9



Design errors require structural remedies.

Each agency does the work the Legislature assigned. No one was assigned the work of making the pieces function together.



What it takes to govern the whole system.

01 **Unified governance**

One accountable entity to tell the Legislature and the public whether the system is working, to identify when it is not, and to have the authority to act. The institutional moment is now — Task Force convened, TWC and HHSC under Sunset review, the 90th Legislature ahead.

02 **Get the regulatory mission right**

A safety baseline that enables responsiveness to diverse parental needs. Quality requirements belong in the state's investment funding pipelines, not coded as safety rules — the framework is the one lever that reaches the 5 in 6.

03 **Build the data infrastructure**

HB 3963 authorizes an integrated early childhood data system; what's missing is an institutional home to act on what it reveals. About 330,000 licensed seats sit empty while families can't find care, and the system cannot yet answer whether the dollars we spend produce the outcomes we want.

89%

of likely voters

84%

of Republicans

97%

of Democrats

call early childhood programs important — and anchor their expectations in educational outcomes over workforce participation, 56 to 38.

"The question is no longer whether to act — it is whether Texas is serious about knowing what it is buying."

REPORT CONCLUSION · P.62

THANK YOU

The State of Childcare in Texas

Full report available: <https://texas2036.org/state-of-texas-childcare/> Texas 2036 · August 2026

Charles Miller

Texas 2036

texas2036.org